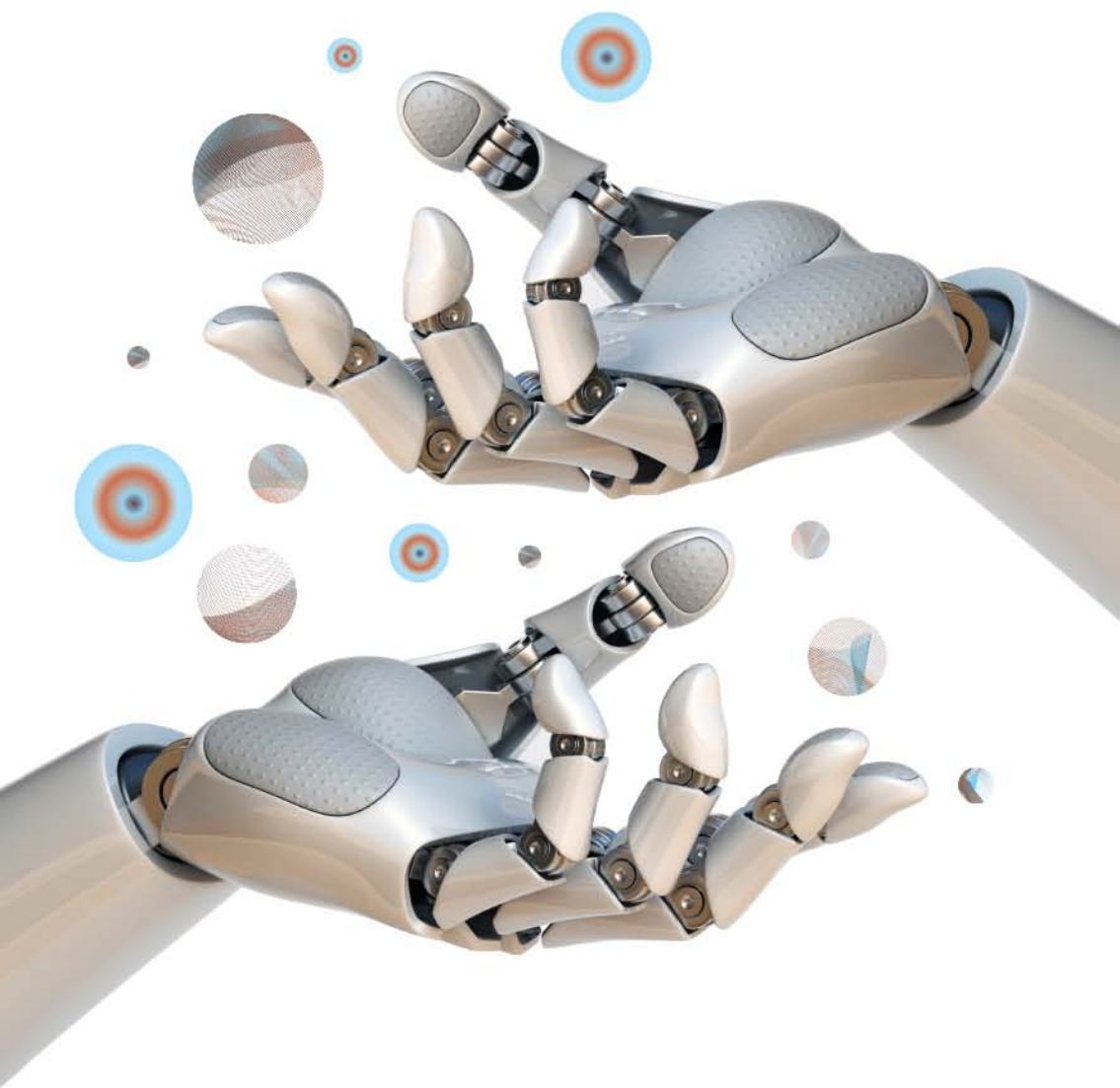


your life, your future

*powering ahead with south australian resources*



South  
Australian  
Chamber  
Of  
Mines &  
Energy

2024 vision 



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*"Today, the resources sector earns  
more export income for Australia than  
all other industries combined."*



**Rebecca Knol**  
*Chief Executive Officer*  
South Australian Chamber  
of Mines and Energy

**The resources sector is at an important point in its history.**

Our sector was born in 1840 when silver and copper were discovered in South Australia and since then, we have benefited from a long history of investment, strong commodity demand and new technology which have helped to create a strong and resilient industry.

From the bronze age, through industrialisation and into the technology revolution, our sector has not only underpinned innovation, it has fuelled it. The resources sector provides the materials that are allowing the world to push the boundaries of science.

Today, the resources sector earns more export income for Australia than all other industries combined and generates more than half of our country's total exports.

**Closer to home, in South Australia the resources sector underpins the State's economy and contributes to 33 per cent of the State's exports, helping to fund our schools, hospitals and roads.**

Resources companies in South Australia employ over 26,000 people directly and indirectly in highly paid, highly skilled jobs. Our workforce earns wages that are 64 per cent higher than the average for all other industries.

