

MCA - Domestic coal supply

Thursday, 2 June 2022

3:52 PM

Meeting Subject: East Coast Energy

Meeting Date: 2/06/2022 14:45 PM

Location: Telephone

Participants



s22

Notes

- Shortage of international seaborne coal supply.
s47E(d)
 - Weather and COVID-19 impacts.
- In Australia there is a shortage of coal:
s47E(d)
 - Wet weather has impacted some mine production mainly in NSW
 - COVID-19

s47E(d)

s22

From: s22 @minerals.org.au>
Sent: Friday, 3 June 2022 7:15 PM
To: s22
Subject: RE: Domestic coal industry [SEC=OFFICIAL]

s22

Hi

As I said on the phone, I've spoken with two people but haven't been able to contact any others. Marketing people are difficult to contact.

Given your time constraints here are some quick comments.

(A) Supply side constraints

- There is a shortage of international seaborne coal supply. s47E(d)
s47E(d)

- EU banning Russian coal
- The impact of weather and COVID-19 on production.

- In Australia there is a shortage of coal:
s47E(d)

- Wet weather has impacted some mine production mainly in NSW
- COVID-19 leading to absenteeism in the workforce s47E(d)

s45

- Different types of mines have different statutory functions. For example, some are specific to underground coal mines. Only people meeting defined requirements are eligible to be nominated by the mine operator to perform a statutory function. The person must be readily available to exercise and be capable of exercising the statutory function (i.e. they have to be available at the mine site if needed). Only one person can be nominated to hold a key statutory function at any time.
- Examples of statutory officers include:
 - Underground mines: Mining engineering manager, Electrical engineering manager, Mechanical engineering manager, Ventilation officer, Ventilation auditor, Dust explosion control measures auditor
 - Open cut mines: Mining engineering manager, Open cut examiner, Electrical engineer, Mechanical engineer
- s45

s47E(d)

(B) Demand side constraints

s47E(d)

- s45

s47E(d)

, s45

s47E(d)

Regards

s22

From: s22 @industry.gov.au>

Sent: Thursday, 2 June 2022 3:30 PM

To: s22 @minerals.org.au>

Cc: s22 @industry.gov.au>; s22

@industry.gov.au>

Subject: Domestic coal industry [SEC=OFFICIAL]

s22

s22

To Whom It May Concern,

As you would be aware there is currently substantial media around the state of the Australia energy market.

As part of its work to brief the new Australian government on this issue, the Department of Industry, Science, Energy and Resources is seeking industry views on the current state of the Australian coal industry.

We are particularly interested in

Your assessment of the major drivers of the current high thermal coal prices

The impact, if any, of COVID and wet weather on your operations.

If your company has been fielding calls from domestic consumers

An assessment of your company's ability to supply the additional coal to the domestic market and constraints that it might face. (e.g. railing capacity, coal quality mismatch, mining equipment and material supply chain issues, wet weather/water discharge limits, long-term contract commitments.)

I appreciate any assistance you can provide. My contact details (phone and email) are in the signature block below.

Thanks

s22

Assistant Manager

Onshore Resources Division | Commodities and International Branch | Major Commodities Section
Ngunnawal Country, 51 Allara Street (GPO Box 2013) Canberra ACT 2601 Australia
Department of Industry, Science, Energy and Resources

P s22 | s22 | M s22 | E s22 @industry.gov.au

industry.gov.au ABN 74 599 608 295

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Acknowledgement of Country

Our department recognises the First Peoples of this nation and their ongoing connection to culture and country. We acknowledge First Nations Peoples as the Traditional Owners, Custodians and Lore Keepers of the world's oldest living culture and pay respects to their Elders past, present and emerging.



OFFICIAL

s22

From: s22
Sent: Friday, 3 June 2022 1:31 PM
To: s22
Subject: RE: Domestic coal industry [SEC=OFFICIAL]

s22

OFFICIAL

From: s22 @minerals.org.au
Sent: Friday, 3 June 2022 11:39 AM
To: s22 @industry.gov.au>
Subject: RE: Domestic coal industry [SEC=OFFICIAL]

s22

s22

From: s22 @industry.gov.au>
Sent: Friday, 3 June 2022 10:22 AM
To: s22 @minerals.org.au>
Subject: RE: Domestic coal industry [SEC=OFFICIAL]

Morning s22

Further to my email from yesterday, I wondered if you have a contact in the NSW government responsible for coal industry policy that you could share with me.

