

QUARTERLY UPDATE

MARCH/APRIL 2020

#MakingMiningMatter

A PUBLICATION PRODUCED BY THE MINERALS COUNCIL SOUTH AFRICA FOR MEMBERS



MINERALS COUNCIL
SOUTH AFRICA

CONTENTS

- | | |
|----|---|
| 2 | From the CEO |
| 4 | COVID 19: an industry approach |
| 9 | Better safety and health statistics demand further improvements |
| 11 | Adding an industry voice to stopping gender-based violence |
| 14 | White paper pledges support for women in mining |
| 15 | Mining Indaba 2020 – a retrospective |
| 17 | Media releases |



FROM THE CEO



Dear All,

The first quarter of 2020 has been witness to an intense series of events for our industry and, in respect of many of these, for South Africa as a whole.

The COVID-19 crisis is in the forefront of all of our minds, at both a personal and a business level. The Minerals Council is fully supportive of the measures announced by President Cyril Ramaphosa to prevent the spread of the virus, and the efforts by government to manage the situation.

We recognise that, while the lock-down will have an immense impact on all South African citizens and businesses, it was necessary for a rapid intervention to 'flatten the curve'.

Roger Baxter
Chief Executive Officer

The Minerals Council and its members will continue to prioritise the health of employees and, at the same time, deliver essential services such as critical coal deliveries and, similarly, limiting the damage to operational infrastructure through necessary care and maintenance to enable full resumption of operations after the lockdown period as rapidly as safety and technical considerations will permit.

We invite you to visit regularly our COVID-19 portal for the latest available information at <https://www.mineralscouncil.org.za/minerals-council-position-on-covid-19>

The parlous state of the economy has been the focus of a great deal of our work. Since late last year, the Minerals Council has been in a series of consultations with Business Unity South Africa (BUSA) and four other major business organisations over the contribution the business community as a whole can make towards addressing the crisis and influencing government's approach to it.

Our approach, and certainly that of BUSA, has been to recognise that the situation demands that organised business needs to be forthright in expressing its view on these matters. This does not mean that we should be gratuitously adversarial, but we



MINERALS COUNCIL
SOUTH AFRICA

MARCH/APRIL 2020

#Making MiningMatter

CONTENTS

- | | |
|----|---|
| 2 | From the CEO |
| 4 | COVID 19: an industry approach |
| 9 | Better safety and health statistics demand further improvements |
| 11 | Adding an industry voice to stopping gender-based violence |
| 14 | White paper pledges support for women in mining |
| 15 | Mining Indaba 2020 – a retrospective |
| 17 | Media releases |

FROM THE CEO

continued

can no longer hold back on expressing our views, both in closed meetings and in public forums.

As a consequence of this strategy, the Minerals Council took the following steps in 2020:

- ahead of the February State of the Nation Address (SONA) and the Budget Speech, we issued a statement outlining the macro- and microeconomic steps we believe need to be taken urgently, including the issues of electricity supply and state-owned enterprises more generally;
- days prior to the SONA and the Budget Speech we issued detailed advice, in the latter case through a media briefing too; and
- after each of those we issued assessments of the content.

Overall, we are pleased that most of the issues we raised were touched on by the President and the Finance Minister respectively. However, we remain very concerned about the slow pace of decision making and implementation of key structural reforms that are necessary to rekindle competitiveness, investment and growth. A great deal remains to be done to ensure their commitments and proposals are effectively and expeditiously implemented.

A further indication of the challenges we face can be seen in the 2019 Fraser Institute rankings, which measure investor perceptions on mining policy in various mining jurisdictions.

Though South Africa maintained its position reasonably high in the lower half of jurisdictions, we were disappointed not to see any further positive progress after the improvements in 2018. Until South Africa returns to the top 25% of attractive investment destinations, the potential flow of new investment and projects will not be forthcoming

In the midst of all this, the Minerals Council also played a very active role at, and around, the 2020 Mining Indaba, as well as at the Ministerial Conference and the Mining Industry Association of Southern Africa (MIASA) meeting.

As usual we addressed the state of the mining industry and issued our annual facts and figures booklet. We also initiated discussions on the just transition to a cleaner energy mix, community relations challenges, addressing the industry's legacy issues and matters related to junior and emerging miners.

Health and safety remains a core issue for the industry, and late in February the DMRE issued its annual report on the 2019 situations. As is already known, with 51 fatalities compared with 79 in 2018, the industry achieved its safest year by a significant margin, and there were improvements in occupational health data. However, the Minerals Council's goal remains the elimination of fatalities, and the Khumbul'ekhaya campaign will continue with great intensity.

