



PARLIAMENT OF AUSTRALIA
JOINT STANDING COMMITTEE ON TRADE AND INVESTMENT
GROWTH
INQUIRY INTO THE PRUDENTIAL REGULATION OF
INVESTMENT IN AUSTRALIA'S EXPORT INDUSTRIES

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About AusIMM

The Australasian Institute for Mining and Metallurgy (AusIMM) is the peak body for resources professionals, with over 13,000 members across more than 110 countries. Established under Royal Charter in 1893, we represent professionals across all levels of the mining industry, working from exploration through to delivery, and in disciplines ranging from mining engineering to geoscience, health and safety, finance, government and academia.

We lead the way for people in resources, supporting professionals to provide enduring benefits for the community. We are committed to upholding ethics, codes and standards in resources and delivering the highest quality of professional development to the sector.

As the trusted voice for resources professionals, we exercise shared leadership for the advancement of our sector and global community. We advance our sector's continued technical and professional leadership on the global stage, champion community understanding and support for the sector, and work with governments to design, implement and maintain regulatory frameworks that facilitate the continued economic and social contributions delivered through mining.

Submission

Australian mining is the nation's largest export industry. The sector generated \$283 billion in export revenue for the Australian economy and community in the 2019-20 financial year, accounting for more than 60% of the nation's overall export revenue. This contribution will continue well into the future, with export revenue projected to increase to \$296 billion in the 2020-21 financial year.

Australian mining is poised to capture growth opportunities from the COVID-10 recovery and continue its vital contributions to technological and industrial advancement worldwide. Our sector plays a fundamental role as an employer across our cities, towns and regions, hub for technological innovation, enabler of increased industrial capacity, and exemplar of Australian excellence on the global stage.

This submission is in response to the inquiry currently being undertaken by the Joint Parliamentary Standing Committee on Trade and Investment Growth (Committee) into the prudential regulation of investment in Australia's export industries (Inquiry). The Terms of Reference for the Inquiry outline four areas of particular focus:

1. The existing and future contributions of Australia's export industries
2. The investment guidance provided by Australia's financial regulators in relation to investment in Australia's export industries;
3. The approach and motivations of financial institutions, including banks, insurers and superannuation funds, as well as publicly listed companies, to their investment in Australia's export industries; and
4. Any other related matter.

In this submission, AusIMM respond to points one and four in the Inquiry's terms of reference. We highlight the economic and social contributions made by the resources industry and bring to the Committee's attention the importance of ensuring the highest standards of professionalism and technical excellence in resources as means of ensuring that continued contribution.

While Australia benefits from both political and economic stability, global investors are increasingly attuned to the importance of sustainable workforce supply, social and environmental responsibility, professional standards and community sentiment in making investment decisions. We highlight these themes in our submission, emphasising to the Committee that co-ordination action across government, industry, academia and the professions is critical to foster a sustainable resources sector and deliver continued benefit to the community.

The existing and future contribution of Australia's export industries

The Australian resources sector is the leading global provider of commodities essential for all aspects of modern life, and plays a fundamental role in economic growth, development and social prosperity around the world.

In 2019-20, Australian mining accounted for 60% of the nation's export revenue, generating more than \$283 billion in export earnings. Australian mining export revenue is forecast to grow to a record \$296 billion as the global economy continues to rebound from the impacts of the COVID-19 pandemic.¹ The stability of Australian mining throughout the COVID-19 pandemic, and a clear pathway of continued growth, highlight the sector's important role in providing:

- **Employment** opportunities that are long-term, well-paid, diverse and expanding
- **Economic growth and resilience**, underwriting the prosperity not only of rural and regional economies, but of the national economy.
- **Innovation** in technology, talent, standards and practices that strengthen Australia's global position and yield benefits extending across a range of industries and sectors

AusIMM provide further information on these important contributions below.