Also, keen to hear from Centennial so if you had a Centennial marketing desk contact to share that would be great.

Thanks

s22

OFFICIAL

From: s22
Sent: Thursday, 2 June 2022 3:30 PM
To: s22 @minerals.org.au>
Cc: s22 @industry.gov.au>; s22 @industry.gov.au>
Subject: Domestic coal industry [SEC=OFFICIAL]

s22

Thanks
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P s22 [@industry.gov.au](mailto:industry.gov.au)

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OFFICIAL

s22

From: s22
Sent: Thursday, 2 June 2022 9:37 AM
To: s22
Cc: s22 ; s22 s22
Subject: Chat with s22 , Whitehaven [SEC=OFFICIAL:Sensitive]

Hi everyone,

I had a quick catch up call with our contact at Whitehaven to discuss domestic coal markets. While Whitehaven is export focused, it does have some visibility and understanding of what's happening in the domestic market.

Wet weather

- Given Centennial's mines are all underground, not affected by the wet weather.

Export prices / Spot prices

- Confirmed the Newcastle 5500 kcal/kg FOB price sets the domestic spot price.
- I asked if supplying domestically would lead to cheaper transportation costs – said no given rail take or pay contracts means producers will demand the export price, otherwise losing money.

Availability of coal

- Indicated the market is tight, and coal availability is limited for both domestic and export customers.

s22

Commodities and International Branch
Onshore Resources Division
Department of Industry, Science, Energy & Resources
Ngunnawal Country
Level 2, 51 Allara Street, Canberra ACT 2601
GPO Box 9839, Canberra ACT 2601
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OFFICIAL: Sensitive

s22

From: s22 @nswmining.com.au>
Sent: Friday, 3 June 2022 8:09 AM
To: s22
Cc: s22
Subject: Re: NSW coal industry state of play [SEC=OFFICIAL]

s22

OFFICIAL

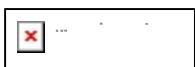
From: s22 @nswmining.com.au>
Date: Thursday, 2 June 2022 at 5:50:29 pm
To: s22 @industry.gov.au>
Cc: s22 @industry.gov.au>
Subject: Re: NSW coal industry state of play [SEC=OFFICIAL]

s22

s22

NSW Minerals Council Ltd

T s22
W nswmining.com.au



On Thu, Jun 2, 2022 at 5:00 PM s22

@industry.gov.au> wrote:

Dear s22

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An assessment of the industry's ability to supply additional coal to the domestic market and constraints that it might face. (e.g. rail capacity, coal quality mismatch, mining equipment and material supply chain issues, wet weather/water discharge limits, long-term contract commitments.)

I would appreciate it if you could provide my contact details (see signature below) to a relevant individual within the NSW Minerals Council to whom I could direct these questions, or alternatively, provide relevant contact details for me to follow up with.

Thanks

s22

Assistant Manager

Onshore Resources Division | Commodities and International Branch | Major Commodities Section

Ngunnawal Country, [51 Allara Street](#) (GPO Box 2013) Canberra ACT 2601 Australia

Department of Industry, Science, Energy and Resources

P s22 | s22 | **M** s22 | **E**s22 | @industry.gov.au

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OFFICIAL

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s22

W nswmining.com.au

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s22

From: s22 @nswmining.com.au>
Sent: Friday, 3 June 2022 9:03 AM
To: s22
Subject: Re: Discussion on NSW Coal Industry State of Play [SEC=OFFICIAL:Sensitive]

s22

s22

From: Google Calendar <calendar-notification@google.com> on behalf of s22
s22 @nswmining.com.au>
Sent: Friday, 3 June 2022 9:47 AM
To: s22
Subject: Accepted: Discussion on NSW Coal Industry State of Play [SEC=OFFICIAL] @ Fri 3 Jun 2022 10:30 - 11:00 (AEST) s22
Attachments: invite.ics

s22 has accepted this invitation.

Discussion on NSW Coal Industry State of Play [SEC=OFFICIAL]

When Fri 3 Jun 2022 10:30 – 11:00 Eastern Australia Time - Sydney

Where Microsoft Teams Meeting ([map](#))

Calendar s22

Who s22

As part of its work to brief the new Australian government on this issue, the Department of Industry, Science, Energy and Resources is seeking industry views on the current state of the Australian coal industry.