These impressive statistics are not the result of luck. Our sector has been shaped by creative, skilled and driven individuals who work together to harness and create new technologies.

However, a bright future for our sector is not guaranteed. Investment in exploration for new deposits is currently at a low point. Populist activism is shaping public perception and we face a growing skills gap as fewer young people look to the resources sector for employment and training.

This document is the culmination of strategic planning undertaken by South Australia's most prominent resource sector leaders – SACOME's Council. It aims to map a path forward for the sector.







**Vision 1** Future industry

**Vision 2** Strong support

**Vision 3** Sector of choice

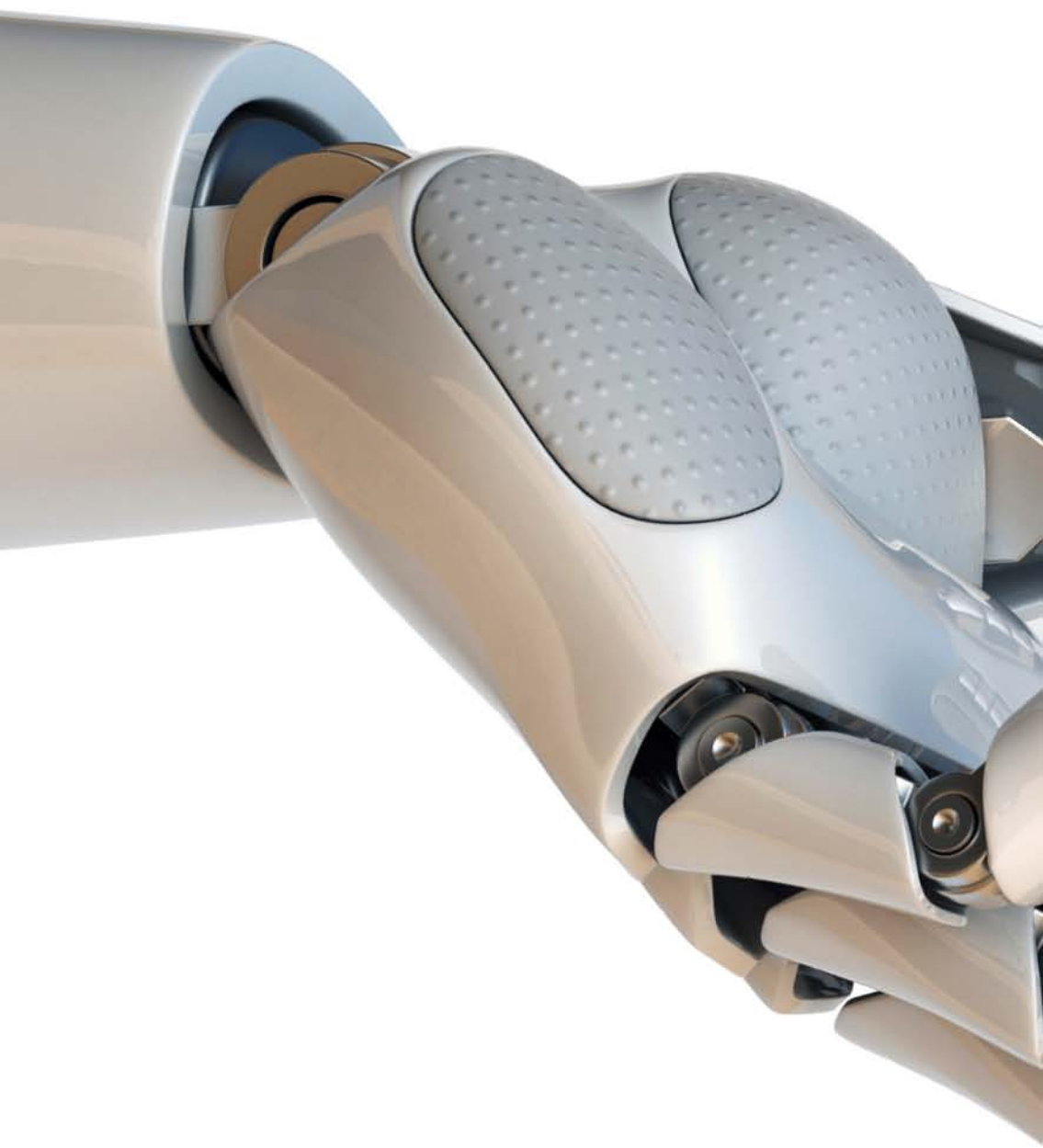
**Vision 4** Recognised contributor

**Vision 5** Supporting regional communities

**Vision 6** Socially and environmentally responsible

**Vision 7** Profitable and resilient









# now

Confidence has returned.  
Momentum is here.  
New energy, new ideas.