The resources sector provides diverse, high-quality, long-term employment

Employment and remuneration

The latest employment data from the Australian Bureau of Statistics (ABS) shows the continued strong growth of employment in the resources sector over 2020, with 22,000 new jobs added in the three months to November 2020. This brings the total number of Australians working in resources to 264,000. The recent boost reflects the continuity of long-term employment growth in the sector, which has increased at an average rate of 21.4% over the past five years.²

Indeed, the strength of resources sector employment is even clearer after accounting for direct and indirect employment. A 2017 study by Deloitte Access Economics found that the combined mining and mining equipment, technology and service sectors support approximately 1.1 million jobs, which at that point was four times greater than the direct mining workforce.³

The latest ABS data also points to the quality of employment in the resources industry, with mining industry workers the highest paid in Australia, earning an average weekly income of \$2,663.20. This figure is 53% above the national average. Throughout 2020, the mining sector also enjoyed almost full employment, with 96.5% of the workforce in full-time employment, relative to a 68% full-time share of overall Australian employment.⁴

These trends are reflected in results from the *AusIMM Professional Employment and Remuneration Survey 2020*, which offers insights into the employment, remuneration and experiences of professionals working within the Australian mining workforce. The Survey provides direct insights on professional cohorts within the broader workforce, including people working in

1 Australian Bureau of Statistics (ABS), January 2021, 'International Trade in Goods and Services, Australia', Cat. No 5368, Canberra: available at: <https://www.abs.gov.au/statistics/economy/international-trade/international-trade-goods-and-services-australia/latest-release>.

2 ABS, March 2021, 'Labour Force, Australia, Detailed', ABS Cat No. 62901, Canberra, available at: <https://www.abs.gov.au/statistics/labour/employment-and-unemployment/labour-force-australia-detailed/latest-release>.

3 Deloitte Access Economics, 2017, 'Mining and METS: Engines of Economic Growth and Prosperity for Australia', available at: <https://www2.deloitte.com/content/dam/Deloitte/au/Documents/Economics/deloitte-au-economics-mining-mets-economic-growth-prosperity-engines-170317.pdf>

4 ABS, November 2020, 'Average Weekly Earnings, Australia', ABS Cat No. 6302, Canberra, available at: <https://www.abs.gov.au/statistics/labour/earnings-and-work-hours/average-weekly-earnings-australia/latest-release#industry-earnings>.

geology, metallurgy, mining engineering, social and environmental sciences, data, technology and management disciplines.

Survey results indicate an uptick in the unemployment rate amongst resources professionals throughout 2020 of no more than 1.1%, relative to an Australia-wide increase of 21.6% in the twelve months to January 2021.⁵ The survey findings also show that this trend of relative low unemployment is constant across all states and territories. Furthermore, survey findings reiterate the strong wage stability offered by the resources sector throughout 2020, with 70% of respondents earning more than \$180,000, and a gender pay gap that continues to trend downwards.

Diverse roles and occupations

In addition to stable employment and high wages, Australians working in the resources sector have access to careers across a range of technical and professional disciplines. The breadth of fields across which resources professionals work reflects not only the continuity of traditional mining disciplines such as geology and mining engineering, but also the rapid emergence and deployment of new skillsets, for example in relation to social performance, data, technology and automation, as the sector continues to evolve and look to the future.

Results from the *AusIMM Professional Employment Survey* again provide further evidence of this growth and diversity. A longitudinal analysis of survey findings shows that since 2015, the proportion of community relations professionals working in mining has increased by close to 5%, while the share of environmental professionals has grown by 6%, and the share of health and safety professionals has grown by more than 9%.

The resources sector is creating new jobs in an ever-expanding range of disciplines.

The resources industry also offers opportunity for people from a range of educational backgrounds. Figures from the National Skills Commission show approximately 31% of the mining workforce have high school as their highest qualification, a further 43% have obtained diplomas or certificates, and approximately 24% hold a bachelor level degree or above.⁶

The sector offers long-term careers pathways for people from all professional and educational backgrounds. The *AusIMM Professional Employment Survey 2020* shows that many professionals who join the sector early in their working lives and educational journey progress to higher qualifications to access further opportunities within the sector, including through honour's, master's and doctorate-level qualifications.

The resource sector supports skills-development, education and economic empowerment for Australians from all backgrounds.