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Microsoft Teams meeting

Join on your computer or mobile app

[Click here to join the meeting](#)

Join with a video conferencing device

teams@vid.industry.gov.au

Video Conference ID: s22

Alternate VTC instructions

Or call in (audio only)

s22 Australia, Sydney

Phone Conference ID: s22

Find a local number | Reset PIN

Learn More | Meeting options

Invitation from [Google Calendar](#)

You are receiving this courtesy email at the account s22 @industry.gov.au because you are an attendee of this event.

To stop receiving future updates for this event, decline this event. Alternatively, you can sign up for a Google Account at <https://calendar.google.com/calendar/> and control your notification settings for your entire calendar.

Forwarding this invitation could allow any recipient to send a response to the organiser and be added to the guest list, invite others regardless of their own invitation status or to modify your RSVP. [Learn more](#)

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Discussion on NSW Coal Industry State of Play

Friday, 3 June 2022 10:28 AM

Meeting Date: 3/06/2022 10:30 AM

Location: Microsoft Teams Meeting

Link to Outlook Item: [click here](#)

Invitation Message

Participants



Notes

As part of its work to brief the new Australian government on this issue, the Department of Industry, Science, Energy and Resources is seeking industry views on the current state of the Australian coal industry.

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- An assessment of the major drivers of the current high thermal coal prices

- The impact, if any, of COVID and wet weather on NSW mining operations.

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NSW Mining notes:

- The current situation around energy in Australia is 'like a slow-moving car crash'. There are many commercial issues at play.
- There is no particular (non-price) supply issue of note that NSW Mining is aware of that is significant in terms of supplying coal to Eraring.
 - Where coal-fired power stations have to compete with export demand, high coal prices will challenge profitability.
 - Historically, coal has never been sold at a level above AU\$100 - AU\$60 is more typical.
- Myuna coal mine supplies to Eraring exclusively through a conveyor system.
- Mandalong coal mine supplies both export markets [through a private haul road to Newstan Colliery] and Eraring/Vales Point through conveyor belts.
- Centennial had been planning its coal investments based on Eraring operating until 2032.
 - Changed time frames has created more uncertainty over that investment.

s47E(d)

s47E(d)

s47E(d)

- Older coal-fired power stations in Australia tend to consume poorer quality coal.
- Washing coal improves the quality of the coal, making it more suitable for export markets.
 - Coal washing costs are generally fixed. When margins between different quality coals are large, coal companies can profitably wash more coal for export.

s22

From: s22
Sent: Friday, 3 June 2022 11:35 AM
To: s22
Cc:
Subject: Re: Contact at Centennial Coal [SEC=OFFICIAL]

s22

s22

OFFICIAL

From: s22 <@nswmining.com.au>
Date: Friday, 3 June 2022 at 11:01:57 am
To: s22 <@industry.gov.au>, s22 <@industry.gov.au>
Subject: Contact at Centennial Coal

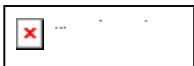
s22

s22 <@centennialcoal.com.au>

s22

NSW Minerals Council Ltd

T s22
W nswmining.com.au



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s22

S

From: s22 @minerals.org.au>
Sent: Tuesday, 28 June 2022 10:58 AM
To: s22
Subject: RE: Bio [SEC=OFFICIAL]
Attachments: MCA - ESG presentation - 28 June 2022.pdf