We have added a major campaign on sexual and gender-based violence and harassment to our health and safety armoury. While it is a national, and even an international, issue of deep concern, we in the mining industry need to take responsibility for addressing and eliminating it on our mines and in our communities. Doing so will also make employment in mining more attractive to women and reduce male dominance.

In parallel and related to International Women's Day held on 8 March 2020, the Minerals Council has released its Women in Mining White Paper which aims to progress the inclusion of women in the sector over the next decade. The White Paper highlights a number of strategies to include women in the workplace, as suppliers and as leaders in the industry.

Finally, and particularly sadly, we had to say farewell to Dr Xolani Mkhwanazi, our former President, who passed away on 4 January 2020. Dr Mkhwanazi played a seminal role in our industry, especially for BHP Billiton SA and for us. It was he, notably, who finally shepherded the 2010 Mining Charter through negotiations with the Department of Mineral Resources and other stakeholders. He is deeply missed.

Roger Baxter
CEO



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SOUTH AFRICA

MARCH/APRIL 2020

#Making MiningMatter

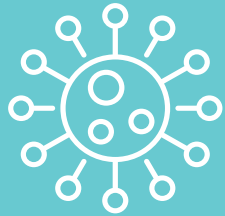
CONTENTS

2	From the CEO
4	COVID 19: an industry approach
9	Better safety and health statistics demand further improvements
11	Adding an industry voice to stopping gender-based violence
14	White paper pledges support for women in mining
15	Mining Indaba 2020 – a retrospective
17	Media releases



COVID-19

Minerals Council COVID-19 portal



COVID 19: AN INDUSTRY APPROACH

The Minerals Council South Africa recognises the novel coronavirus (COVID-19) pandemic as a serious threat to South Africa, and its people. As a significant contributor to South Africa's economy – and a major direct and indirect employer – the mining sector has an important role to play in mitigating the impact of the virus, especially on its employees, communities and operations.

The Minerals Council and its members are fully supportive of the measures announced by President Cyril Ramaphosa to prevent the spread of COVID-19, and the efforts by government to manage this unprecedented crisis.

The Minerals Council and its members continue to work closely with the

Department of Health (DoH) and the Department of Mineral Resources and Energy (DMRE); to plan and collaborate as an industry to prevent and contain the spread of the disease; to support the rapid detection and isolation of individuals who may have been affected; to ensure that employees and their families have the understanding and support they need in this challenging time; and to augment national and community resources where we are able to do so. The Minerals Council remains fully committed to working closely with organised labour, directly and through the Mine Health and Safety Council.

The accessibility of information and transparency is critical to the industry's efforts. As such the reporting of COVID-19



incidents is aligned to the requirements of the DoH in the first instance, while keeping the DMRE, the Mine Health and Safety Council (MHSC) and organised labour informed at all times.

A portal has been established on the Minerals Council website to provide all stakeholders with insight into the Minerals Council's position and the latest available information relating to the South African mining industry.

Useful links

Minerals Council position on Covid-19



MINERALS COUNCIL
SOUTH AFRICA

MARCH/APRIL 2020

#Making MiningMatter

CONTENTS

- 2** From the CEO
- 4** COVID 19: an industry approach
- 9** Better safety and health statistics demand further improvements
- 11** Adding an industry voice to stopping gender-based violence
- 14** White paper pledges support for women in mining
- 15** Mining Indaba 2020 – a retrospective
- 17** Media releases

COVID 19: AN INDUSTRY APPROACH continued



MINERALS COUNCIL
SOUTH AFRICA

MARCH/APRIL 2020

#Making MiningMatter

CONTENTS

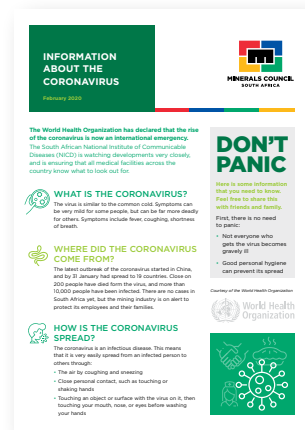
TIMELINE AND BACKGROUND



In January, the World Health Organization (WHO) declared the novel coronavirus, COVID-19, a Public Health Emergency of International Concern.

In early February, the Minerals Council provided members with materials on mitigation measures against the virus. The materials were based on communication from the National Institute of Communicable Diseases (NICD), materials provided by the WHO, targeted at employees and translated into Afrikaans, isiZulu and Sesotho.

