



The Chamber of Minerals and Energy of WA

Overview of the Western Australian Resources Sector

Presented by Nicole Roocke
Director

Unearthing People for the Future Conference
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CME Reason for Being

To champion the Western Australian resources sector and assist it in achieving its vision to lead the world in sustainable practice through innovation and underpin Australia's position in the global economy



Industry Vision – In 2020, the Western Australian resource sector leads the world in sustainable practice through innovation and underpins Australia’s position in the global economy.

Communities

Highly valued and strongly supported member of the community

Natural Resources

Government and Industry infrastructure which facilitates continuous improvement and growth in the resource sector.

People

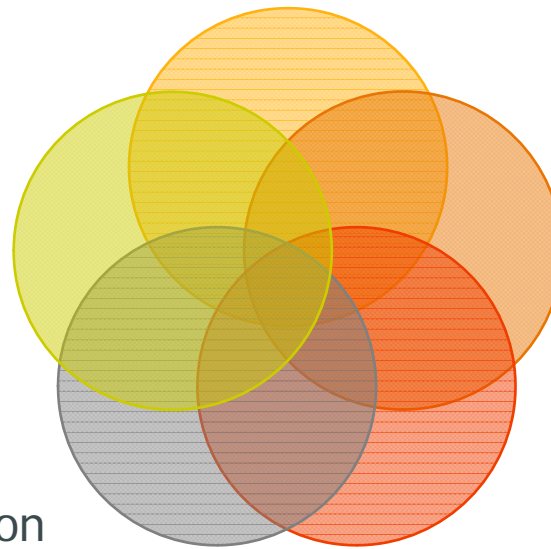
Including:
Career Opportunities
Meet safety standards

Innovation

Proactive, capable and responsive.
Implementing solutions to
future issues

Infrastructure & Planning

Sustainable practices ensuring
an ongoing social licence to operate



WA's Resource Regions

Kimberley

Diamonds, oil and gas, zinc/lead, bauxite, iron ore, base metals

Pilbara

Oil and gas, iron ore, salt, gold, base metals

Mid West

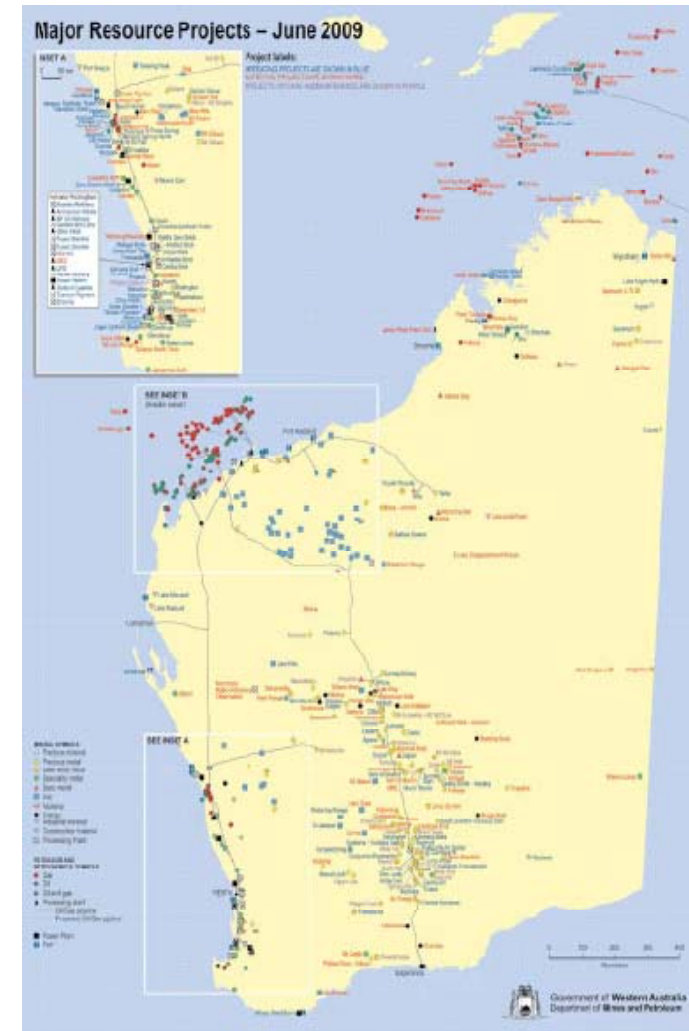
Nickel, oil and gas, salt, lime, mineral sands, gold, iron ore, phosphate, talc