s22

Australian minerals industry ESG overview

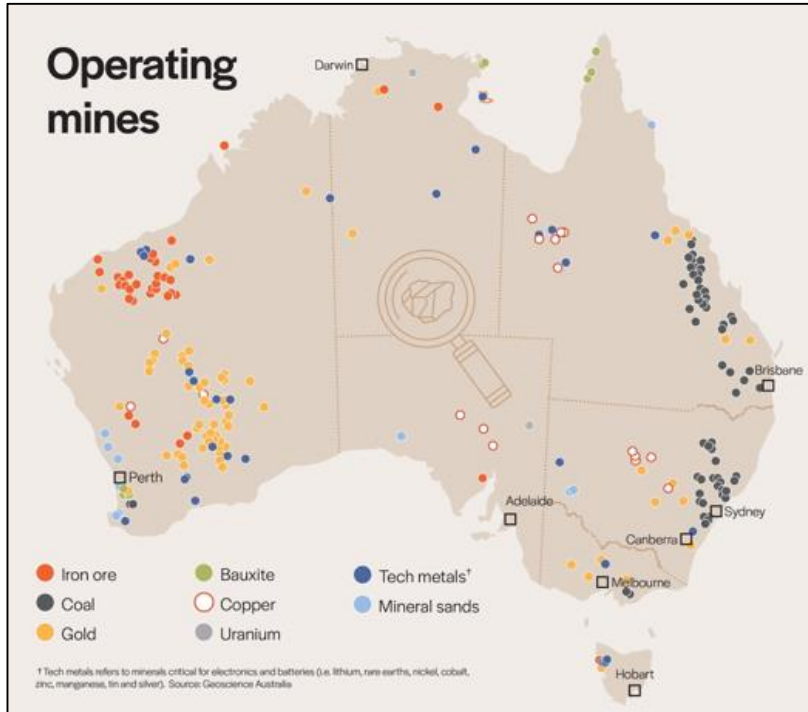
28 June 2022

s22 - Sustainability



Australia's mining industry

The largest exporter of minerals and metals in the world



Over 200 operating mines

Producing iron ore, gold, coal, copper, lithium and more



Supporting over 1.1 million jobs in Australia

The mining industry pays the highest wages in the country



\$352 billion of export revenue in 2021

68 per cent of Australia's export revenue



\$3.6 billion exploration investment in 2021

Securing Australian's economic future



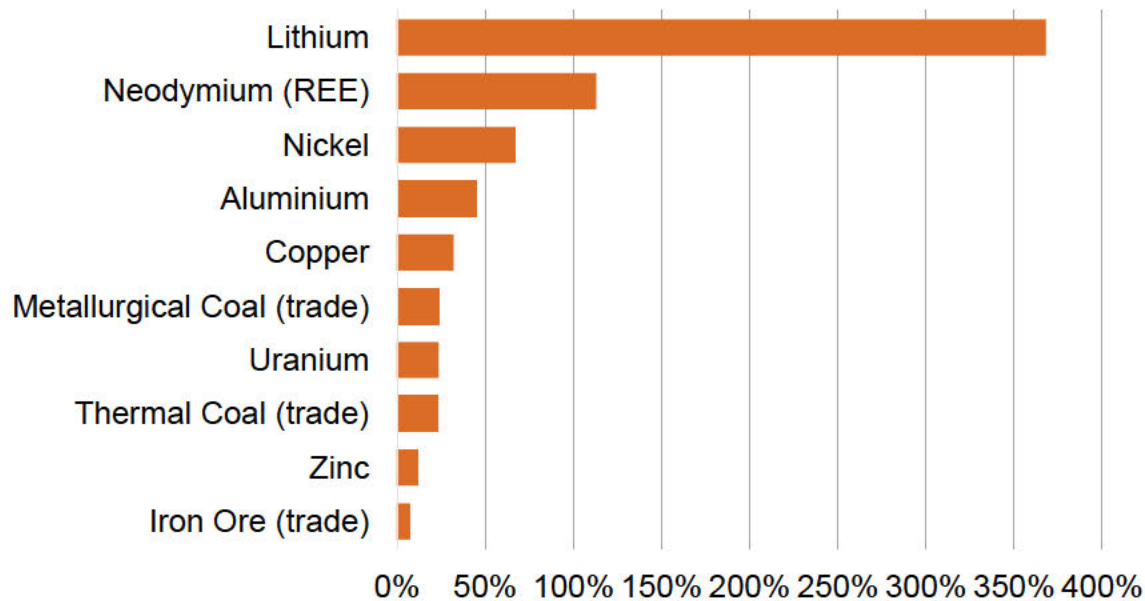
\$257 billion capex over 10 years

Building new mines and infrastructure

Increasing demand for minerals

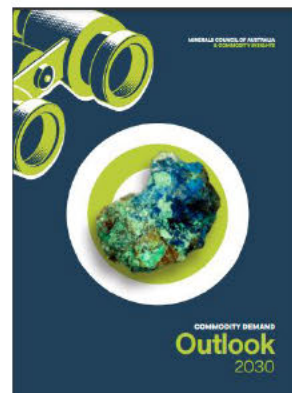
Opportunities for Australia's mining industry

Forecast world consumption growth to 2030



Key global trends shaping resource consumption:

1. Growing incomes in highly populated emerging economies
2. Increasing urbanisation
3. Innovation creating higher performance electronics
4. Move to low carbon energy sources
5. Government debt and monetary policy



- Growth in demand of existing and in particular transition minerals
- Geopolitical landscape is increasingly challenging, changing relationships
- The world is looking for security of supply chains
- ESG performance is becoming and integral to supply chain requirements
- The Australian industry is already regarded as a responsible, reliable supplier of minerals
- How does Australian industry leverage its strengths to meet future demand and growing ESG expectations?
- Australian industry is positioning for a world looking for more minerals, more accountability and more confidence in ESG credentials

The Australian operating environment

FOI EX 71579 Document 10

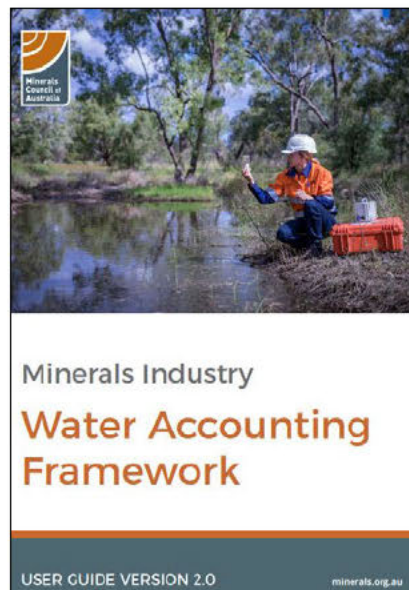
A mature, highly regulated and sophisticated jurisdiction:

- The Australian minerals industry operates under a comprehensive regulatory regime for the management of safety and environmental impacts
- Most mining projects are regulated by multiple jurisdictions, including Federal (international treaty obligations) and State/territory obligations
- Australian project assessment processes have evolved over past decades to be increasingly comprehensive and informed by global practice
- Social impact assessments have become increasingly commonplace
- Australian NGOs and communities are vigilant and engage actively in reforms and the development assessments
- Australian Stock Exchange – reporting of ESG matters in their Reporting Guide for Australian Companies

Industry investment in ESG practice

FOI EX 71379 Document 10

- The Australian minerals industry has long recognised its safety, environmental and social performance (sustainability performance) is fundamental to community acceptance and the future of the sector.
- Australian companies have continued to invest in research to drive ESG performance
- Collaboration with leading universities and research organisations and Cooperative Research Centres are globally leading (e.g. CRC TiME)
- Australian industry leading practice is exported internationally, through guidance, systems and expertise adopted elsewhere.



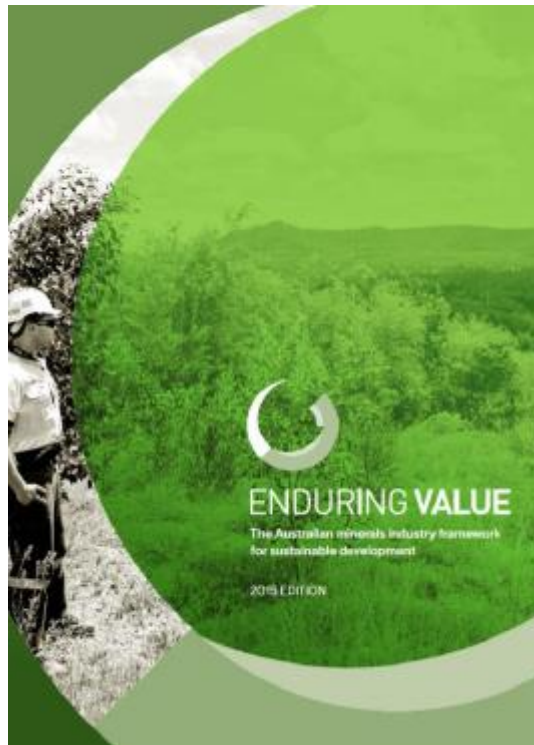
Collective commitments and voluntary codes

FOI EX 71379 - Document 16

Australian industry has been at the forefront of voluntary codes of practice – beyond regulatory requirements

Chronology of MCA sustainability initiatives:

- **1997** – World first Mining Code of Environmental Practice
- **2006** – Enduring Value: The Australian Minerals industry framework for Sustainable Development (based on ICMM principles)
- **2015** – Enduring Value updated to recognise industry sophistication
- **2018** – Shifting focus on the UN Sustainable Development Goals