Leaflets



Info sheet



Info sheet



Info sheet

- 2 From the CEO
- 4 COVID 19: an industry approach
- 9 Better safety and health statistics demand further improvements
- 11 Adding an industry voice to stopping gender-based violence
- 14 White paper pledges support for women in mining
- 15 Mining Indaba 2020 – a retrospective
- 17 Media releases

COVID 19: AN INDUSTRY APPROACH continued

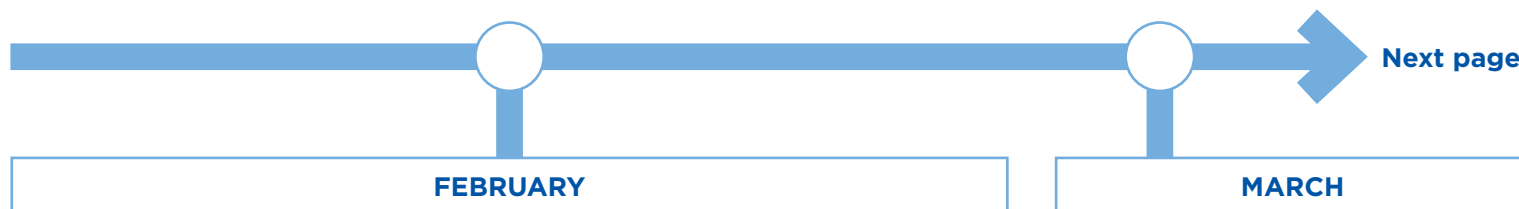


MINERALS COUNCIL
SOUTH AFRICA

MARCH/APRIL 2020

#Making MiningMatter

CONTENTS



As concern around the disease intensified, so the Minerals Council and its members continued to monitor the situation globally and nationally; to engage and align fully with the NICD planning for businesses and occupational health settings; and to develop plans to reduce and mitigate its impact.

The Minerals Council and its members developed and implemented a 10-point action plan to mitigate the impact on employees and communities.

Following the verification and confirmation by the NICD of the first case of COVID-19 in South Africa on 5 March, the Minerals Council met and engaged with the DMRE as well as organised labour. These engagements have continued throughout.

Minerals Council position on Covid-19

- 2 From the CEO
- 4 COVID 19: an industry approach
- 9 Better safety and health statistics demand further improvements
- 11 Adding an industry voice to stopping gender-based violence
- 14 White paper pledges support for women in mining
- 15 Mining Indaba 2020 – a retrospective
- 17 Media releases

MINING INDUSTRY ACTION PLAN ON COVID-19
Minerals Council response

TIMELINE

January 2020	Early February 2020	Week of 9 March 2020	11 March 2020	11 March 2020	15 March 2020	17 March 2020
NICD declared COVID-19 a Public Health Emergency of International Concern	Minerals Council convened members with material on progress measures and the usual engagement information (Minerals Council and NICD)	Minerals Council engaged with DMRE (Secretary, Chief Inspector of Mines)	WHO declared COVID-19 a pandemic after the virus reached more than 100 countries around the world	Minerals Council issued internal set of guidance material to members	President Cyril Ramaphosa declared a national state of disaster allowing measures taken by the country to combat the COVID-19 pandemic	Minerals Council meets with Minister of Mineral Resources and Energy on industry preparedness

10-POINT ACTION PLAN

1 Employee education and health awareness for employees, contractors and suppliers

- Workplace cleanliness and hygiene with disinfectants
- Require thorough handwashing and wearing hand gloves
- Provide good respiratory hygiene, including ordinary masks for sneezing and coughing periods
- Instructions for anyone with mild cough, fever to isolate

2 Health worker readiness

- Workplace hygiene
- Education on the management of COVID-19
- Trapping people with respiratory symptoms in healthcare facilities, including provision of primary masks
- Alternate arrangements for supply of chronic medication to reduce crowding
- Information on the NICD hotline

3 Ensuring access to consumables

- Consumables (masks, gloves, cleaning materials, glasses, protective gowns, etc) for medical professionals
- PPE for employees, and hardware (infrared temperature monitors)

4 Mining industry undertakes and promotes this every year

- Particularly important for people with compromised immunity, the elderly
- Risk with chronic conditions
- Companies will be identifying employees who would be most at risk, being a priority

5 Understanding the potential impact on employees who may be remote/supernomadic

- NICD advises that it is important for employees to understand their risk
- NICD and the DMRE advise that all people with COVID-19 but it does help to ensure that employees' immune systems are not compromised if they should become infected with the virus
- Hiring industry already has an HIV and TB screening campaign through Workplace Health Programme, and this will be intensified

