

The Chamber of Minerals & Energy of WA
Annual Report 2022





MESSAGE FROM THE PRESIDENT FIONA HICK

2022 was a remarkable year.

Western Australia's borders came down on 3 March 2022, which opened our state back up to the world following the COVID pandemic. Through such significant change in recent years, I am deeply encouraged to see both our organisation and our members continue to support such a strong Western Australian mining and resources sector and the benefits that this brings.

In 2022 we said farewell to Chief Executive Paul Everingham, who played a significant role over his four years in what was arguably the most challenging era in CME's 121-year history. We were then privileged to have Rebecca Tomkinson join as Chief Executive later in 2022 and she hit the ground running, building relationships and innovative ideas to continue CME's growth and value for members.

The Chamber of Minerals and Energy's strategy is to support the contribution, capability, and competitiveness of the WA resources sector. In 2022 there were many achievements in each area.

Contribution - the sector makes a significant contribution to individuals and communities. In the past two State Budgets, mining royalties, lease rentals and North West Shelf grants accounted for more than \$12 billion, or one third of the State's revenue. That's in addition to corporate tax that mining companies pay to the Federal Government, which was more than \$26 billion last year across Australia. Resource sales from WA in 2021-22 were a record \$231 billion and total employment for the sector in 2021-22 was more than 157,000 – another record.

Capability - CME aims to build the skills of the current workforce and attract future talent. We do this through a wide range of platforms aimed at promoting the career pathways and opportunities available. Our members invested in the education of young people to teach them digital skills for the jobs of the future through CME's Digital Technologies Program. To date, 66 schools across regional WA have participated and by supporting

teachers to deliver engaging, real-world learning in the classroom, students are encouraged to pursue STEM subjects in senior years as well as post-school pathways.

We also continued the Women In Resources Awards to celebrate the power and value of gender diversity in the sector. The Inspiring Girls Careers Forum was held, which provided hundreds of school students the opportunity to meet female leaders in our sector and hear their inspiring stories first-hand. Finally, we shared best practices and lessons learned through CME's Safe and Respectful Behaviours Working Group, with over 40 member companies and the goal to continue to increase the diversity and inclusiveness of our workforces and ensure the sector is a safe and attractive industry for everyone.

Competitiveness – CME's focus is to support business confidence and support further investment in the sector. In 2022 there was regular engagement with Government to ensure regulatory and assessment processes are as efficient as possible to enable WA to take advantage of the significant opportunities. This includes decarbonisation, where through our 'safer, smarter, cleaner' approach, CME and its member companies publicly supported the emission reduction targets set by the Paris Agreement, including a commitment to net zero emissions. Our members are at the

forefront of transformational efforts to reduce emissions including transitioning from diesel to renewable power sources, using electric vehicles and machinery on site, advancing production of downstream battery minerals, investing in carbon capture and storage and significant investments in hydrogen as a future energy source. The commodities that our sector mines and refines are fundamental to global decarbonisation so we must ensure policy settings support global competitiveness.

It's incredibly positive to see the strength of the Western Australian mining and resources sector and how much it contributes to the economy, creating jobs, engaging local businesses and supporting local communities.

I would like to sincerely thank Rebecca and the CME team for their efforts and achievements. I would also like to thank all the individuals from our member companies who dedicate their time to committees, working groups and regional councils. It is this combined effort that enables CME to truly succeed.

On a personal note, this annual report and the accompanying AGM concludes my chapter as CME President after two fulfilling years in the role. It has been a privilege to work with such a great team and I wish my successor as CME President all the best for the future.



Gold Fields - Agnew Hybrid Renewable Microgrid

MESSAGE FROM THE CEO

REBECCA TOMKINSON



Notwithstanding global market turbulence, our industry continued to thrive in 2022 and it's my pleasure to be delivering my first Chief Executive Officer (CEO) update in CME's 2022 Annual Report.