Regional and rural employment

Resources professionals also have the opportunity to ply their diverse skills and expertise all across Australia, from metropolitan and urban areas through to rural, regional and remote communities. The Productivity Commission's study report on *Transitioning Regional Economies* showed that regions with a substantial resources industrial base experienced the highest rates of employment growth in the twelve years from 2005 to 2017. The Productivity Commission additionally found that mining regions benefitted from sustained high employment and wages over

⁵ ABS Cat No. 62901; Australasian Institute of Mining and Metallurgy (AusIMM), 2021, 'AusIMM Professional Employment and Remuneration Survey 2020', Melbourne, available at: <https://www.ausimm.com/bulletin/bulletin-articles/ausimm-professional-employment-and-remuneration-survey-2020/>

⁶ National Skills Commission, 2020, 'Mining', Canberra, available at: <https://www.nationalskillscommission.gov.au/mining>.

both the short and long-terms, concluding that cyclical reductions in commodity values were not a source of significant disadvantage for most regions.⁷

The mobility of the resources workforce (including fly-in, fly-out and drive-in, drive-out workers) also helps to spread the benefits of strong employment across regions, with people living outside mining regions able to access the employment opportunities generated by the sector.⁸

The resources sector underwrites Australia's economic growth and resilience

Economic contributions during COVID-19

Over and above the breadth of sustainable, well-paid and high-quality employment opportunities, the Australian resources sector makes a vital contribution to the national economy. Continuous, safe and efficient operations throughout the COVID-19 pandemic have allowed the resources sector to maintain this vital contribution throughout a damaging economic period.

The resources sector generated more than \$283 billion in export earnings and accounted for 60% of Australia's export revenue over the 2019-20 financial year. National Accounts for 2019-20 also show the resources sector accounts for 10.4% of Australia's Gross Domestic Product.⁹ There are clear signs that this immediate economic contribution will continue, with January trade data showing a 26% uptick in coal exports from Australia,¹⁰ Overall export revenue from Australian resources is set to increase to \$296 billion in 2020-21, with stable high earnings projected through to 2025-26 across iron ore, base metal, coal, gold and base metal commodities.¹¹

Driving regional economic activity and development across the supply chain

The resources sector's substantial direct contributions to regional and rural employment are outlined above. Through direct investments in infrastructure and local procurement, the resources industry additionally helps to build local industry capacity and supports a vast range of small and medium sized business operating across a range of industries in regional Australia, including equipment and labour hire, transport, catering, accommodation and training.¹²

The resources sector is a hub for Australian excellence and innovation

Professional and technical excellence in mining strengthens Australia's global standing

Our resources professionals are amongst the most highly skilled in the world, and our reputation technical and ethical leadership supports Australia's broader standing on the world stage.

Upholding standards and promoting professional best practice on the global stage is a key focus for AusIMM, pursuant to our Royal Charter. We bring to the Committee's attention the leadership and world-first status of Australian mining, as reflected in continued global demand for Australian mining professionals, codes and standards, and professional development and training, as well as the strength global dialogue through the sector.

7 Productivity Commission, 2017, 'Study Report: Transitioning Regional Economies', Commonwealth of Australia, Canberra, available at: <https://www.pc.gov.au/inquiries/completed/transitioning-regions/report/transitioning-regions-overview.pdf>.

8 Productivity Commission, above n 5.

9 ABS Cat. No. 5204.

10 ABS Cat. No. 5368.

11 Office of the Chief Economy, Department of Industry, Science, Energy and Resources, 2021, 'Resources and Energy Quarterly: March 2021', Commonwealth of Australia, Canberra, available at:

<https://publications.industry.gov.au/publications/resourcesandenergyquarterlymarch2021/documents/Resources-and-Energy-Quarterly-March-2021.pdf>.

12 Deloitte Access Economics, above n. 3; Productivity Commission, above n. 5.

Global dialogue through Australian mining

Second-track dialogue through Australian mining plays an important role in driving Australia's trade, economic and broader diplomatic interests worldwide. With this, the global standing of Australian mining professionals is a key driver in attracting investment to the sector.

AusIMM's international engagement activities are guided by an International Advisory Forum, composed of mining and international experts including representatives from peak Australian trade councils and overseas mining associations. We also partner with kindred bodies around the world, including the Global Mining Association of China, and are a lead member of the Global Mineral Professionals Alliance.

This broad engagement gives AusIMM a direct insight into the role of Australian mining in supporting Australia's global position. As noted, we see a particularly strong interest in Australian codes, standards and practices, on which we provide further information below.