6 Case definition and management of suspected cases or contacts of cases

- This will be done in conjunction with the NICD

7 Isolation of employees should the need arise

- Engaging with the NICD on standards/protocols for quarantine, and the potential role of new facilities
- If required, the mining industry will also require a regional approach for treatment of cases, which includes collaboration between the state and the companies
- (This will only be considered following guidance from the DMRE and NICD)

8 Travel advice

- As advised by NICD, only essential travel to areas with COVID-19 should be undertaken
- WHO advises that people coming from COVID-19 affected countries should monitor their temperature twice a day and self-isolate upon the first symptoms, as well as alert health authorities

9 Reporting and dissemination in the mining industry in the event of a case

- Any suspected or confirmed case will be reported to the Minerals Council (after consultation with NICD)
- The Minerals Council will maintain and report on industry data

10 Monitoring

- The Minerals Council will continue to monitor international statistics as presented by credible sources such as the WHO and NICD

10-point action plan

COVID 19: AN INDUSTRY APPROACH continued



MINERALS COUNCIL
SOUTH AFRICA

MARCH/APRIL 2020

#Making Mining Matter

CONTENTS

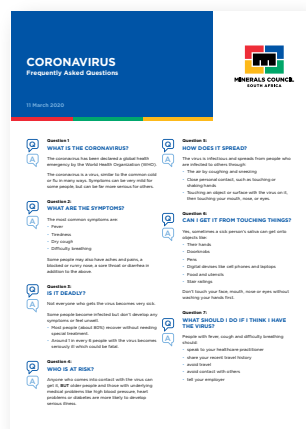
- 2 From the CEO
- 4 COVID 19: an industry approach
- 9 Better safety and health statistics demand further improvements
- 11 Adding an industry voice to stopping gender-based violence
- 14 White paper pledges support for women in mining
- 15 Mining Indaba 2020 – a retrospective
- 17 Media releases

MARCH

On Wednesday, 11 March, the WHO declared the virus a pandemic as, by then, the virus had spread to more than 100 countries around the world. At the same time, the Minerals Council provided updated information and employee communication to all its members.

Minerals Council Covid-19 posters

FAQs



Frequently asked questions

Posters



Next page

COVID 19: AN INDUSTRY APPROACH continued



MINERALS COUNCIL
SOUTH AFRICA

MARCH/APRIL 2020

#Making MiningMatter

CONTENTS

Community booklet



Minerals Council community booklet

Minerals Council community video

MARCH

On the evening of 15 March, President Cyril Ramaphosa declared a national state of disaster, announcing measures taken by the country to combat the COVID-19 pandemic. The Minerals Council listened very closely to the President's message and offered its full support.

On 18 March, the Minerals Council met with the Minister of Mineral Resources and Energy, Gwede Mantashe to discuss the industry's preparedness and, through Business Unity South Africa (BUSA), engaged with President Cyril Ramaphosa on ways to fight the COVID-19 pandemic prior to the President announcing the nationwide 21-day lock-down on 23 March 2020.

Minerals Council's response to Covid 19 - update 01

Minerals Council's response to President's 23 March address

Following the President's announcement, the Minerals Council met with Minister Mantashe, confirming its support for the 21-day lock-down. This meeting was followed by the Minister unpacking the minerals and energy industries' response in preparation for the lock-down, which came into effect at 12:00am on Thursday, 26 March.

Minerals Council confirms support for 21-day lock-down

- 2 From the CEO
- 4 COVID 19: an industry approach
- 9 Better safety and health statistics demand further improvements
- 11 Adding an industry voice to stopping gender-based violence
- 14 White paper pledges support for women in mining
- 15 Mining Indaba 2020 – a retrospective
- 17 Media releases



Minerals Council – Heartfelt conversations at Johannesburg Country Club

“WE REMAIN COMMITTED TO WORKING WITH OUR SOCIAL PARTNERS ON ALL MATTERS OF HEALTH AND SAFETY AND ARE RESOLUTE IN OUR DETERMINATION TO WORK COLLABORATIVELY TO ACHIEVE OUR GOAL OF ZERO HARM.”



MINERALS COUNCIL
SOUTH AFRICA

MARCH/APRIL 2020

#Making MiningMatter

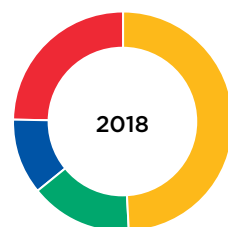
CONTENTS

BETTER SAFETY AND HEALTH STATISTICS DEMAND FURTHER IMPROVEMENTS

The 2019 mining health and safety statistics announced by Mineral Resources and Energy Minister Gwede Mantashe’s showed improved industry performance in most respects.