There's a  
lot to be  
bold about

*The resources sector makes a substantial contribution to South Australia's prosperity and resilience. The pioneering spirit of the resources sector has fuelled South Australia's economic growth at every stage from pick-and-shovel mining at Glen Osmond in the 1840s, to the development of major projects like the Cooper Basin and Olympic Dam.*

Today that same bold spirit is transforming South Australia's economic landscape. Australia's largest copper deposit is being developed into the Carrapateena mine while BHP is working on growth studies for a potential expansion of Olympic Dam.

The upper Spencer Gulf is experiencing economic revitalisation as GFG transforms the Whyalla steelworks into one of the world's largest steel plants.

With momentum, confidence and energy, the resources sector is very much an industry of the future. It is dynamic and innovative, it embraces change and leads the way in areas such as environmental management, stakeholder engagement, community development, transparency and disclosure.

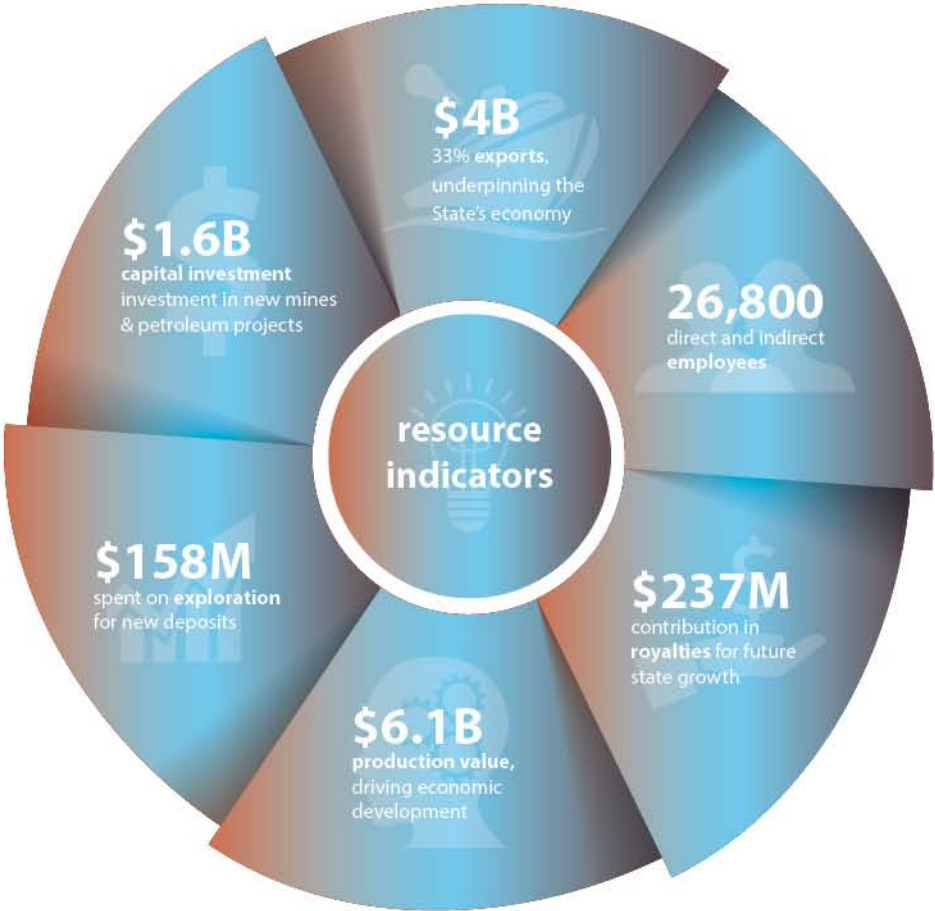
*Resources companies have always been at the cutting edge of technology and innovation. Automation, robotics and artificial intelligence will enable our sector to remain leaders in global technology while we provide the resources to enable technological growth.*



now



The  
numbers  
stack  
up





# now

“Over the next five years, royalty payments alone will contribute \$1.2 billion to our economy – enough to build more than 47 regional schools”

The resources sector underpins the State economy and has contributed to the rise in living standards, the development of infrastructure and prosperity in our State.

The sector pays millions of dollars to the State Government each year in taxes and royalties.

***Over the next five years, royalty payments alone will contribute \$1.2 billion.***

That is enough money to build more than 47 new schools in regional South Australia.  
(Note: at a cost of \$25 million per school)

# Leading the way by example

*The resources sector is more diverse than ever before, as new skill sets emerge in areas of research, exploration, technology, logistics and production. It is forward thinking and there's an unwavering perseverance in breaking new ground.*

Our sector has been instrumental in advancing manufacturing, defence, agriculture and countless other processes that improve the way we live and work.