Goldfields/Esperance

Gold, nickel, uranium, lanthanides, copper, zinc, lead

South West

Mineral earths, bauxite & alumina, coal, gold, tantalum



The Western Australian Resources Sector

Western Australia's resources sector accounts for:

- \$58.6 billion in production value *
- \$2.95 billion in exploration *
- 83% of the State's merchandise export income *
- Around 37.3% of WA's Gross State Product *
- \$2.3 billion in State royalties *
- \$1.69 billion in Federal Petroleum Royalties *
- More than \$73 billion of resources projects are either committed or under consideration in WA *



Photo courtesy of BHP Billiton Iron Ore

* 2007-08 Department of Minerals and Petroleum

* ABS

* APPEA/DOIR 06-07

* Mar 09 Prospect Magazine

WA at a National Level

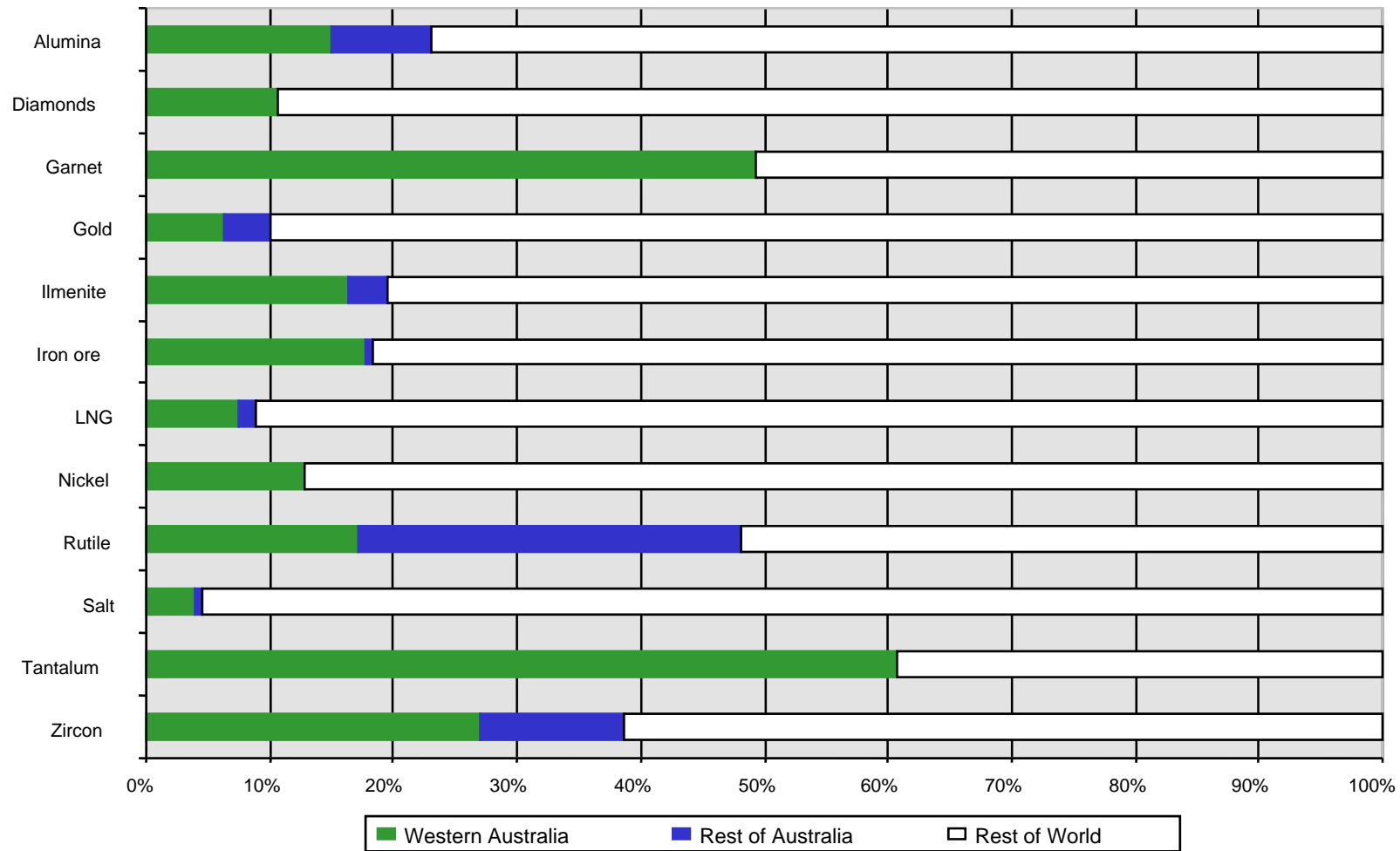
The WA resources sector accounted for:

- 53% of Australia's total value of mineral and petroleum sales
- 70% of Australia's oil and condensate production
- 40% of Australia's total merchandise exports
- 51% of Australia's mineral exploration expenditure
- 72% of Australia's petroleum exploration expenditure
- 63% of total national mining investment



Source: 2007-08 Department of Industry and Resources statistics

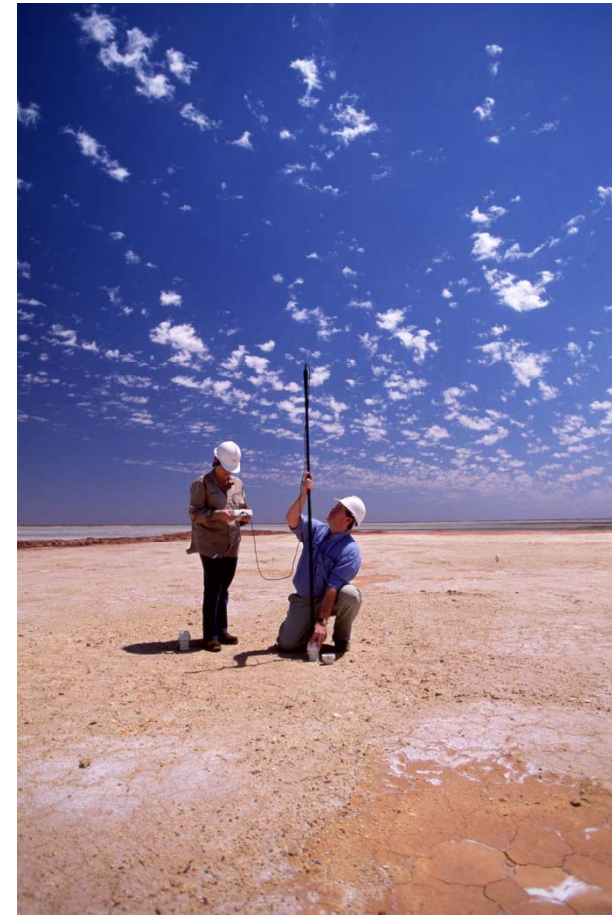
WA COMMODITIES RELATIVE TO WORLD PRODUCTION