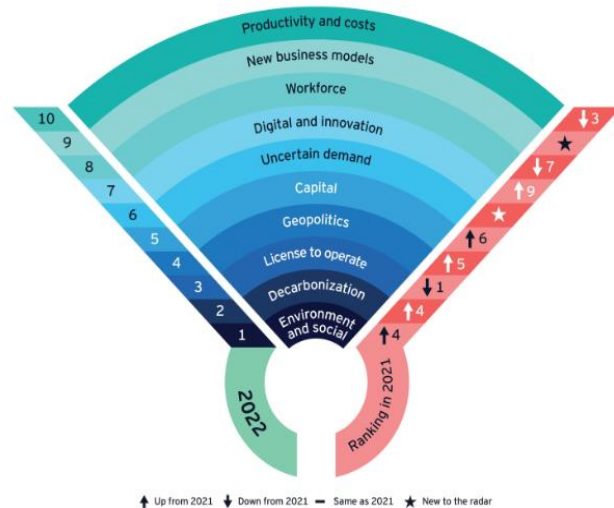


A rapidly changing world

FOPI EX 71379 - Document 10

- ESG performance is the top risk to minerals companies – affecting community acceptance and land access
- Increasing investor focus on ESG Risks at the facility level
- Growth of customer interest in responsible sourcing initiatives
- Greater integration of ESG requirements in stockmarket reporting
- Greater financial disclosure requirements and assurance requirements
- A drive for certification/independent oversight on key issues (e.g. Global Tailings Standard) and facility level disclosures.
- Communities are calling for greater transparency and on-ground demonstration of ESG commitments

The Australian industry is continuing to work together to navigate these increasing demands



Top 10 risks for mining, 2022
(Source, EY)

Proliferation of ESG standards and reporting

For LEX71376 - Document 10

Reporting

- **Global Reporting initiative** - Corporate Sustainability Reporting standards
- **CDP** – Carbon, water and deforestation
- **TCFD** – Climate related financial risks disclosure
- **ASX** – ESG Reporting Guide for Australian Companies (ACSI)
- **IFRS/SASB** - Sustainability Disclosures Standards
- Reporting against the contribution to the **UN Sustainable Development Goals**

Responsible Production

- Initiative for Responsible Mining Assurance
- ICMM Performance expectations
- World Gold Council – Responsible Gold Mining Principles
- TSM

Responsible Sourcing

- Aluminium Stewardship Initiative
- CopperMark, Risk Readiness
- Bettercoal
- Responsible Steel
- EU Taxonomy



RESPONSIBLY
PRODUCED
COPPER

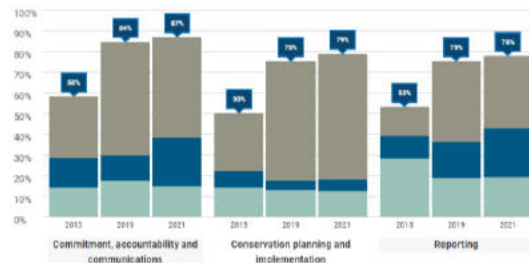
Towards Sustainable Mining (TSM)

The MCA is adopting the TSM performance system in recognition of the need to position the Australian industry in the face of a changing ESG landscape.

- A facility-level ESG performance and accountability system, developed by Mining Association of Canada in 2004
- A credible, easy to understand approach and consistent way to demonstrate and communicate performance.
- Includes protocols reflecting good practice in Communities and People, Environmental Stewardship, including Climate Change
- Overseen by an independent advisory body comprised of individuals from Indigenous groups, communities, civil society and industry.
- Performance results are publicly reported and independently verified
- Will enable companies to better manage risk, maximise opportunities and enhance community trust

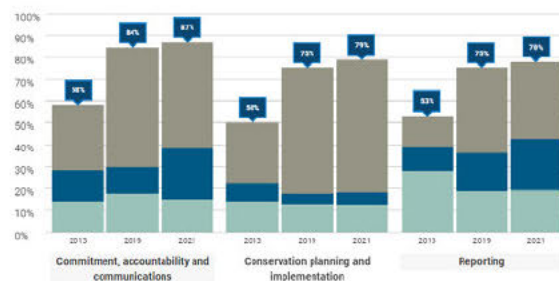
Percentage of Facilities at a Level A or Higher – 2013, 2019 and 2021