In the prevailing geo-political climate, we note the particularly significant diplomatic benefits garnered through resources-led engagement in China, India and the Indo-Pacific. This engagement takes place not only through business-to-business trade in key Australian commodities, but also through the enduring networks and relationships established between professionals work across these jurisdictions.

Our submission below provides further details on the profile of, and demand for, Australian mining professionals, and reference our work to increase recognition of Australian mining excellence on the global stage through international course delivery education. AusIMM has also represented Australian mining professionals in international fora including the Australia-India Business Exchange trade delegation facilitated by Austrade in February 2020.

Australian Mining Professionals on the global stage

The demand for Australian mining professionals is but one indication of the global esteem in which our sector is held. Consider, for example, that more than 20% of AusIMM members routinely work overseas, including across the USA, UK Canada, Indonesia, China, India, Ghana, Brazil, Chile, Peru and South Africa. Of further note is the fact that 23% of AusIMM Fellows (our highest membership grade) are based internationally.

Globally recognised mining codes and standards

The demand for Australian mining experts reflects the global recognition of Australian mining standards, expertise and experience. This global recognition is core to the global position and competitive strength of Australian mining, and AusIMM exercise a leadership role in developing and actively promoting the highest ethical and professional standards on the global stage through a range of codes, standards and professional frameworks including:

- **AusIMM Code of Ethics**, which ensures mining professionals uphold and enhance the global standing of mining professionals, has been translated into Mandarin, and is supported by an established governance framework including By-Laws and Professional Conduct Regulations.
- **AusIMM Social Responsibility Framework**, which outlines professional standards to support the sector's environmental, social, and financial sustainability, and is a world first amongst mining professional associations.
- **JORC Code**, the full denomination of which is the Australasian Code for Reporting of Exploration Results, Mineral Resources and Ore Reserves, which AusIMM co-parent with our partners at the Australian Institute of Geoscientists (AIG) and Minerals Council of Australia and has been translated into Mandarin.
- **VALMIN Code**, the full denomination of which is the Australasian Code for the Public Reporting of Technical Assessments and Valuations of Mineral Assets, also co-parented with the AIG.

With members from across more than 110 countries, AusIMM recognise that the global mining community is keen to align itself with Australian standards of professionalism and technical excellence. We emphasise to the Committee that this global leadership position plays an important role in supporting Australia's broader global standing.

Global demand to learn and be upskilled in Australian mining best practice

As with the demand for Australian mining professionals, codes and standards, the global community also seek out opportunities to discover and be up skilled in Australian mining practices. AusIMM play a key role in increasing the global recognition and uptake of mining best practice, offering a wide range of globally recognised courses and training services to meet this demand.

This is reflected, for example, in the fact that more than 40% of enrolments in our flagship Professional Certificate in JORC Code Reporting are from locations outside Australia and New Zealand. A further example lies in our work with the Global Mining Association of China in 2020 to deliver a five-day training program on the JORC Code in China. AusIMM also established a partnership with the Indian School of Mines in 2020, as part of the Austrade-facilitated Australia-India Business Exchange.

While we cite these examples in relation to the JORC Code, specifically, we also flag sustained growth in international attendance and engagement at AusIMM-hosted mining events. We note a strong emerging interest in Australian practices and innovations across several key themes shaping the future of the global mining industry, such as:

- **Mining technology and innovation**, particularly as they relate to particularly including operational efficiency, waste reduction and environmental performance
- **Mining health and safety**, with Australia occupying a position at the vanguard of continued progress towards a zero-harm industry
- **Sustainability**, including the social responsibility and performance of the sector,
- **The future of the mining workforce.**

Mechanisms to support Australia's continued leadership across these fields will strengthen the contributions of Australian mining into the future, and play an important role in attracting continued investment into the Australian economy.

This submission explores social responsibility and workforce sustainability further, in response to 'Other Matters'.

Australian resources enable technological and industrial development

The latest edition of Geoscience Australia's *Identified Mineral Resources* report reaffirms Australia's position as one of the world's top producers of critical minerals such as lithium, cobalt, manganese, uranium and rare earth elements.