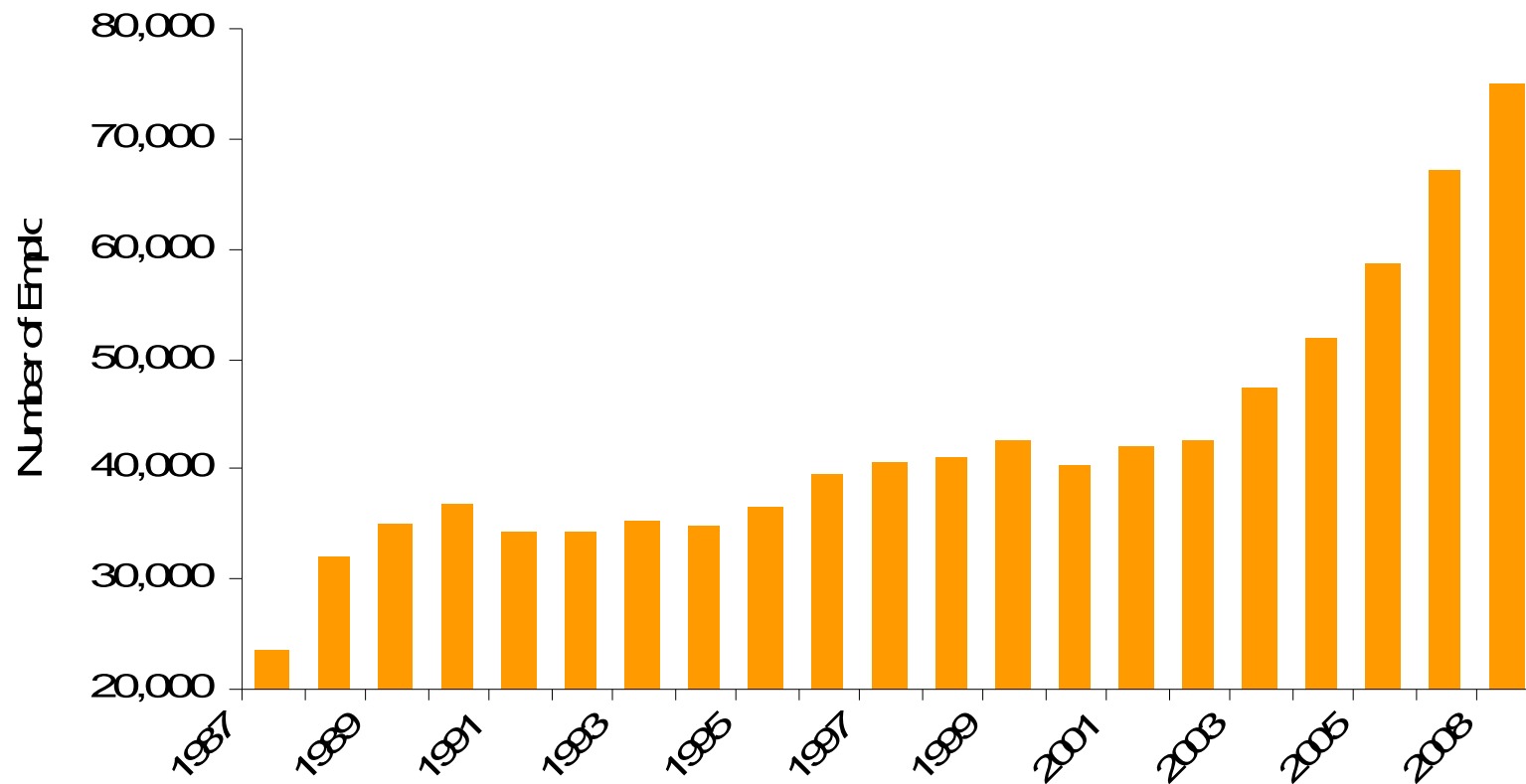
Employment

- Direct employment of 74,883
- Direct and indirect employment of over 215, 000
- Direct employment increased by 41,100 workers in the ten years to 2006-07*
- Over the period 2001-02 to 2007-08, the resources sector added 90,570 jobs across the WA economy*