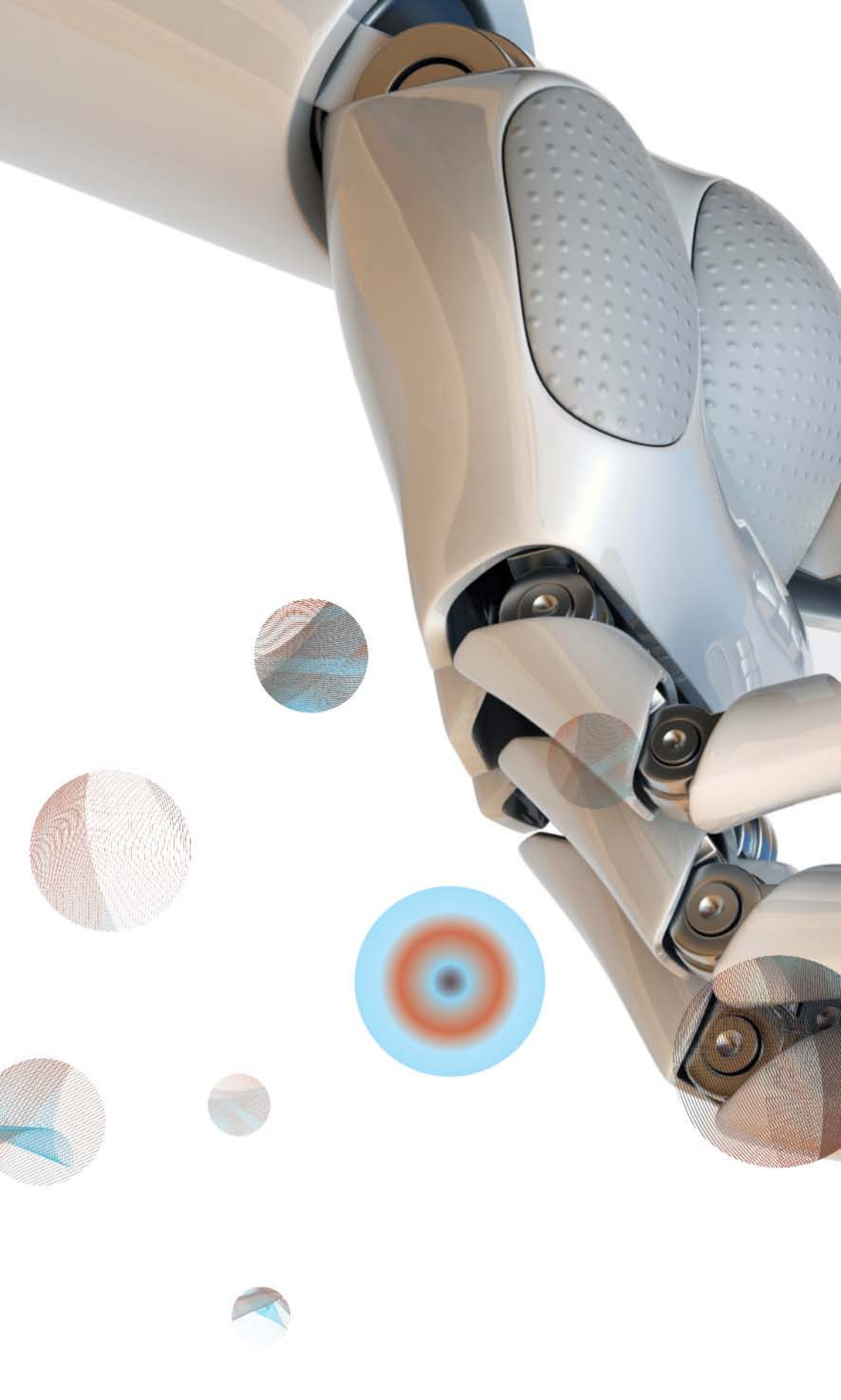
As technology progresses, we will see far greater advancements in the way we work and live, bringing greater prosperity and a better quality of life to everyone.

However, the new age has also brought challenges. Activism, silent majorities, and political fragility have created an environment of mistrust and uncertainty that has underplayed the vital contribution the resources sector makes to the overall prosperity of South Australia.



now









# ahead

A determination to be dynamic.

Belief validated by action.

Ahead is a world of opportunity.

# Strategic investments





# ahead

What lies ahead is not radical change.

It's about continuing to lead the way, to showcase the many benefits the resources sector brings to South Australia in a voice that inspires engagement.

To secure the future prosperity and success of this vital industry, the sector needs to work together and make a number of strategic investments:

- 1 *Land access*
- 2 *Communication*
- 3 *Community engagement and development*
- 4 *Transparency and disclosure*
- 5 *Inclusion and diversity*
- 6 *Electricity affordability*
- 7 *Infrastructure*



## Strategic investment 1

### Land access

*Beach Energy is deeply invested in engaging with communities, minimising impact on landowners, recognising their relationship to the land and tailoring solutions for individual landowners. In particular, in the State's South East, where it is seeking to develop natural gas supplies for the region.*