In 2021-22 Western Australia's mining and resources sector contributed a record \$231 billion to the national economy and directly employed more than 150,000 people. This is a tremendous contribution to the nation and one that we foresee will continue as: traditional staples like iron ore, gold, nickel and LNG continue to perform strongly; we begin to deliver on the enormous opportunities inherent in our rare and critical mineral deposits; there is potential growth of a clean hydrogen industry; some \$144 billion in projects are currently under development throughout our state; and exploration is at record highs.

Nonetheless, with COVID-19 in our rear mirror, our sector faces headwinds in the form of intense global competition for investment capital, inflationary pressures, geopolitical tensions, disrupted supply chains, and a constrained local labour market exacerbated by global skill shortages.

In light of these challenges, CME continues to work diligently and constructively with governments, partner peak bodies and other

key stakeholders to ensure that Australia, and particularly Western Australia, remains an attractive investment destination with a competitive cost base, workforce mobility, livable regions, and a stable and efficient regulatory framework.

This is particularly important in 2023 as the State and Federal governments embark on comprehensive and ambitious programs of legislative reforms in areas relating to industrial relations, cultural heritage and environmental protection – whilst also making strategic decisions regarding energy networks, investment initiatives, and trade partnerships that have multi-generational impacts on our prosperity, security and decarbonisation.

CME and our member companies are also working diligently to unlock human capital throughout our state and to inspire the next generation of mining and resources workers. When our workplaces are as diverse as the communities we live and work in, we are more innovative, safer, stronger, and resilient. I am pleased to see the ever-growing range of platforms through which the sector showcases diversity and promotes the career pathways and opportunities available to everyone - including CME's Inspiring Girls event, Digital Technology Program, and the Women in Resources Awards which celebrated its 13th year in 2022.

Having commenced the CEO role in late 2022, I owe a great deal of thanks to Paul Everingham for his stewardship of the organisation over many years, and to Rob Carruthers for his leadership as interim CEO in 2022. I also extend my thanks to the wonderful CME team and the members who guide and govern our organisation, including our President Fiona Hick.

I hope you enjoy the reflection on our activities and achievements throughout 2022, and I look forward to working closely with our members in 2023.

2023 PRIORITIES

Approvals Reform

Streamlining regulatory approvals processes at a State and Federal level to ensure high standards whilst avoiding and removing unnecessary duplication and administrative impost.

Cumulative costs

Recognising the significant taxes and royalties paid by industry and the impact of increases in Government fees and charges, including the increased use of cost recovery risk, on the competitiveness of the sector.

Productivity

Advocating for a fair and stable industrial relations landscape in light of continued labour and skills shortages and the need to ensure efficiency and security of our supply chains.

Climate Policy

Supporting a climate change framework that balances the social, economic and environmental aspects of emissions reduction as industry works towards net zero targets and an energy transition which is informed by least cost, transparent and equitable market trading mechanisms.

Energy Transition

Ensuring a managed transition of our energy networks which supports company progress toward net zero targets and provides security of access to reliable, low emissions and affordable energy.

Sustainability

Promoting the sector's leadership in innovation and technology development supporting carbon reduction, renewable and clean industry development and new, safer and more efficient ways of working.

Diversity and Inclusion

Lifting diversity and inclusion outcomes, addressing the recommendations from the WA Enough is Enough and Federal Respect@Work report and continuing to advocate for improved accessibility to quality Early Childhood Education and Care in the regions.

Health and Safety

Working with Government and industry to support the rollout of the new Work Health and Safety legislation in WA, including a continued focus on psychosocial health and safety and finalisation of supporting guidance material.

Strategic Industry Project Pipeline

Positioning WA's critical and battery minerals as a key opportunity for our state and nation, and a case in point for addressing supply side barriers such as onerous regulation and skills shortages and ensuring competitive cost and policy settings.

Regional Liveability

Working collaboratively with State and Local Government to take a solutions-focused approach to addressing issues of regional liveability including training and education, access, healthcare, childcare and housing.

CONTRIBUTION

In 2022, CME advocacy and efforts resulted in...