As outlined earlier in this submission, Australia is one of the leading producers of a range of critical minerals. These metal and non-metal elements are pivotal to human society in industrialised and developing economies, with many being irreplaceable inputs for emerging technologies and industrial processes. This is particularly true in relation to renewable energy systems, electric vehicles, rechargeable batteries, telecommunication and a range of consumer electronic and defence technologies.¹³ Australia's critical mineral endowment are also vital for securing the nation's industrial and manufacturing sovereignty, the importance of which has been felt most acutely in an environment of restricted global trade throughout the COVID-19 pandemic.

13 Mudd, G.M., Werner, T.T., Weng, Z-H., Yelishetty, M, Yuan, Y., McAlpine, S., Skirrow, R and Czarnota, K, 2018, 'Critical Minerals in Australia: A Review of Opportunities and Research Needs', Record 2018/51, Geoscience Australia, Canberra, available at: <https://apo.org.au/sites/default/files/resource-files/2019-03/apo-nid225446.pdf>.

There is substantial opportunity to build on Australia's minerals endowment and industrial capacity to attract continued capital investment and create growth in the Australian export market. AusIMM believe Australia has the opportunity to expand domestic minerals processing and value-added manufacturing through the resources sector. We also recognise an opportunity to adapt innovations borne from within Australian mining for use in other sectors, such as defence and space, in turn helping Australia to capture more significant shares of the global market for these products.¹⁴

The professionalism and technical leadership of Australian resources professionals is essential in realising these benefits. AusIMM encourage the Federal Government to pursue policies that encourage continued investment in innovation, skills development and training to support the contributions of Australian resources professionals in both established and emerging mineral commodities. The Federal Government clearly recognise this strategic imperative, as reflected in many of the skills and training-oriented actions flagged in the *Services Export Action Plan* launched by the Minister for Trade, Tourism and Investment in April of this year.

Other Matters: Critical factors for continued resources investment

AusIMM highlight in this submission several factors that are critical to the future of the Australian resources exports, and the attraction of capital investment to enable that activity:

- **Professional standards and best practice**, which are core to the global position and competitive strength of the Australian sector;
- **Continued innovation**, with the sector undergoing rapid transformation as it develops new technological and digital capabilities, shifts towards automated and remote operations, and capitalises on opportunities in emerging global commodity markets;
- **Social responsibility and performance**, with investment decision-makers increasingly recognising the salience of Environmental, Social and Governance factors, particularly community sentiment, when considering project viability;
- **Skills development and workforce sustainability**, with the imperative to establish a sustainable and needs-responsive talent pipeline being recognised as a major challenge for the resources sector.

This submission has earlier provided detail on the important role of professional standards, best practice and innovation in supporting the investment attractiveness and global standing of Australian mining. In the following sections, AusIMM provide a further explanation of social responsibility and performance, skills development and workforce sustainability as critical drivers for Australia's resources industry.

Social responsibility and performance

Environmental, social and governance factors are recognised as being of fundamental importance to the sustainability and financial viability of mining globally, including in Australia.¹⁵ The impacts of social, environmental and governance performance on community sentiment and trust in the credibility of mining operations are reflected in the spread of investment geographically and have a profound impact on sources, availability, time frames and costs for project financing.¹⁶

¹⁴ See for example Australian Government, 2021, 'Resources Technology and Critical Minerals Processing National Manufacturing Priority Road Map', available at: <https://www.industry.gov.au/sites/default/files/March%202021/document/resources-technology-and-critical-minerals-processing-national-manufacturing-priority-road-map.pdf>.

¹⁵ AusIMM Social Responsibility Statement, available at: <https://www.ausimm.com/about-us/governance/social-responsibility-framework-and-statement/>.

¹⁶ AusIMM, 2019, 'Social Licence Policy Development Forum Summary Report', available at: https://www.ausimm.com/globalassets/advocacy/slto_forum_report_final.pdf;

PwC, 2020, 'Aussie Mine 2020: Resources the Recovery'; Mackenzie, S, Everingham, J and Bourke, P, 2020, "The Social Dimension of Mineral Exploration", SEG Discovery No 121. April 2020, pp. 16-28;

Mineral resource development opportunities are likely to be severely constrained unless projects and unavoidable legacies are agreed as being acceptable by affected landholders/custodians in advance.¹⁷ AusIMM is taking the lead in ensuring resources professionals are equipped to meet the highest standards of social responsibility and performance.