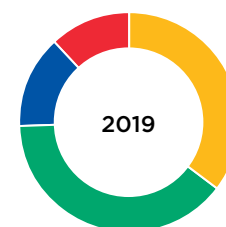
However, the deaths of 51 people in accidents last year is a powerful reminder of the huge amount of work needing to be done for the industry to achieve its goal of zero occupational health and safety fatalities.

Compared to 2018, the year-on-year reduction in fatalities was 37%. Both the gold and coal sector’s numbers indicated improvements, with fatalities dropping by 18% and 22% respectively. In contrast however, the platinum group metals (PGM) sector slipped by 67% with a total of 20 lives lost, a disheartening result for the year.

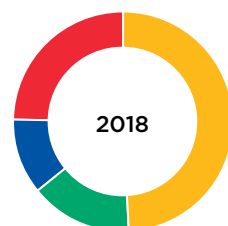


Fatalities

Commodity	2018	2019	% change
Gold	40	18	(55)
Platinum	12	20	67
Coal	9	7	(22)
Other*	20	6	(70)
Total	81	51	(37)

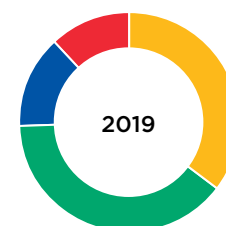


In the gold sector injuries dropped by a pleasing 19%, but the PGM and coal sectors both slipped in terms of their performance.



Injuries

Commodity	2018	2019	% change
Gold	905	732	(19)
Platinum	1,049	1,151	10
Coal	169	224	33
Other	324	299	(8)
Total	2,447	2,406	(2)



2	From the CEO
4	COVID 19: an industry approach
9	Better safety and health statistics demand further improvements
11	Adding an industry voice to stopping gender-based violence
14	White paper pledges support for women in mining
15	Mining Indaba 2020 – a retrospective
17	Media releases

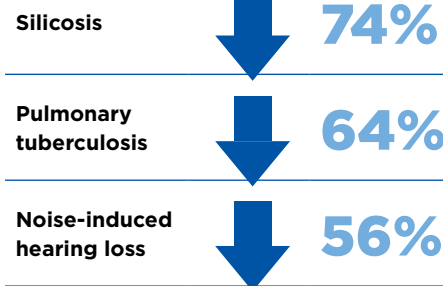
BETTER SAFETY AND HEALTH STATISTICS DEMAND FURTHER IMPROVEMENTS continued



KEY DEVELOPMENTS AND INITIATIVES IN MINE SAFETY

Year	Key developments and safety initiatives
1996	- Mine Health and Safety Act introduced - Mine Health and Safety Council established
2009	Mining Industry Occupational Safety and Health (MOSH) Learning Hub established
2010	Health and safety included in revised Mining Charter
2011	Culture Transformation Framework approved by tripartite stakeholder principals
2012	CEO Zero Harm Forum established
2014	- Tripartite stakeholders agree on 2014 milestones for health and safety - Centre of Excellence launched
2016	Tripartite stakeholders sign declaration of actions (pledge) as step-change in improving industry occupational health and safety performance, harnessing achievement of 2024 milestones and accelerating industry's journey to zero harm
2017	MOSH fall of ground task team established
2018	National Day of Safety and Health in Mining 2018 launched
2019	- CEO Heartfelt Conversations held - Khumbul'ekhaya health and safety strategy launched

Silicosis, pulmonary tuberculosis (TB) and noise-induced hearing loss remain the critical occupational diseases in the industry. It is encouraging that the incidence rates of these diseases indicated good improvement rates, all dropping by more than 56%



HIV counselling and TB screening also demonstrated excellent improvements, higher than the national average at 83% and 90% respectively. In many ways these successes can be attributed to the Masoyise Health Programme.

The South African mining industry remains resolved to work towards continuous improvement in safety and health on its mines. The successes it has reached to date are attributable to a constant focus, awareness campaigns, visibility and, importantly, to the collaborative approach with all its stakeholders. It is doubtful that the industry could have made these strides without the buy-in from our unions, government departments and non-governmental organisations (NGOs). This has been a long and hard journey, interspersed with some successes, but we will never forget the dark days and our colleagues we have lost along the way.

Useful links

Masoyise Health Programme



MINERALS COUNCIL
SOUTH AFRICA

MARCH/APRIL 2020

#Making MiningMatter

CONTENTS

2	From the CEO
4	COVID 19: an industry approach
9	Better safety and health statistics demand further improvements
11	Adding an industry voice to stopping gender-based violence
14	White paper pledges support for women in mining
15	Mining Indaba 2020 – a retrospective
17	Media releases



STOP

Abuse of women



MARCH/APRIL 2020

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ADDING AN INDUSTRY VOICE TO STOPPING GENDER-BASED VIOLENCE

South Africa already lags behind other mining destinations such as Canada and Australia, where women make up 17% and 16% of the workforce respectively. In South Africa the count is only 12%.