2020-21 Economic Contribution Factsheets

Publication of factsheets representing the direct and indirect economic contribution of 56 CME member companies, generating wide media coverage. Launched in April, the 2020-21 factsheets revealed a record \$100.46 billion in direct contribution to national economy, with \$61.19 billion of that flowing to WA. The data provides statewide and regional breakdowns and continues to be an essential input to CME submissions, social media and campaign content, stakeholder meetings, and responses to media enquiries.

Statewide communications campaign

Significantly increased public awareness of the sector's activities and community links through the [Safer. Smarter. Cleaner.](#) ad campaign. The campaign reached 15.4 million people from February to November 2022.



Kimberley flood support

Members collectively donating over \$8 million to relief efforts, including through the Lord Mayor's Disaster Relief Fund and Foodbank to support communities affected by devastating floods in the Kimberley.

Verisafe Program

A reinvigoration of the program, including a review of the verification of competency (VOC) assessment instruments and governance framework and establishment of a new website and audit framework.

Increased political engagement

Facilitation of a tour led by the Federal Resources Minister Madeleine King, alongside other Federal and State Members of Parliament and other key government stakeholders, visiting member operations across the Pilbara.

Increased regional engagement

Increased CME led regional tours and site visits across the state. CME continues to facilitate visits to regional operations and towns in recognition of industry's contribution to the state and national economies and the opportunity for future focused projects to be developed in regional WA.

CME represented industry and presented at an increased number of regional economic conferences and forums.

Resources Community Investment Initiative

A commitment by mining and resources companies of \$750 million towards iconic State infrastructure projects and community and social initiatives across Western Australia.



CME COVID-19 Support

A smooth transition to the re-opening of State borders in March 2022 and return to business as usual. CME provided ongoing support to members and communities navigating COVID-19 and ensured the sector's continued safe operation and cross sector collaboration throughout COVID was widely acknowledged and appreciated by Government and other stakeholders.



COMPETITIVENESS

In 2022, CME advocacy and efforts resulted in...

Approval processing timelines

A commitment by the WA Government to implement a range of short-term measures to improve approval processing timelines after CME escalated industry concerns regarding approvals delays and cross-agency duplication.

Safeguard Mechanism

Strong advocacy including direct engagement with Climate Change and Energy Minister Chris Bowen and his office in Canberra, on the Government's proposed Safeguard mechanism with the need for flexibility recognised and many of the settings advocated by CME included in the subsequent detail released for further consultation.