Level A ● Level AA ● Level AAA ● Last Updated: Mar 17, 2022 (100% Facilities Reporting)



Percentage of Facilities at a Level A or Higher – 2013, 2019 and 2021

Level A ● Level AA ● Level AAA ● Last updated Mar 17, 2022 (100% Facilities Reporting)



TSM protocols and indicators

FOI/EX 71379 - Document 10

Communities and People

Indigenous and Community Relationships

Crisis Management and Communications Planning

Safety and Health

Prevention of Child and Forced Labour

Community of interest (COI) identification

Crisis management & communications preparedness

Policy, commitment and accountability

Preventing forced labour

Effective COI engagement and dialogue

Review

Planning, implementation and operation

Preventing child labour

Training

Training, behavior and culture

Effective Indigenous engagement and dialogue

Monitoring and reporting

Community impact and benefit management

Performance

COI response mechanism

Environmental Stewardship

Tailings Management

Biodiversity Conservation Management

Water Stewardship

Climate Change

Tailings management policy and commitment

Corporate biodiversity conservation commitment, accountability and communications

Water Governance

Corporate climate change management

Tailings management system

Facility-level biodiversity conservation planning and implementation

Operational Water Management

Facility climate change management

Assigned accountability and responsibility for tailings management

Biodiversity conservation reporting

Watershed-Scale Planning

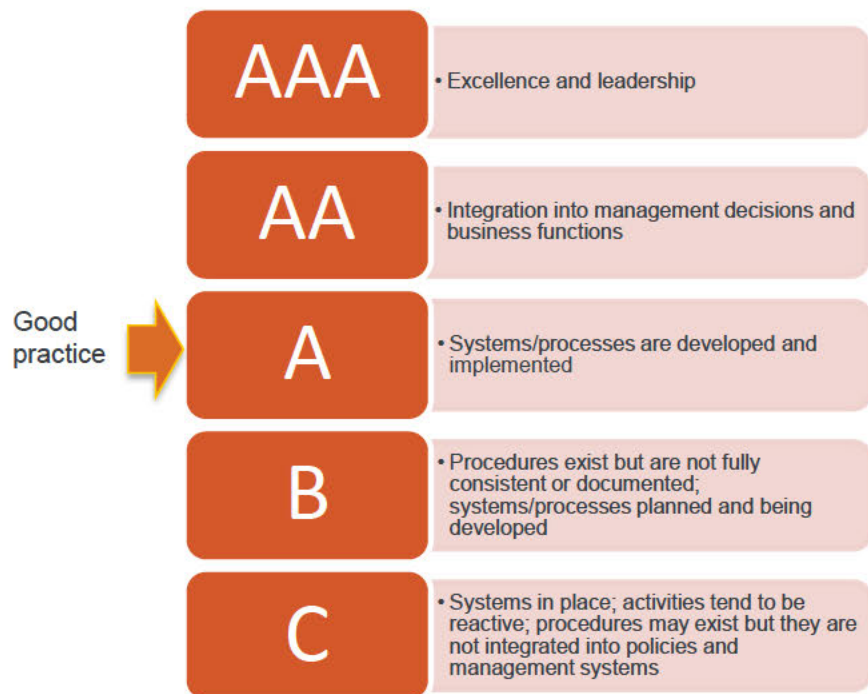
Water Reporting and Performance

Annual tailings management review

Operation, maintenance and surveillance (OMS) manual

Assessment and verification

POCLEX 1319 - Document 10



Verification

- Annual self-assessments
- External verification of self-assessments by trained verifiers every three years
- Letter signed by CEO that the results are externally verified according to requirements
- Potential for selection by the advisory panel for a post-verification review.

Company reporting

FOI EX 17-379 Document 10

TSM Performance by Company Teck Resources Limited



Teck

Teck is a diversified resource company committed to responsible mining and mineral development, with business units focused on copper, steelmaking coal, zinc and energy. Headquartered in Vancouver, British Columbia, Teck owns or has an interest in 12 mines in North and South America, as well as one large metallurgical complex and an oil sands mining and processing operation, both in Canada. Teck has expertise across a wide range of activities related to exploration, development, mining and minerals processing, smelting and refining, safety, environmental protection, materials stewardship, recycling and research.