On 8 March, International Women's Day, the Minerals Council, in parallel with calls for growing the number of women in the industry and, indeed, in all sectors of business, launched a highly visual campaign to draw attention to the scourge of gender-based violence on South Africa's mines and also in the labour-sending areas. The industry's rationale is based on the preponderance of males in the workforce, the increase in the number of women in a previously all-male environment, and the nature of the workplaces, in particular in underground operations.

The Minerals Council's approach to this sensitive and frequently awkward topic is not prescriptive, but to bring it out into the open by providing resources, communications tools and visual media. It is aimed at both men and women. It spells out very clearly what is meant by abuse and the consequences of this behaviour. The role of the Minerals Council is to provide leadership and guidance, leaving the application and implementation of the collateral material to management at the various mines and workplaces.

Noteworthy is the profile that the Minerals Council has afforded this campaign – which is led by Roger Baxer, Minerals Council Board member and CEO, Deshnee Naidoo, Minerals Council Board member and CEO of Vedanta Zinc International, and Dr Thuthula Balfour, Minerals Council Head: Health.

IT WOULD BE A NATIONAL EMBARRASSMENT IF ABUSE AND VICTIMISATION OF, AND VIOLENCE AGAINST WOMEN WERE TO STYMIE THE MINING SECTOR'S EFFORTS TO INCLUDE, IN SIGNIFICANT NUMBERS, WOMEN IN THE WORKFORCE.

The campaign against abuse of women is graphic and forthright. Posters, fact sheets and video materials have been created for Minerals Council members to use appropriately at their mines and other places of work.

The following messaging underpins the various elements of the campaign:

- Gender based violence (GBV) is a national crisis
- Illustrating what is unacceptable behaviour
- Empowering women to understand and exercise their rights in an abuse-free working environment
- Educating employees about unacceptable behaviour and its consequences
- Encouraging reporting through safe and sensitive mechanisms

CONTENTS

2	From the CEO
4	COVID 19: an industry approach
9	Better safety and health statistics demand further improvements
11	Adding an industry voice to stopping gender-based violence
14	White paper pledges support for women in mining
15	Mining Indaba 2020 – a retrospective
17	Media releases

ADDING AN INDUSTRY VOICE TO STOPPING GENDER-BASED VIOLENCE **continued**

POSTERS



MINERALS COUNCIL
SOUTH AFRICA

MARCH/APRIL 2020

#Making MiningMatter

CONTENTS

- [2](#) From the CEO
- [4](#) COVID 19: an industry approach
- [9](#) Better safety and health statistics demand further improvements
- [11](#) Adding an industry voice to stopping gender-based violence
- [14](#) White paper pledges support for women in mining
- [15](#) Mining Indaba 2020 – a retrospective
- [17](#) Media releases

ADDING AN INDUSTRY VOICE TO STOPPING GENDER-BASED VIOLENCE continued

FACTSHEET



MINERALS COUNCIL
SOUTH AFRICA

MARCH/APRIL 2020

#Making MiningMatter

CONTENTS

- 2 From the CEO
- 4 COVID 19: an industry approach
- 9 Better safety and health statistics demand further improvements
- 11 Adding an industry voice to stopping gender-based violence
- 14 White paper pledges support for women in mining
- 15 Mining Indaba 2020 – a retrospective
- 17 Media releases



WHITE PAPER PLEDGES SUPPORT FOR WOMEN IN MINING

■ Implats – Impala mine

“IN THE MINING INDUSTRY GENDER-INCLUSIVE WORKPLACES HAVE BEEN SHOWN TO BE SAFER.”

Deshnee Naidoo, CEO, Vedanta Zinc International and Minerals Council board member

A first for the Minerals Council this year was the publication of a white paper on Women in Mining in South Africa.

This document provides background to the issue of women in mining, along with a situational analysis that unpacks the current situation in respect of women in the country's mines. However, we also have attempted to provide the Minerals Council's overriding philosophy on the issue, which we hope will provide our member companies with a perspective on an issue that has many complexities and challenges.