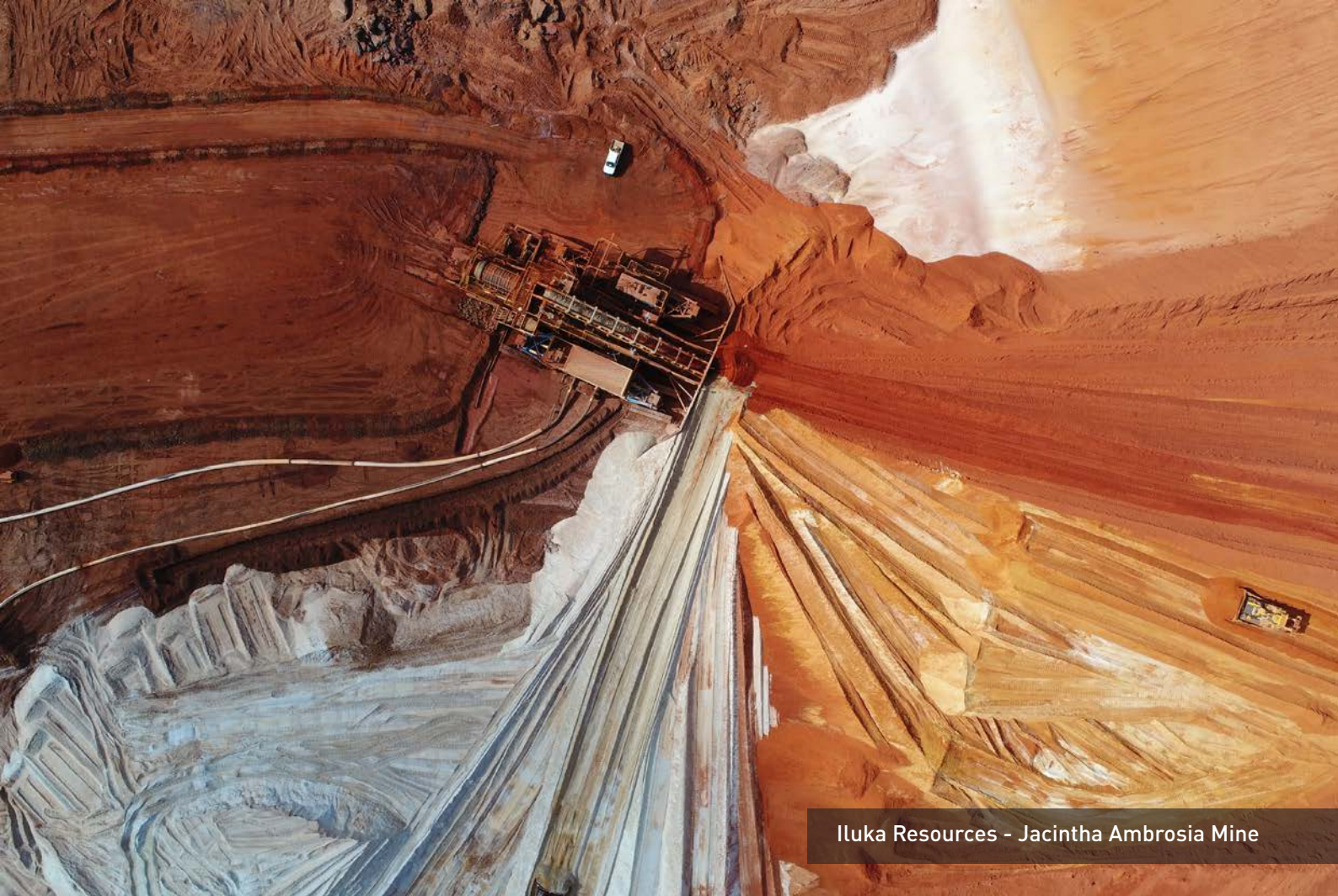
Aboriginal Cultural Heritage co-design

CME participation in the reference group and selection panel for the inaugural Aboriginal Cultural Heritage Council. CME also advocated for the WA Government funding allocation to support capacity and capability of Local Aboriginal Cultural Services.

Strategic Industry

Strong advocacy for enabling 'strategic industry' policy settings continued, including participation in the WA Future Battery Taskforce and the National Critical Minerals Strategy consultation document reflecting many of opportunities and challenges raised by CME.





Iluka Resources - Jacintha Ambrosia Mine

Work Health and Safety

Transition to new Work Health and Safety (WHS) laws, including the release of a Statement of Regulatory Intent aligned to CME advocacy on the need for an educative approach to support the transition and funding provided to CME to support education activities.

Land Administration Act

Ongoing cross-agency engagement on approach and submission on Land Administration Act reform, with diversification leases likely to play a role in the future development of renewable generation and clean hydrogen projects.

Energy policy development

Recommendations made in CME's Western Power 5th Access Arrangement submission being reflected in the draft decision. CME also joined the Minister for Energy's Pilbara roundtable, formed an Energy Transition Working Group for members and participated in the WA Government's Sectoral Emission Reduction Strategy & SWIS Demand Assessment (SDA) processes.

CAPABILITY

In 2022, CME advocacy and efforts resulted in...

The rollout of the **Digital Technologies program** in the South West and Pilbara in collaboration with the Resources Challenge pilot founding members. CME secured WA Government funding for the further expansion of the program.

A **proactive industry response** to revelations of sexual assault and harassment in our sector from the **parliamentary inquiry's Enough is Enough report**. CME, together with our members, led action to implement recommendations before the final report was handed down.