We are delivering this leadership through a comprehensive Social Responsibility Framework, consisting of a Social Responsibility Statement, our Royal Charter and Code of Ethics, a Chartered Professional Program for environmental and social performance professionals, and a growing program of professional development offerings to lift awareness, understanding and competency across the mining sector.

AusIMM submit to the Committee that measures such as these are fundamental to attracting continued investment into the Australian resources industry, and in turn to supporting its continued role as the number one source of export revenue for the Australian community.

Continued collaboration across industry, government and academia is imperative to drive this agenda forward.

A skilled and sustainable future workforce

The pace and scale of change in the resources industry has never been greater. The Australian mining industry is becoming more sophisticated, automated and technologically advanced as it develops more efficient operational methods. As the sector evolves, mining professionals will require different skillsets to thrive and maintain Australia's global competitiveness.

This trend of continued development is, however, met by a corresponding suite of challenges around attracting and retaining talent, particularly as Australian miners find themselves in direct competition with employers across a range of other industries. Australia's mining and mining, equipment and technology service (METS) expertise is world-class, and ensuring this continues is critical to facilitate future investment in the industry.

AusIMM recognise several key areas in which action is required, to ensure a sustainable and agile future resources workforce:

- **Forecasting**, to ascertain the future needs of the industry, map expected growth in the resources workforce and identify potential gaps and skills shortages
- **Education, skills and training**, with an expansion of education pathways to diversify progression and entry options across all mining-relevant fields
- **Attraction and retention**, to improve the perception of the resources sector and increase awareness of the breadth of established and emerging career opportunities, as well as the role of mining in providing future economic and social prosperity
- **Equality of opportunity**, which requires the sector to adopt a broad understanding of the diversity that exists within the community, recognise the value of accessing diversity of thought and background within the workforce, and working to increase the inclusiveness of the workforce and industry; and
- **Collaboration**, with co-ordination across industry, government and the education to ensure a cohesive and responsive approach across each of these areas.

These were themes that emerged during the inaugural Resources Education Collaboration Summit, co-hosted by AusIMM with the Victorian Government in 2019.¹⁸ AusIMM are working to

¹⁷ Lebre, E., Stringer, M., Svobodova, K., Owen, J., Kemp, D., Cote, C., Arratia-Solar, A., Valenta, R., 2020, 'The Social and Environmental Complexities of Extracting Energy Transition Metals', *Nature Communications*, available at: <https://www.nature.com/articles/s41467-020-18661-9.pdf>.

¹⁸ AusIMM, 2019, 'Summary Report: Resources Education Collaboration Summit', available at: https://www.ausimm.com/globalassets/advocacy/2020-recs-summary-report_v2.pdf.

address each of these areas through several initiatives, and will be hosting a second Resources Education Collaboration Summit with industry, government and education partners in 2021.

AusIMM emphasise to the Committee that Government has an important role to play in the future of the resources workforce, reflecting the broader responsibility of the government to drive growth in Australia's economy and support job creation through the nation's major industries.

AusIMM commend the Federal Government for developing the *National Resources Workforce Strategy*, which outlines a range of policies and programs through which the Government will support a sustainable future resources workforce. Key action areas are consistent with the imperatives we note above, including technological development, skills and training, technical and professional diversity, and equality of opportunity.

We provide further insights and updates on key areas of action below.

Forecasting: Working Group on the Resources Industry Future Workforce

A key initiative AusIMM has progressed is the establishment of a *Working Group on the Resources Industry Future Workforce*, whose focus over coming months will be on gathering data from universities and industry to forecast supply and demand and map gaps. The Working Group comprises representatives from industry and academia, with an initial body of work focussed on:

- **Devising and supporting a proactive approach** to industry and universities to source accurate data on the supply and demand of graduates for the minerals industry.
- **Guiding engagement** with industry and university stakeholders.
- **Providing insights** and review into the desired types of data for collation from universities and industry.
- **Developing definitions** for the minerals related roles on which data will be sought.
- **Establishing a clear methodology** to guide data analysis.
- **Sharing advice and feedback on initial data analysis**, including its presentation to key stakeholders.

AusIMM strongly encourage further engagement with the Federal Government as this body of work progresses

Attraction and retention: Further insights on youth attitudes towards the resources sector

AusIMM research has also yielded insights into the factors that most affect the attraction of young Australians into the future resources workforce.