Given that the participation of women in business has been shown to positively influence the bottom line of companies and to contribute to enhanced sustainability, the Minerals Council's initiative plans to streamline the mining industry's existing strategies to promote women by advancing women representation and to encourage decisions that are in women's best interests. Findings from a Minerals Council survey into

the complexities of successful integration of women in the industry highlighted some interesting perspectives, including:

- the most successful women in mining programmes are led by CEOs;
- mechanisation could help to create a more equal working environment for men and women
- that there is a pay gap in certain companies
- that it is more difficult to drive transformation in contractor companies
- the most common challenges have to do with the biological differences between men and women, particularly physical capacity, pregnancy and ablution and sanitary requirements

The White Paper, however, does not only analyse the situation – it proposes a proactive, hands-on action plan that will be rolled out to member companies and comprises some simple and logical steps

for companies to take on board in order to more effectively break down the barriers for women to thrive and succeed in the industry. Included are women in mining key performance indicators (KPIs); diversity programmes; adapting workplaces to the needs of women; re-engineering work processes, if required, and collaboration with partners which advance the cause of women, e.g. MHSC and Women in Mining South Africa (WiMSA).

The MHSC has historically dealt with workplace concerns, including those relating to personal protective equipment and the impact of mining on reproductive health, and will be establishing a separate advisory committee on women in mining which will report directly to the Minerals Council.

Ms Naidoo was nominated by the Minerals Council Board to lead the development of the initiative, and Dr Thuthula Balfour, Head: Health, leads the project from within the Minerals Council.



Deshnee Naidoo
Vedanta Zinc International: CEO



Dr Thuthula Balfour
Head: Health



MINERALS COUNCIL
SOUTH AFRICA

MARCH/APRIL 2020

#MakingMiningMatter

CONTENTS

2	From the CEO
4	COVID 19: an industry approach
9	Better safety and health statistics demand further improvements
11	Adding an industry voice to stopping gender-based violence
14	White paper pledges support for women in mining
15	Mining Indaba 2020 – a retrospective
17	Media releases



MINING INDABA 2020 – SOME SPECIFICS

40 African countries

> 6 500 delegates

36 junior miners

> 300 speakers: 27% women

243 journalists



MINERALS COUNCIL
SOUTH AFRICA

MARCH/APRIL 2020

#Making MiningMatter

CONTENTS

MINING INDABA 2020 – A RETROSPECTIVE

It was only eight weeks ago, yet the Investing in African Mining Indaba 2020 seems to have played out in a completely different world. Such has been the effect of the reaction, and dare one say it, hype in certain quarters, to the Coronavirus.

Every year the Mining Indaba unfailingly transforms Cape Town into a mecca for the global mining industry – its producers, suppliers, investors, bankers, publicists and other stakeholders. Kick-off to the three-day sunshine shindig started with the Minister of Mineral Resources and Energy Gwede Mantashe's much-anticipated opening address to an audience desperate for good news for a sector that, in spite of all the challenges and obstacles, remains able to present opportunities for global capital on the one hand and still supports so many people in this country on the other.

The Minister's speech touched on many of the areas the industry has flagged as "concerns", including regulatory certainty and community unrest, but the main thrust of the speech was sustainable energy generation for the industry. However, Mr Mantashe had a surprise up his sleeve too – with his pronouncement on a new, alternative power generation company outside Eskom, which would seek to attract investors as partners with government, to make available less costly power to the country's industrial sector.

Optimising Growth and Investment in the Digitised Mining Economy was the theme for Mining Indaba 2020, and the programme included the Intergovernmental Summit, Battery Metals Day, Sustainable Development Day and the new General Council forum. The main stage sessions included topics such as resource nationalism, price volatility and its impact on mining investment, tackling the youth challenge, and green and sustainable technology.

A thorough review of the Minerals Council's presence, activities, and effectiveness at Indaba 2020 has once again indicated that the Indaba is an important platform for us to promote our brand and our significance. With a focus this year on safety, women in mining and emerging miners, the Minerals Council's promotional presence included a well-positioned booth – a useful space for coordinating activities, and sometimes just catching a breather. Indaba opening day, however, was planned for maximum impact with a media briefing on the State of Mining fielded by the powerful panel of Mxolisi Mgojo, Roger Baxter and Henk Langenhoven. At the same time the Facts and Figures Pocketbook 2019 was launched.