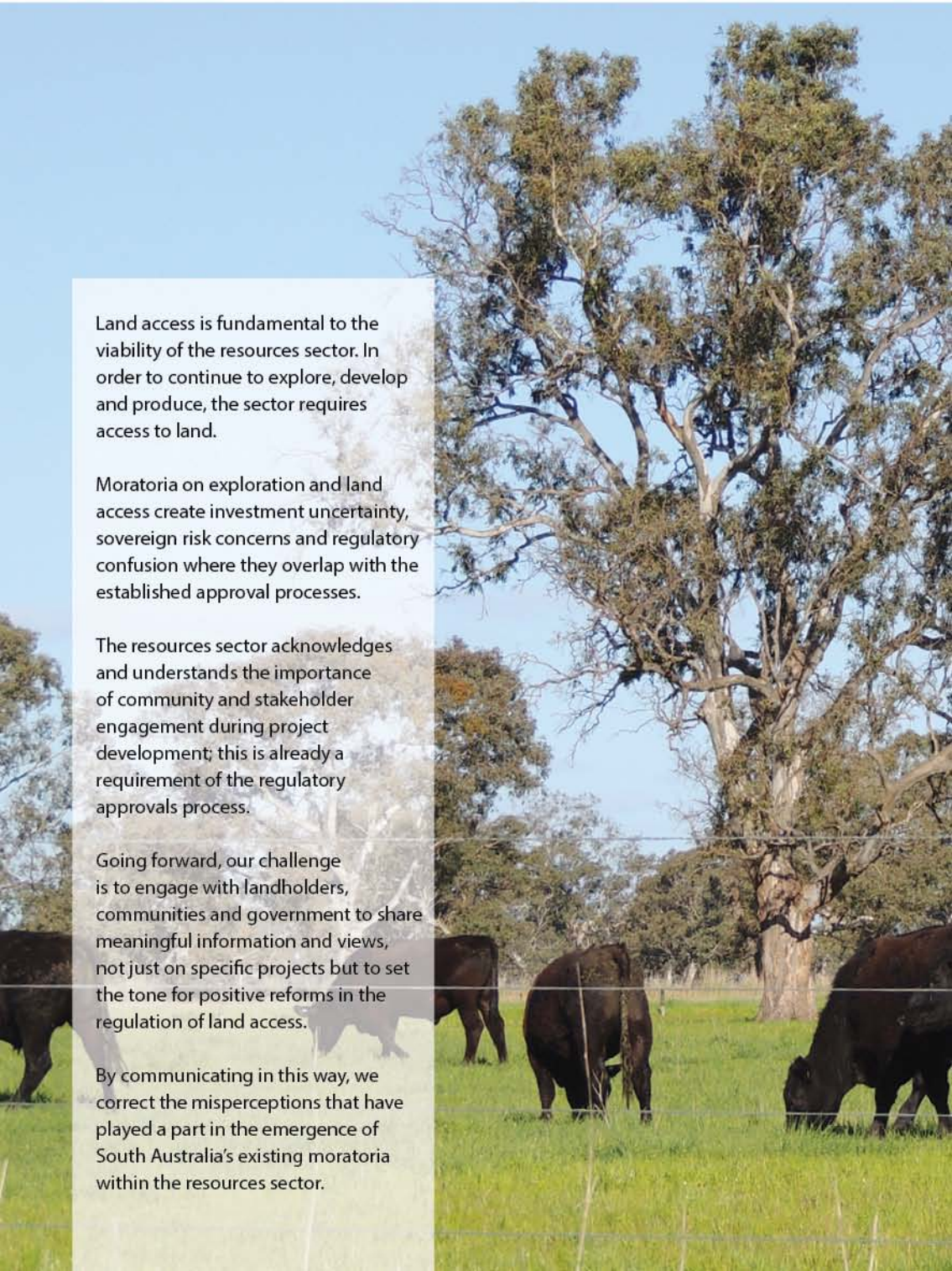
Land access is fundamental to the viability of the resources sector. In order to continue to explore, develop and produce, the sector requires access to land.

Moratoria on exploration and land access create investment uncertainty, sovereign risk concerns and regulatory confusion where they overlap with the established approval processes.

The resources sector acknowledges and understands the importance of community and stakeholder engagement during project development; this is already a requirement of the regulatory approvals process.

Going forward, our challenge is to engage with landholders, communities and government to share meaningful information and views, not just on specific projects but to set the tone for positive reforms in the regulation of land access.

By communicating in this way, we correct the misperceptions that have played a part in the emergence of South Australia's existing moratoria within the resources sector.





# ahead



## Strategic investment 2

# Communication

*BHP has undertaken a prominent national campaign to highlight the importance of Australian resources to our everyday life and economic future. One of the series focuses on Olympic Dam as a significant producer of the copper used in electric vehicles, energy infrastructure (especially renewables), transport and construction across the Asia Pacific region.*

The resources sector makes a substantial contribution to society, but when it comes to sharing the stories of these contributions, we often undersell our achievements.

There are many areas where the resources sector is a leader - such as stakeholder engagement and consultation, indigenous employment, environmental and safety management - but they are such a standard part of operations that we often don't communicate them more broadly. Unwittingly, we've created a vacuum in public debate and a situation where the value of the resources sector is not fully appreciated.