Research conducted by AusIMM in collaboration with our industry partners offers particularly salient insights into the factors that attract young people to the industry, and what drives them away. Key findings include that:

- **Certainty:** Few high-school, university and vocational education age students are fixed on a career in a particular industry, with career certainty trending up with education.
- **Awareness:** Knowledge of the resources sector generally varies across jurisdictions, but knowledge of mining careers is extremely low, with 94% of students indicating they know either 'nothing at all' or only 'a little bit' about careers in mining.
- **Association:** Spontaneous associations with mining are generally negative to neutral, with young Australians recognising both the current and future economic contributions made by Australian mining, but having little awareness of the sector's role as a hub for innovation and technological development.
- **Interest:** Low consideration of mining is generally driven by a lack of knowledge, not conscientious objection based on ethical or environmental concerns.
- **Influence:** Key spheres of influence in the career decisions of young Australians are television and online news, school classes, friends and family (particularly parents), and are positively influenced by an increased understanding of the breadth of career

opportunities in the sector, the opportunity to work overseas and across regional and metropolitan locations, and the strong wages offered in the industry.

AusIMM has conducted and championed this research to instruct future government and industry initiatives intended to strengthen and secure the critical talent pipeline for the resources industry, and in turn support the ongoing role of the industry within the community.

We commend the report to the Committee, and invite further engagement with the Federal Government on how this research might be expanded and deployed in the design and delivery of future policies and programs.

Equality of opportunity: Securing the workforce through a diverse and inclusive industry

In this section of the submission, we draw the Committee's attention to the key levers through which the resources industry can be made more diverse and inclusive. We repeat that a diverse workforce and inclusive industry is critical to supporting the continued global standing of the industry, and its status as a viable 'destination' for capital investment.

As the peak professional body for people in resources our focus is on supporting and empowering our members, and through them affecting change in our industry. We draw to the Government's attention four key areas that require a particular focus:

- **Professional and role diversity** across the resources sector.
- **Aboriginal and Torres Strait Islander people** working in resources.
- **Gender and sexually diverse professionals** in resources, including women in mining.
- **Age diversity** of people working and pursuing careers in resources.

At AusIMM, we work to affect change across all levels of industry through:

- **Advocacy:** We raise awareness about diverse attributes, skills and qualities of our professional community and advocate for equality of opportunity in our sector.
- **Education:** We equip all professionals with the tools, guidance and professional development opportunities they need to thrive and drive meaningful change for themselves and all other people working in resources.
- **Insight:** With a global member base and networks spanning industry, government and academia, we undertake research and analysis to identify priorities for action, inform our initiatives, and expand knowledge within the sector and community.
- **Standards:** We expect and promote the highest standards of professional conduct and ethical practice across all areas of practice within our industry, as explored in this submission, including by encouraging members to exercise personal leadership and uphold principles of equity and inclusion.

In relation to insights, particularly, we draw to the Committee's attention several key findings from our annual Women in Mining Survey, which shows that:

- **Perception challenges persist:** Women continue to report that their own workplaces are significantly more inclusive than their perception of the broader resources sector.
- **Amenities are improving:** In the latest survey, 67.0% of female respondents rating amenities as good or very good, an increase of 7.5% on previous years.
- **Travel support is improving:** Reflecting the sector's agility in response to the COVID-19 pandemic, 73.0% of female respondents rated employer support for travel as good or very good, an increase of 10.0% on previous years.
- **Educational pathways must be broadened:** Survey results show, for example, that Aboriginal and Torres Strait Islander women in resources are five times more likely to have high school graduate as their highest form of qualification, compared to the survey average.

- **Diverse leadership is needed:** Leadership is rated by 79.0% of women in resources as being a top priority for diversity and inclusion in the sector, and is identified as a key professional development priority by 55.0% of respondents.
- **Workforce flexibility is a priority:** The on-site experience is improving for many women in resources, but workforce flexibility and support to manage inter-role conflict continue to be key challenges.

As with other focus areas for ensuring a sustainable future resources workforce, AusIMM encourage all levels of government to join us in addressing these challenges. We note the Federal Government has identified several actions under the *National Resources Workforce Strategy*, including AusIMM's own programs.