Useful links

*Minerals Council facts and figures
pocketbook*

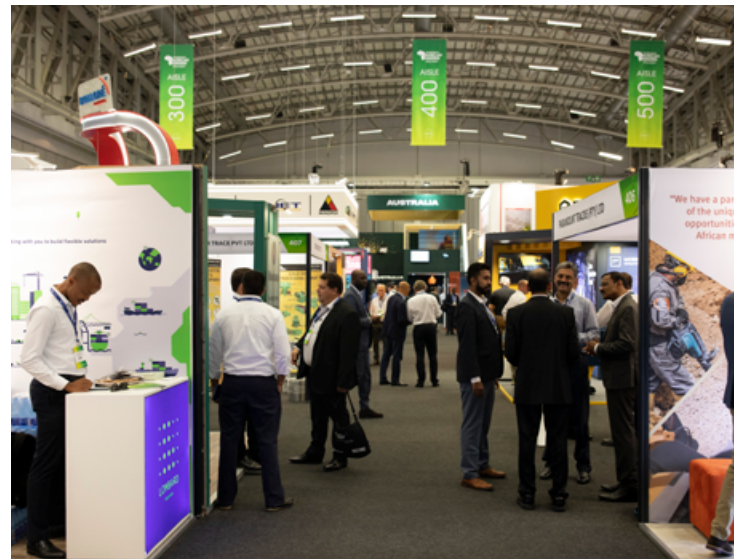
2	From the CEO
4	COVID 19: an industry approach
9	Better safety and health statistics demand further improvements
11	Adding an industry voice to stopping gender-based violence
14	White paper pledges support for women in mining
15	Mining Indaba 2020 – a retrospective
17	Media releases

MINING INDABA 2020 – A RETROSPECTIVE continued

Within the intensive three-day Indaba programme Minerals Council members hosted and/or participated in more than ten media events on a host of subjects. Some of the key events are listed below:

- *State of Mining* media briefing
- Media discussion on *Mining and Communities*.
- Panel discussion *Leading mining into the future*
- Media briefing: *The Coal Debate*
- Media discussion: *Health and Safety in the Mining Industry*
- Media discussion: *Junior and Emerging Miners' desk*
- Media briefing: *Dealing with legacy issues*

Once again the Minerals Council branding, collateral, and media activity translated into coverage that was largely fair, positive and balanced. Strategically placed advertising, both print and electronic, gave further legs to our branding and, for those journalists who did not notice, the press lounge sported a blown up picture of the Minerals Council team at the previous Indaba. Ten out of ten for visible longevity!



MINERALS COUNCIL
SOUTH AFRICA

MARCH/APRIL 2020

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CONTENTS

- | | |
|----|---|
| 2 | From the CEO |
| 4 | COVID 19: an industry approach |
| 9 | Better safety and health statistics demand further improvements |
| 11 | Adding an industry voice to stopping gender-based violence |
| 14 | White paper pledges support for women in mining |
| 15 | Mining Indaba 2020 – a retrospective |
| 17 | Media releases |

MEDIA RELEASES

To find out more about the Minerals Council's recent activities, take a look at the media releases listed below:

March 28, 2020	Minerals Council notes Moody's ratings downgrade decision
March 25, 2020	Minerals Council confirms support for 21-day lock-down
March 24, 2020	Minerals Council's response to President's 23 March address
March 22, 2020	Minerals Council to collate information on COVID-19 impact on mines
March 18, 2020	Minerals Council's response to COVID-19 - update 01
March 06, 2020	Minerals Council position on COVID-19
March 04, 2020	Minerals Council launches campaign to address sexual and gender-based violence and harassment in the mining industry
March 04, 2020	Minerals Council publishes White Paper focused on streamlining industry strategies to advance women in mining
March 03, 2020	Minerals Council notes poor gross domestic product (GDP) numbers for fourth quarter 2019 and urges government to move faster on improving growth prospect
February 27, 2020	Minerals Council notes South Africa maintains its performance in Fraser Institute rankings
February 26, 2020	Minerals Council recognises Finance Minister's efforts to address South Africa's economic challenges
February 21, 2020	Minerals Council calls for a budget to put economy on sustainable growth path
February 21, 2020	Minerals Council opposes Eskom Regulatory Clearing Account (RCA) application
February 13, 2020	Minerals Council responds to SONA
February 12, 2020	Minerals Council looks forward to a decisive SONA
February 04, 2020	Minerals Council supports just transition to a cleaner energy mix
February 03, 2020	Minerals Council publishes Facts and Figures 2019 pocketbook
January 28, 2020	Minerals Council establishes Associations Leadership Forum
January 24, 2020	Minerals Council notes publication of 2019 health and safety statistics
January 13, 2020	Minerals Council South Africa calls for urgent steps by government to address the country's economic crisis
January 06, 2020	Minerals Council South Africa expresses condolences on the death of Xolani Mkhwanazi

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MINERALS COUNCIL
SOUTH AFRICA

MARCH/APRIL 2020

#Making MiningMatter

CONTENTS

2	From the CEO
4	COVID 19: an industry approach
9	Better safety and health statistics demand further improvements
11	Adding an industry voice to stopping gender-based violence
14	White paper pledges support for women in mining
15	Mining Indaba 2020 – a retrospective
17	Media releases