TSM RESULTS

All of Teck's operations apply TSM, and all Canadian operations publicly report their TSM results. Teck's Canadian operations include Highland Valley Copper and Trail operations in British Columbia as well as six steelmaking coal operations in British Columbia and Alberta: Cardinal River, Coal Mountain, Elkview, Fording River, Greenhills and Line Creek.

In 2017, the Vancouver head office and two of Teck's operations, Coal Mountain and Line Creek, underwent TSM verification. The verification process included either an external verification performed by PwC or an internal verification performed by Teck*. The reviews assessed Teck's reported performance results for the year ending December 31, 2017, as measured against the requirements of the TSM performance indicators.

Teck's overall results for 2017 were strong, and the company achieved high levels of performance across all six TSM Protocols. All eight of Teck's Canadian operations achieved a Level AAA for all indicators of the *Biodiversity Conservation Management, Energy Use and GHG Emissions Management, and Aboriginal and Community Outreach Protocols*.



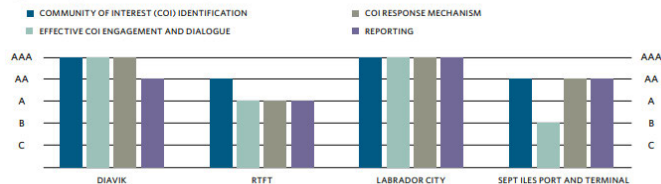
2017 TSM Results

Rio Tinto

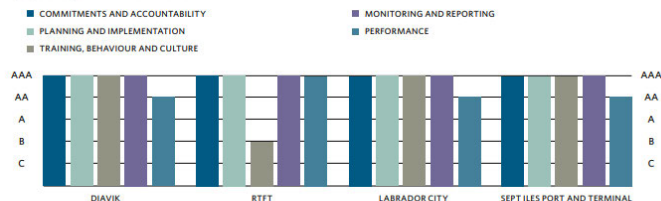
Crisis Management and Communications Planning Assessment

FACILITY	PREPAREDNESS	REVIEW	TRAINING
CORPORATE	✓	✓	✓
DIAMIK	✓	✓	✓
RTFT	✓	✓	✓
LABRADOR CITY	✓	✓	✓
SEPT ILES PORT AND TERMINAL	✓	✓	✓

Aboriginal and Community Outreach Assessment



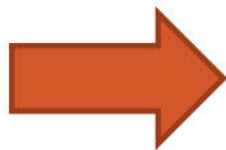
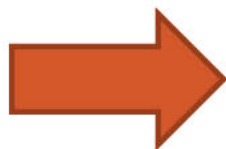
Safety and Health Assessment



Self-assessed results; last external verification: 2017; next external verification: 2020.



Using TSM to meeting other standards



LMEpassport

GLOBAL INDUSTRY
STANDARD ON
TAILINGS
MANAGEMENT



Further information:

s22

Sustainability

Email s22 @minerals.org.au

Tel: s22



www.minerals.org.au

s22

From: s22 [@minerals.org.au](mailto:s22@minerals.org.au)
Sent: Tuesday, 21 June 2022 9:29 AM
To: s22 [@industry.gov.au](mailto:s22@industry.gov.au)>
Subject: RE: Hello [SEC=OFFICIAL]

s22
Hi

It is lovely to hear from you. I hope you had a good year and how quickly it has gone by!

There is a lot going on in coal as usual. I've just been to s47E(d)

I would be pleased to come over and have a coffee with you or meet more formally. s22

Regards

s22

From: s22 <s22@industry.gov.au>
Sent: Tuesday, 21 June 2022 9:16 AM
To: s22 <s22@minerals.org.au>
Subject: Hello [SEC=OFFICIAL]

Hi s22

Just thought I would touch base to let you know s22
coming weeks/months to chat all things coal.

Hope you have been well!

Kind regards

s22 . It would be great to catch up in the

s22 | Major Commodities

Onshore Resources Division

Department of Industry, Science, Energy and Resources

Ph: s22

M: s22

s22 <s22@industry.gov.au>

s22

OFFICIAL

s22

From: s22
Sent: Wednesday, 29 June 2022 1:51 PM
To: s22
Subject: RE: Coal industry roundtable - IEA review - Canberra June [SEC=OFFICIAL]

Thanks s22 s47E(d)

OFFICIAL

s45