Against this backdrop, it's difficult for corporations and political leaders to articulate the need for major economic developments or to explain the regulations, management systems and environmental controls that are in place to ensure a development is managed appropriately to safeguard the natural environment and community interests.

To keep powering ahead, communication must be a strategic priority for the resources sector.

The South Australian community needs the details so public debate can rise to the occasion and grapple with the complexity of state economic development, long term resourcing of modern society and the industrial landscape of the future.





# ahead



### Strategic investment 3

## Community engagement and development

*The Mining Minds and Time for Wellbeing programs are examples of a new generation of community partnerships that are funded by BHP but driven by local communities. Mining Minds is focused on education, including childhood, adult and leadership education, while Time for Wellbeing is a community health and wellbeing program.*

A group of young women, likely students or community members, are working in a workshop. They are wearing yellow high-visibility shirts. One woman in the foreground is smiling and looking towards the camera. Another woman is working on a wooden project. The workshop has wooden workbenches and various tools and materials.

The resources sector has invested heavily to support regional communities and has helped to develop community partnerships to address fundamental social issues, improve quality of life, and build community capacity.

Going forward, learning, improving and expanding this community support remains vital.

The community partnering ethos extends from education and community health to indigenous training and education and programs that maximise local business participation.




# ahead



## Strategic investment 4

# Transparency and disclosure

*Hillgrove Resources instigated the formation of the Kanmantoo Action Group to monitor dust and measure impacts on community health and lifestyle. Data was independently supplied to the group from the laboratory. Known as 'fingerprint free' data, this approach engendered trust and set a new standard of disclosure and transparency.*



For decades, the resources sector has led the way in disclosure and engagement with all interested parties from government to individual families to activist groups and NGOs.

The resources sector has implemented corporate reporting initiatives in areas such as health and safety, sustainability, community and climate change that have transformed global reporting in other sectors.

The sector continues to develop proactive and engaging approaches to transparency and disclosure.



# ahead






## Strategic investment 5

# Inclusion and diversity

*At Jacinth-Ambrosia, Iluka Resources has partnered with the Far West Coast (FWC) Aboriginal Corporation through the FWC Iluka Liaison Committee to deliver positive socio-economic outcomes. As a result, Jacinth-Ambrosia operations has achieved a rate of Aboriginal employment at or above 20% for the past five years.*



Improving the diversity of the workforce is a key issue for the resources sector and a critical element in attracting the best and brightest minds to the resources industry, now and in the future.

There are a number of areas in which the resources sector is leading the way. From indigenous employment, attracting skilled migrants from overseas and closing the gender gap, the resources sector continues to invest heavily in this space.

Indigenous employment is a key focus for the resources sector, sharing the economic benefits of resource development and building long-term individual and community capacity.

The resources sector has always recruited qualified migrants and continues to support multiculturalism in the sector.

Ahead is the challenge to further close the gender gap and increase indigenous and skilled migrant participation in the workforce.



# ahead



## Strategic investment 6

### Electricity affordability

*In the Cooper Basin, Santos has commenced an innovative project to convert 56 oil well pumps to use solar power instead of crude oil. If this first stage successfully commercialises the use of solar battery technology, Santos will consider converting all of its beam pumps.*





# ahead

Energy security and affordability are major issues for the resources sector.

Resources companies are major consumers of electricity but are also a driving force to deliver reliable affordable power for the whole of the South Australian community through major energy investments and energy infrastructure.

Ahead is the challenge of cohesive national policy, climate change, alleviating supply constraints and increasing storage options. Integrating renewable energy and finding pathways to market for critical battery minerals will also assist in easing the disruption to energy markets that are driving up the cost of electricity for all.

Not only is it incumbent upon the resources sector to lead the way in electricity affordability, it is in our best interests to do so.

## Strategic investment 7

### Infrastructure

*The duplication of the Joy Baluch Bridge is an example of a major infrastructure project that will benefit both the resources sector and the wider community. SACOME worked in partnership with the SA Freight Council, RAA and Port Augusta Council to successfully lobby the State and Federal Governments to fund this \$200 million project.*





# ahead



Road, rail, port and power infrastructure are critical for the development of resources projects, particularly for greenfield resource provinces.

The scope and investment is significant, and it's not just resources companies that benefit. By opening up remote areas of South Australia, the resources industry has created lifelines for many remote communities.