Two successful **Mine Emergency Response competitions**, highlighting the core safety skills evident in the Goldfields region. Attendance by the Head of the European Safety Commission highlighted the global benchmark set by Australian mines rescue safety.

Increased awareness of labour market challenges in WA through participation in the **Commonwealth Jobs and Skills Summit** process including in pre-summit roundtables hosted by the Federal Resources Minister. CME advocacy led to Summit outcomes recommending streamlining and reform of Australia's migration system.

Completion of a project by the **LNG Jobs Taskforce** to improve the quality and efficacy of how **LNG process operators** are trained through the development of teaching, learning and assessment material for 15 new units of competency with the Resources Industry Training Council (RITC) providing support.



Asta Morton and the Digital Technologies Program



Mine Emergency Response competition



The delivery of high-profile events such as the **2022 Women in Resources Awards dinner** and **Inspiring Girls** forums to recognise the leadership and proactive work in promoting diversity and inclusion and across the sector.

Selection of CME's CEO as one of the **Agents of Change** for the WA Government's 16 Days campaign to raise awareness of Family and Domestic Violence.

The launch of the **Driller's Offsider Job Ready Program** thanks to collaboration with key industry partners and the Resources Industry Training Council. A total of 33 participants (including 5 female participants) completed the program, of which 17 participants gained employment as a driller's offsider.

The launch of the **Resourceful Mind Program** in partnership with Lifeline WA, following a successful pilot program. This included Lifeline WA being awarded \$700,000 in WA Government funding to support wide uptake of this program across our sector.



2022 KEY EVENTS

| | |
|-----------------|---|
| 6 April | Hon Anthony Albanese MP Dinner |
| 6 April | Hon Keith Pitt MP Dinner |
| 19 April | Hon Scott Morrison MP Breakfast |
| 19 April | Hon Richard Marles MP And Hon Roger Cook MLA Lunch |
| 12 May | Women in Resources Awards Finalists Breakfast |
| 27 May | Women in Resources Awards Dinner |
| 29 June | Lunchbox Learnings – What a Labor Government Will Mean for WA |
| 19 July | CME and AMEC Mine Safety Management System Perth Workshop |
| 25 July | Lunch with Kate Jenkins, Sex Discrimination Commissioner |
| 3 August | Inspiring Girls Careers Forum |
| 11 August | CME and AMEC Perth Person Conducting a Business or Undertaking (PCBU), Work Health and Safety Event |
| 1 September | Women in Resources South West Sundowner |
| 15 September | Breakfast with Mark Thirlwell, AICD Chief Economist |
| 15 September | Women in Resources Pilbara Sundowner |
| 19 September | Launch of Digital Technologies Program in the South West |
| 21 September | Digital Technologies exhibition at It Takes a Spark! Education conference |
| 12 – 14 October | Pilbara Familiarisation Tour – State & Federal Government |
| 19 October | Lunchbox Learnings – Pathways to the Boardroom |
| 8 November | State Director General and CME Executive Council Dinner |
| 24 November | Chief of Staff & Advisory Board Dinner |
| 6 December | Member Christmas Cocktails |
| 7 December | Digital Technologies Program Teacher Professional learning workshop |

Women in Resources Awards

27 May



Lunch with Kate Jenkins

27 July



Inspiring Girls Careers Forum

3 August



Member Christmas Cocktails

6 December



CME MEMBERS (as of 31 December 2022)

