

## MINESAFE 2025 KEYNOTE ADDRESS

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A very good morning, and special acknowledgement to the Chief Inspector of Mines and his team, CEOs and leadership of mining companies, Presidents and senior leadership of the unions and Associations, Government officials, colleagues, ladies and gentlemen, and all protocol observed. It is great to be here with stakeholders who continue to shape the future of South African mining. Thank you to SAIMM for the invitation to come and deliver this keynote address.

I have prepared the keynote address to explore an interesting question. The exploration started at the ICMM Responsible Mining Leadership Forum that was held in early October of this year, where a question was asked to a panel that I was part of. The question was: “**Are mines becoming safer?**” an intriguing question! The panel members were not all in agreement, much to the delight of the host and some amongst the audience, but nevertheless we did some justice in our responses given the limited time that we had. So, I thought it appropriate to share my perspectives to the question on this occasion of MineSafe.

My instinctive response was a resounding YES. But I had to contextualize the response. **Firstly**, it’s important to appreciate what mining and a mine is...it is more than just an economic activity. It is a place: a place of work, a place of livelihoods, and people thrive in this place. **Secondly**, safety must be understood holistically and beyond physical safety. It must include conditions that affect the health of employees, environmental stewardship and social responsibility; and **thirdly** the perception of external stakeholders, such as shareholders in relation to the safety of their investment, broadly measured in terms of ESG factors and the ability to deliver an expected return on investment without harm to people and the environment; **lastly** the mining method is an important consideration given the impact of geology and technology applied to mining conditions. So, it is not a simple response.

Despite the vast diversity of our mining industry and applying the criteria described above, the evidence from our recent ten-year milestone outcomes, as well as the two decades before that, show that we have made significant progress from our collective actions. However, we must acknowledge that we are not yet *safe enough*. Safety is not a finish line - It is a state of being, a continuous journey of leadership action, self-accountability, and an unwavering commitment to the lives entrusted to our care.

Our long-term safety performance tells a story of tremendous improvement. Fatalities have decreased by 80% from 270 in 2003 to 42 in 2024, a reflection of years of hard work across every part of the sector. Serious injury rates have also shown steady improvement over the same period. We see similar improvements in our health statistics. Over the 20-year period from 2005 to 2024, we have recorded a 78% reduction in total occupational diseases, from 7,822 in 2005, down to 1,723 in 2024. Our TB rates declined by 80%, while noise induced hearing loss showed a 70% decrease. The most outstanding success is the reduction in TB, where academics from the National Institute for Occupational Health published their analysis that showed that, from 2015 to 2022, the industry reduced TB rates by 16% compared to the 6% reduction nationally. This illustrates the massive efforts the industry has invested in reducing TB, which continues to be the single cause of mortality from occupational diseases.

In certain periods, our industry has even compared favourably to global peers. The ICMM's 2024 data reinforces this picture: nine out of twenty-four member companies recorded zero fatalities last year, proving decisively that *Zero Harm is possible*. However, the data also reminds us that Africa, particularly South Africa, carries a disproportionate share of global mining risk. Underground operations and process areas remain the focus of nearly 90% of global mining fatalities.

***Why have we seen improvement?*** Because responsible mining is increasingly becoming standard. Safety is now understood holistically, not just as a matter of compliance. It includes physical wellbeing, health, environmental responsibility, community confidence, and the ability of companies to operate reliably and predictably. **A safe mine is,**

**fundamentally, a responsible mine.** And a responsible mine is one that investors trust, communities depend on, and employees commit themselves to.

Despite our progress, the patterns of harm in South Africa have remained largely consistent. Falls of ground, mobile equipment and transportation-related risks, and general incidents such as being struck by objects, falling into voids/orepasses, slips & falls, falling from heights, continue to dominate fatal and serious injury profiles. Ground stability, movement in old workings, and exposure to uncontrolled energy remain among our most urgent risks to tackle. If we are to secure the next major improvement in safety, these are the areas where leadership must concentrate its efforts.

And so, the next phase of safety improvement is receiving a disciplined return to executional excellence through three key actions. **Firstly**, through **Visible-felt leadership** is the heartbeat of safety culture, where leaders are present, and connecting to the lived realities of the workforce. During this year two CEO-led VFLs were conducted by Minerals Council member CEOs. A key leadership question that was raised at the ICMM Forum that requires our attention and must be addressed is *“How do leaders adopt and follow principles that demonstrate they are listening, build trust and create an environment where the workforce is willing to speak up?”* it is a critical question when it comes to High-risk work areas, which must, in the first instance, be avoided or alternatively, supervised by competent and confidently skilled individuals. As some of our mines come to age, the conditions of mining are becoming more complex and demanding of listening, trust and speaking up. Fatigue management and mental wellness must be prioritized, and post-holiday reboarding must be structured to ensure workers return both physically and mentally prepared for work. Crucially, we must strengthen the daily discipline of critical control verification to complement our policies.

No company can achieve Zero Harm alone. Collaboration across companies, unions, regulators, suppliers, and industry bodies is essential.

That is why the Minerals Council continues to focus on unified, system-wide initiatives that address the few critical risks responsible for most of the harm across the industry.

**Secondly, Khumbul'ekhaya 2.0** represents the next evolution of our industry's responsible mining strategy and specifically in relation to safety & health. It is a proactive, human-centred and data-driven approach aimed at eliminating life-changing injuries and fatalities. It places strong emphasis on leadership, culture, psychological safety, innovation, data, wellbeing, and inclusion. It strengthens predictive capabilities through shared datasets, particularly in collision prevention and critical control verification. And it promotes the ethical leadership responsibility of ensuring that every worker feels valued, supported, and protected.

The **third** area is the **Falls of Ground Action Plan and the Transport and Machinery Programme**, which continue to unify the industry around common critical controls, shared leading indicator patterns, and enhanced skills training. The Learning from Successes programme is helping us not only to examine what went wrong, but to replicate what goes right in high-performing teams. And our work on data, standards, incident taxonomy, and shared dashboards is modernising the foundation on which safety learning and prevention depend.

Safety is not separable from environmental stewardship and societal responsibility. Tailings management, water stewardship, climate resilience, post-mine land use, and local economic succession planning all influence the trust that communities and stakeholders place in our industry. When we deliver on our promises safely, predictably, and responsibly, we strengthen social confidence, investor sentiment, and the ongoing development of critical mineral value chains.

**So, are our mines becoming safer? Yes**, they are. But we must continue to assert, with equal conviction, that we are not yet where we need to be. The lives of South African mineworkers demand more. The next decade must be defined by relentless execution: deepening leadership presence, verifying controls, strengthening energy isolation, innovating solutions,

maintaining ground support, and sharing learnings openly across companies, across sectors, and across borders.

The South African mining industry is bottoming in terms of production and economic performance and poised for growth, based on statistics such as sales growth, flattening profitability and improving expansion capex. Improvements in logistics performance, albeit slow, are encouraging as well as electricity supply, but cost of electricity is a major concern. In addition, the removal from the greylisting and improving debt ratings is beginning to establish a positive sentiment towards South Africa. The Minerals Council is working closely with members and lawmakers for a favourable mining legislation and will be developing an Investment and Growth Strategy for the South African Mining Industry. All this combined with the Khumbul'ekhaya 2.0 Strategy, bodes well for a **safe growth** of the industry, to drive transformation of society by building wealth and restoring the dignity of the nation, whilst also enabling the Just Energy Transition for South Africa and the world to thrive in a low carbon future.

**Zero Harm is achievable.** It is happening in parts of our industry and across the world. Our responsibility now is to scale that success, decisively, consistently, and permanently.

Thank you.