* Chamber of Commerce and Industry WA *Nat Institute Labour Studies



Employment



Source: 2009 Department of Mines and Petroleum

CME State Growth Outlook Study

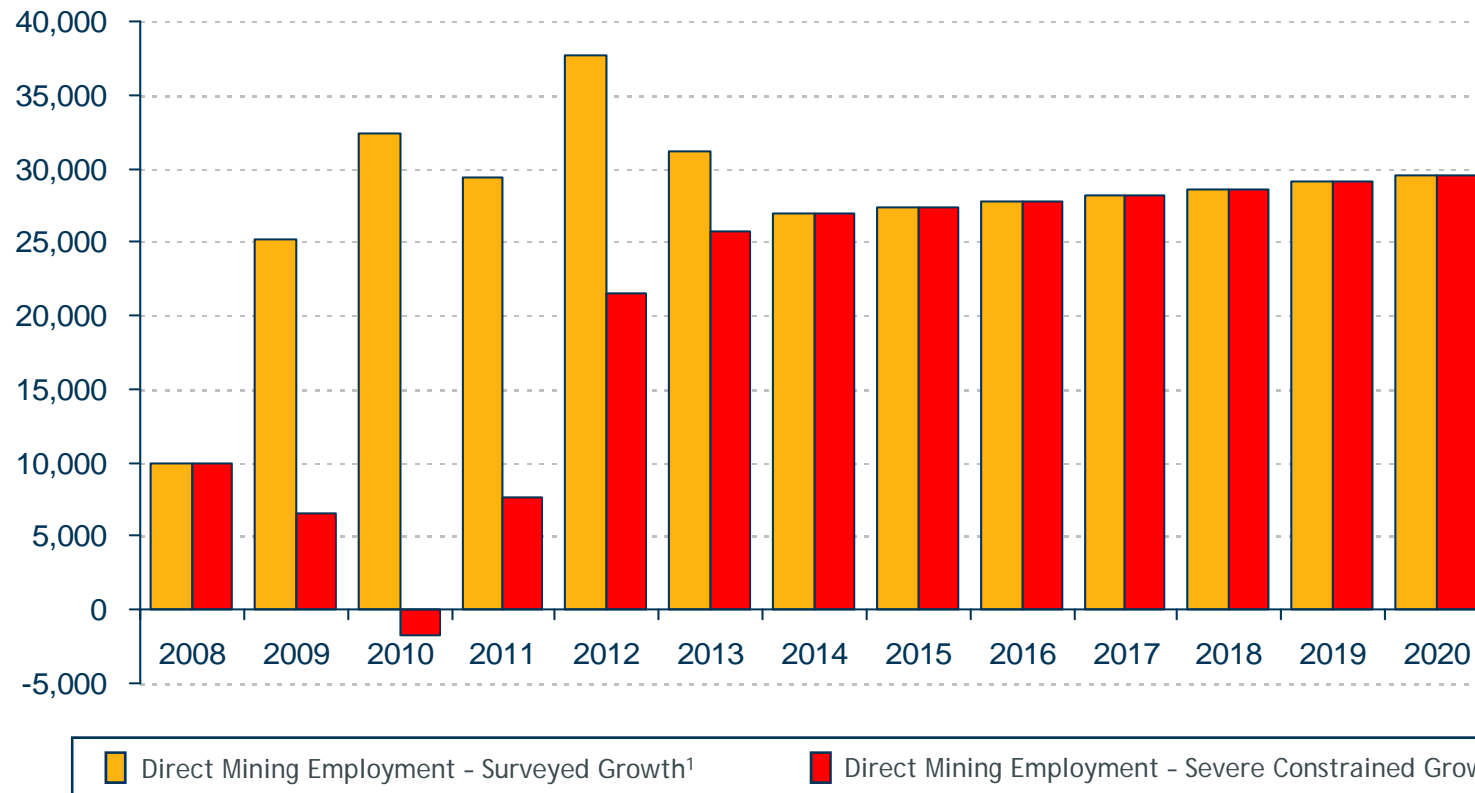
- People
- Energy
- Water



People - Minerals & Energy - Severe Constrained Growth Scenario

Incremental Labour Demand - State wide - Severe Constrained Growth Scenario

(Headcount Incremental to 2007 levels, 2008 - 2020)



1 Direct Survey Data, GEM Analysis above 2007 employment

2 Direct Survey Data, GEM Analysis above 2007 employment. The Severe Constrained Growth Scenario represents a severe, long lasting impact of the current financial crisis on the sector and closely reflects the downturn in mining capital expenditure seen in the Asian Banking Crisis.

Skills Shortage

- Substantial growth in WA will return in the medium to long-term.
- Continued pressure on labour supply
- Employers currently experiencing difficulty filling specific job roles.



Preparing for the Future

- Need to ensure a trained, skilled workforce is developed and maintained.
- Utilise this opportunity to undertake new training.
- Consolidate their skills by going back to study.