Ordinary Members

29Metals
Albemarle
Alcoa of Australia
Alinta Energy
Alkane Resources Ltd
AngloGold Ashanti
APA Group
API - Australian Premium Iron Joint Venture
Atlas Iron
Australian Gas Infrastructure Group
Bardoc Gold Limited
BBI Group
BCI Minerals
Belleveu Gold Ltd
BHP
ByrneCut Australia
CalEnergy Resources Limited
Cameco Australia
Cape
Capricorn Metals Ltd
Chalice Mining Limited
Chevron Australia
CITIC Pacific Mining Management Pty Limited
Clough
Cockburn Cement
Covalent Lithium
Dacian Gold
De Grey Mining Limited
DEVELOP Global
Doral Mineral Sands
Evolution Mining
Fortescue Metals Group Ltd
Gascoyne Resources
Gold Fields
Gold Road Resources
Hastings Technology Metals Limited
Iluka Resources
INPEX Australia
InterContinental Energy
Karora Resources
Lynas Rare Earths
Macmahon
Minara Resources Pty Ltd
Mineral Resources Limited
Monadelphous
Mount Gibson Iron Limited
Newcrest
Newmont Australia
Northern Minerals
Northern Star Resources
Norton Gold Fields Pty Ltd
Orica
Pantoro Limited
Perenti Group (Barmenco)
Pilbara Minerals
Podium Minerals Limited
Poseidon Nickel
Premier Coal
Ramelius Resources
Regis Resources
Rio Tinto
Rosslyn Hill Mining Pty Ltd
Roy Hill
Santos
Sheffield Resources Limited
Shell Australia
Simcoa
South32
SRG Global
St Barbara Limited
Superior Gold Inc
Talisson Lithium Pty Ltd
Theia Energy
Thiess
Thunderbird Operations
TransAlta Energy
Woodside Energy
Yara Pilbara Fertilisers



Rio Tinto - Brockman 4 Mine

Associates

ABC Refinery
 AECOM Australia
 Allens
 Alliance Airlines
 Arc Infrastructure
 Ashurst
 Aspen Medical
 Astill Consultants
 ATCO Group
 Aurizon
 Austin Powder Australia
 BDO Australia
 Bis Industries
 Blackbox Control
 Bright Group
 Callidus Group
 Carey Group
 Central Regional TAFE
 Citadel Medical
 Clayton Utz
 Clifford Chance
 Compass Group (Australia)
 Construction Training Fund
 Corporate Affairs Australia
 Corrs Chambers Westgarth
 Cyber CX
 Deloitte Touche Tohmatsu
 Dug Technology (Australia) Pty Ltd
 Dyno Nobel
 EBM Insurance
 Edith Cowan University
 Engeny Australia
 ERGT Australia
 EY

Fenner Conveyors
 Fleetwood
 Fremantle Ports Authority
 GHD
 GR Engineering
 GRA Partners
 Herbert Smith Freehills
 Hexion
 Hogan Lovells
 IMDEX Limited
 Integrate Sustainability
 IOR
 JBS&G Australia
 JLL
 Kimberley Marine Support Base (KMSB)
 King & Wood Mallesons
 Kingston Reid
 KPMG
 Lycopodium Limited
 M & M Walter Consulting
 Mader Group
 Mapien
 McGarry Associates
 Mills Oakley
 Minprovis
 MinterEllison Lawyers
 Mitsui Iron Ore
 National Jet Express
 North Metropolitan TAFE
 OccuMED
 OMSB
 Paull & Warner Resources
 People Solutions Australasia Pty Ltd

Perth Airport
 Pilbara Ports Authority
 Port Hedland International Airport
 Primero
 Programmed
 PwC
 Qantas Airways Limited
 Ramboll Australia
 RED OHMS Group
 ReGen Strategic
 Resource Capital Funds
 Safe Watch Global
 Schlam
 SEC Newgate Australia
 Sodexo Remote Sites Australia
 Talis Consultants
 The Perth Mint
 Tranen Revegetation Systems
 Tronox Management
 Umwelt
 Virgin Australia Regional Airlines
 Volt Power
 Wallis Drilling Pty Ltd
 Western Environmental
 Western Power
 Work Health & Safety Foundation
 Workforce Services Pty Ltd
 WSP

Small Business Associates

FMR Investments Pty Ltd
 Gold Security Group (International) Pty Ltd
 Pybar Mining Services Pty Ltd
 Regal Engineering Pty Ltd



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