MINERALS COUNCIL
SOUTH AFRICA

Mining Modernisation Showcase Event – 23 July 2026
Welcome Adress – Mzila Mthenjane
CEO, Minerals Council South Africa

Good morning, ladies and gentlemen, and all protocol observed,
Welcome to the Mining Modernisation Showcase

It is a pleasure to see this room filled with the presence of such a diverse group of stakeholders — industry leaders, researchers, government partners, and innovators from across South Africa's mining community. We are gathered this morning for a shared purpose.

Thank you for making the time to be here.

I want to begin with acknowledging the partners and partnerships that have made this event possible - this is the product of collaboration between the Minerals Council South Africa, RIIS, PwC, the HSRC's Centre for Science, Technology and Innovation Indicators, the Department of Science, Technology and Innovation, and the National Advisory Council on Innovation. This list of institutions reflects something important: the modernisation of our mining industry is not a task any single organisation can undertake alone.

So, why we are here?

Periodically, an industry must pause and answer two questions honestly: ***where are we?*** and ***where are we headed?*** Not where we believe we are or where our communications suggest we are. But rather, *where the evidence, tested against international practice, indicates we are and stand.* That is the purpose of today.

Over recent months, three independent but complementary pieces of research have been completed, each examining *modernisation* in South African mining from a different perspective. We have defined Modernisation as ***the people-centred adoption of new technologies, mining methods, skills and systems to enable mining that is safer, healthier, more productive, more competitive and more sustainable***.

The research pieces are:

- The **Global Benchmarking Report**, prepared by RIIS and the Minerals Council South Africa, which situates South African mining against its international peers.

- The **RDI Survey Report**, prepared jointly by HSRC-CeSTII and RIIS, which establishes the extent of research, development and innovation activity in this sector, and where it is concentrated.

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- The **10 Insights into 4IR Report**, prepared by PwC, which examines where artificial intelligence and fourth industrial revolution technologies have moved into genuine operational use, and where they have not.

Each of these reports carries value independently. Together, they constitute something more substantial: a comprehensive view of *modernisation* in the country's mining industry — the investment we are making, our standing relative to the rest of the world, and the practical extent to which advanced technology is being deployed on our mines.

Why does this matters, now?

This matters, because #**MiningMatters**.

South African mining remains a principal engine of this economy. Our members account for a large portion of the country's mineral production (more than 90% based on annual minerals sales by value) and sustains close to half a million jobs directly, with more than 3 million dependent on the sector indirectly. The challenges before us are well understood: ageing infrastructure, deepening and increasingly complex orebodies, constraints in energy and logistics, and a global investment community with no shortage of competing jurisdictions for its capital. Opportunities are also abundant, including a domestic and global minerals demand for infrastructure and basic services development, driving the energy and technology transition and elevating significant social prosperity.

In this context, modernisation is not a discretionary pursuit. It is what will keep this industry safe, healthy, competitive, and viable for future generations.

This showcase, accordingly, is intended to achieve three things.

- *First*, to create genuine space for evidence-informed dialogue amongst industry stakeholders — dialogue conducted candidly and grounded in what the research shows.

- *Second*, to ensure these findings move beyond the page. Research that goes unread changes nothing. Our task today is to carry these insights into the conversations and decisions that shape impactful action in the form of policy, strategy, and investment that will lead to growth

- *Third*, to use today to build the connections and collaborations required to translate insight into implementation. Some of the most consequential outcomes of this morning will occur not from this stage, but in the conversations conducted over its course.

What can you expect from the programme ahead?

- You will shortly hear from the RIIS team on the Global Benchmarking findings, and then from the HSRC on the RDI survey. PwC will then present their 4IR insights.

- We will then convene a panel bringing together leading voices from Wits University, the Mandela Mining Precinct, the CSIR, and an industry representative, to consider what these findings mean for the path ahead.
- The day will close with addressing the questions of what matters most: what comes next, and who is responsible for it.

Engage today not merely as recipients, but as participants of what is done with this research.

The future of modernisation in South African mining will not be forged by individual companies or institutions working in isolation. It will be forged together.

Thank you for being here. It is now my pleasure to hand over for the first presentation of the day.
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