Education and Training

- Developing our existing workforce
- Preparing for, engaging with, and developing tomorrow's workforce
- A resources focus across the curriculum
- An industry commitment to training



Vocational Education and Training

- Employers providing training is on the rise.
- 83% engaged with the VET system, compared with 54% for all industries.
- The industry invests more money per employee on training than any other industry.
- 28% of mining employees have a Cert III or IV qualification, compared with 17% for all employees.
- CME sponsor WA Training Awards



Source: NCVET: Industry & Training 2007 - Exploring the relationship between industry and the VET system

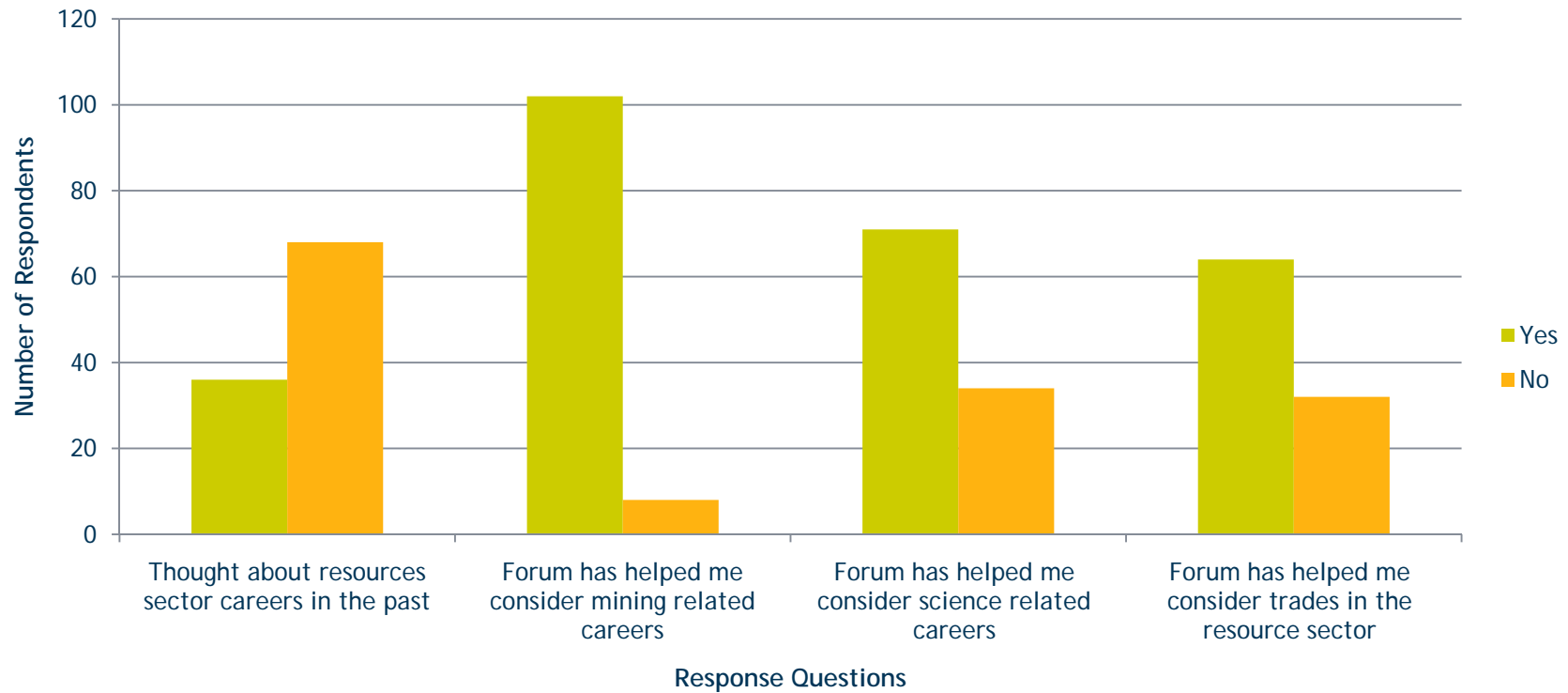
University

- Strong demand for employees with professional qualifications.
- Graduate and Vacation Programs.
- Investment in Universities.
- Western Australian School of Mines.



Women in Resources

Impact of Women in Mining Forum on consideration of resource related careers



Indigenous Workforce Focus

- Working in Partnerships Across WA.
- Cultural Awareness Programme.
- Indigenous Women Participation Publication.
- Indigenous Networking Initiative.
- Industry Led approach to Indigenous Workforce Participation, Education and Training.



Promoting Careers in the Resources Sector

- www.peopleforthefuture.com.au
- Career Expo's
- Unearthing People for the Future Conference
- Teacher Tours
- eNewsletter (New)
- Speakers Bureau (Coming Soon)





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