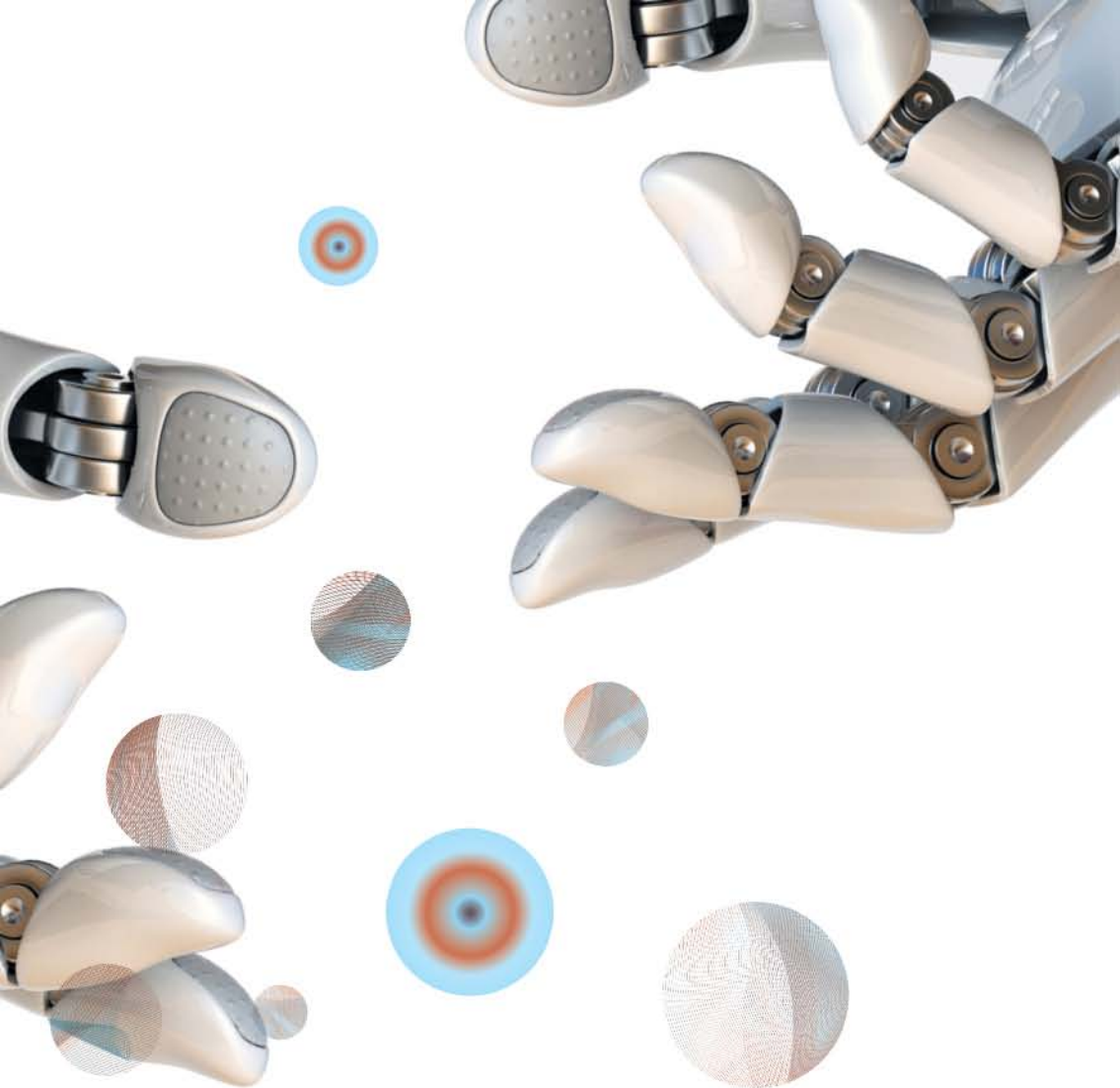
South Australia needs a planned approach with long-term focus and industry-government collaboration to develop a South Australian Resources Infrastructure Plan, underpinned by analysis of province development options.

To keep powering ahead, infrastructure will continue to play a critical part in connecting the resources sector to the world, and the world to regional and remote communities.

These strategies aren't meant to be viewed in isolation. They are part of the big picture that lies ahead; one where the resources sector is viewed as a valued contributor to the economy and the environment.








# 2024 vision

In partnership with communities and government.  
Inspired by a new generation.



The South Australian economy has grown, and will continue to grow, with important contributions from the resources sector.


*The visions for the resources sector are not speculative proposals, but are realistic and achievable ambitions.*

Without the resources sector, there would be no renewable energy (no steel for the wind turbines or glass for the solar panels); no technology (over 40 minerals are used to make mobile phones); no gas to cook with (one-third of Australians say they couldn't live without their gas cooktop) and no agriculture (the equipment required to reap the harvests and transport the goods would not exist).

It is to the benefit of every South Australian that the resources sector is profitable; that it is supported by communities and governments; that it is recognised as an instigator of innovation; that it is seen as a desirable employer for our most talented minds; that it continues to have positive impacts on regional communities and be environmentally responsible.



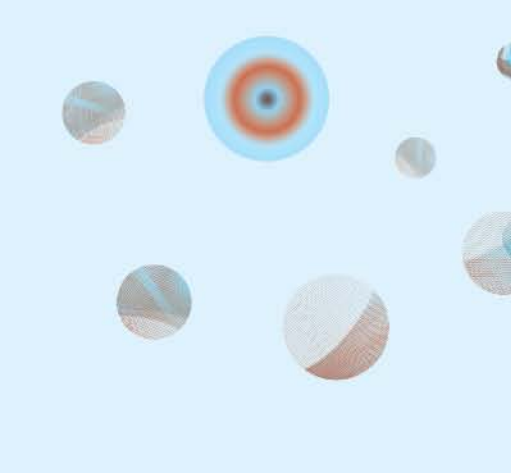
## Future industry



*Recognised as  
an industry of  
the future*

The resources sector is challenging by its very nature; it requires people to be intrepid, adventurous and resilient. It is a dynamic industry, at the cutting edge of innovation and technology, always reaching for new and better ways as it adapts and advances into the future, bringing prosperity to South Australia.

The sector in South Australia has been around for decades, it will be around for decades to come.





# 2024 vision



## Strong support

*Strong support at  
both Government and  
community level*

The resources sector has never been more regulated, and the desire to instil best-practice corporate citizenship has never been stronger. However, activism has never been more influential and people are more connected (emotionally and electronically) to the environment. As the majority of supporters remain silent, fiction can become fact, and the resources sector is portrayed in an unfavourable light.

To redress the balance, to be valued and respected, requires a shift in attitude; to be more engaging and to inform. Transparency engenders trust, and trust is the catalyst for change.

The sector also requires openly endorsed political support.



## Sector of choice

*Sector of choice  
for employment*

The resources sector is currently not a sector of choice. Admissions to world-leading South Australian universities have dwindled and a skills gap is emerging and growing at pace. Perceptions of the sector have not kept pace with its performance.

Changing these perceptions starts in schools, teaching students the history of resources in South Australia, the achievements and the critical role the sector plays in the State's economy. It's about identifying talent, and offering career pathways through all manner of courses, from technology and engineering to human resources and environmental studies. The educational process extends to university personnel, engaging with faculties about the multi-faceted nature of today's resources sector.

The enthusiasm and idealism of the next generation will drive the resources sector into the future.



## Recognised contributor

*Recognised as a valued contributor to the South Australian economy*

The resources sector underpins the economy of South Australia. Its contribution is massive, not only to the State, but to communities, families and individuals.

Much of what is contributed goes unrecognised by the general population, and there is a disconnect between the resources used in everyday life, and the industry that discovers, develops and produces them.

These perceptions are largely the result of a new generation of activism, centred on the environment and climate change.

To be recognised for the contribution to renewable energy and sustainability, the resources sector needs to get better at telling its stories and successes. Not just big copper or gold discoveries, but the everyday stories that have touched communities, helped turn around the lives of individuals or helped to build our State's new space centre, hospitals and roads.



## Supporting regional communities

*Positively impact and support regional communities*

The resources sector has always supported regional communities.

It has been at the forefront of developing infrastructure, providing services, working with indigenous people, directly funding and building schools, providing better access to healthcare, sponsoring sporting clubs, injecting money into the communities and sustaining (or creating) livelihoods.

The resources sector will continue to recognise the importance of healthy, vibrant regional communities.

# 2024 vision



Socially and environmentally responsible

*Continued social and environmental responsibility*

The resources sector is much maligned for its environmental impact. The sheer scale of operations makes for dramatic visuals that feed this misconception. In truth, the resources footprint is negligible, accounting for less than 0.1 per cent of land use in Australia.

In addition, the sector is bound by robust laws and regulations, not only to mitigate environmental impact, but to make the workplace as safe as possible. It is something the sector applauds and is committed to.

The effect of such regulations, and, indeed, the drive from industry, have seen a dramatic improvement in safety and environmental management over the last 30 years.

Innovation and technology are removing the human element from dangerous situations, and making processes safer, more efficient and cleaner.



Profitable and resilient

*Profitable and resilient for the benefit of all South Australians*

The resources sector is part of the human condition; to explore and discover. It's been a part of South Australia since shortly after Foundation and was integral to Adelaide establishing itself as an independent, self-determining colony.

Since that time, there have been booms and busts, successes and failures – that is the cyclical nature of resources. But the sector has proven to be both profitable and resilient.

The sector has not been superseded by technology. In fact, it has enabled the development of technology. The workforce has also adapted and evolved with the times.







## photo credits

### **Page 7**

*Kanmantoo Copper Mine  
Tom Roschi Photography*

### **Page 11**

*Olympic Dam  
Image courtesy of BHP*

### **Page 15**

*Camla Rochat, Prominent Hill Mine  
Image courtesy of OZ Minerals*

### **Page 21**

*Glenn Toogood  
Image courtesy of Beach Energy*

### **Page 23**

*Electric car  
Image courtesy of BHP*

### **Page 25**

*Roxby Downs Area School  
Image courtesy of BHP*

### **Page 27**

*Kanmantoo Copper Mine  
Tom Roschi Photography*

### **Page 29**

*Jacinth-Ambrosia  
Image courtesy of Iluka Resources*

### **Page 31**

*Moomba  
Image courtesy of Santos*

### **Page 41**

*TRY EA Brazil  
Image courtesy of Equinor*





