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EY
Building a better working world
Q1: What is your age?

- 25 or younger: 20.35%
- 26-40: 47.67%
- 40-55: 31.98%
Q2: What is your role in the Industry?

- Junior Professional... 2.33%
- Senior Management (GM) 26.16%
- Executive (CEO) 30.23%
- Board Director 16.28%
- Other 25.00%
Q3: How positive are you about the long-term future of the SA Mining Industry? On a scale of 1 to 4

- 1 Very Negative: 7.02%
- 2 Negative: 36.26%
- 3 Positive: 49.71%
- 4 Very positive: 7.02%
Q4: How would you rate SA MINING in terms of the use of MODERN TECHNOLOGY? On a scale of 1 to 4

- 1 Low: 18.56%
- 2 Medium: 58.68%
- 3 Good: 21.56%
- 4 World Class: 1.20%
Q5: Please rate the GOLD INDUSTRY in terms of the use of MODERN TECHNOLOGY. On a scale of 1 to 4

- 1 Low: 32.34%
- 2 Medium: 52.10%
- 3 Good: 13.77%
- 4 World Class: 1.80%
Q6: Please rate the PLATINUM INDUSTRY in terms of the use of MODERN TECHNOLOGY. On a scale of 1 to 4

- 1 Low: 12.65%
- 2 Medium: 58.43%
- 3 Good: 27.11%
- 4 World Class: 1.81%
Q7: Please rate the COAL INDUSTRY in terms of the use of MODERN TECHNOLOGY. On a scale of 1 to 4

- **1 Low**: 8.43%
- **2 Medium**: 34.34%
- **3 Good**: 46.39%
- **4 World Class**: 10.84%
Q8: Please rate the BULK MATERIALS INDUSTRY in terms of the use of MODERN TECHNOLOGY. On a scale of 1 to 4

- 1 Low: 7.36%
- 2 Medium: 42.94%
- 3 Good: 44.79%
- 4 World Class: 4.91%
Q9: Please rate the DIAMOND INDUSTRY in terms of the use of MODERN TECHNOLOGY. On a scale of 1 to 4.

1 Low: 1.84%
2 Medium: 22.70%
3 Good: 51.53%
4 World Class: 23.93%
Q10: Please rate the SA MINING INDUSTRY in terms of the technology used for ROCKBREAKING. On a scale of 1 to 4

- 1 Ancient: 2.55%
- 2 Old: 42.04%
- 3 Current: 52.87%
- 4 State of the Art: 2.55%
Q11: Please rate the SA MINING INDUSTRY in terms of the technology used for SUPPORT. On a scale of 1 to 4.

- 1 Ancient: 1.27%
- 2 Old: 31.21%
- 3 Current: 61.78%
- 4 State of the Art: 5.73%
Q12: Please rate the SA MINING INDUSTRY in terms of the technology used for TRANSPORTING ORE. On a scale of 1 to 4:

- 1 Ancient: 3.18%
- 2 Old: 38.85%
- 3 Current: 55.41%
- 4 State of the Art: 2.55%
Q13: Please rate the SA MINING INDUSTRY in terms of the technology used for MODELLING AND DESIGN. On a scale of 1 to 4.
Q14: Please rate the SA MINING INDUSTRY in terms of the technology used for EXPLORATION. On a scale of 1 to 4

1. Ancient: 0.65%
2. Old: 15.48%
3. Current: 69.68%
4. State of the Art: 14.19%

Q15: How would you rate SA Mining in terms of HARD Technical Skills in MINING ENGINEERING? On a scale of 1 to 4

- 1 Weak: 5.16%
- 2 OK: 36.77%
- 3 Good: 43.23%
- 4 World Leaders: 14.84%
Q16: How would you rate SA Mining in terms of HARD Technical Skills in ENGINEERING/MAINTENANCE? On a scale of 1 to 4

- 1 WEAK: 8.39%
- 2 OK: 40.00%
- 3 GOOD: 43.87%
- 4 WORLD LEADERS: 7.74%
Q17: How would you rate SA Mining in terms of HARD Technical Skills in GEOLOGY/MINERAL RESOURCE MANAGEMENT? On a scale of 1 to 4

- **1 WEAK**: 2.60%
- **2 OK**: 22.73%
- **3 GOOD**: 58.44%
- **4 WORLD LEADERS**: 16.23%
Q18: How would you rate SA Mining in terms of the "SOFTER" People and Leadership Skills? On a scale of 1 to 4

- 1 WEAK: 38.31%
- 2 OK: 37.66%
- 3 GOOD: 22.08%
- 4 WORLD CLASS: 1.95%
Q19: How would you rate SA CEO'S of Mining Companies relative to the World's Best Companies? On a scale of 1 to 4

![Bar chart showing distribution of ratings]

- 1 VERY WEAK: 1.30%
- 2 BELOW AVERAGE: 24.03%
- 3 AVERAGE: 54.55%
- 4 ABOVE AVERAGE: 20.13%
Q20: Management EFFECTIVELY communicates strategic direction to the EMPLOYEES? On a scale of 1 to 4

- 1 VERY INEFFECTIVE: 12.50%
- 2 INEFFECTIVE: 64.47%
- 3 EFFECTIVE: 21.05%
- 4 VERY EFFECTIVE: 1.97%
Q21: Management EFFECTIVELY communicates strategic direction to the SHAREHOLDERS? On a scale of 1 to 4

- **1 VERY INEFFECTIVE**: 1.97%
- **2 INEFFECTIVE**: 31.58%
- **3 EFFECTIVE**: 60.53%
- **4 VERY EFFECTIVE**: 5.92%
Q22: Management EFFECTIVELY communicates strategic direction to the OTHER STAKEHOLDERS? On a scale of 1 to 4

- 1 VERY INEFFECTIVE: 16.56%
- 2 INEFFECTIVE: 52.32%
- 3 EFFECTIVE: 28.48%
- 4 VERY EFFECTIVE: 2.65%
Q23: How EFFECTIVE are SA Mining Managers in building constructive relationships with UNIONS? On a scale of 1 to 4
Q24: How EFFECTIVE are SA Mining Managers in building constructive relationships directly with EMPLOYEES? On a scale of 1 to 4

- 1 VERY BAD: 9.27%
- 2 BAD: 41.06%
- 3 OK: 47.02%
- 4 VERY GOOD: 2.65%
Q25: How GOOD are SA Mining Management in terms of LISTENING TO EMPLOYEES' INPUTS AND SUGGESTIONS? On a scale of 1 to 4

- 1 NOT AT ALL: 15.33%
- 2 GETTING THERE: 70.00%
- 3 GOOD: 14.00%
- 4 EXCELLENT: 0.67%
Q26: How GOOD are SA Mining Management in terms of ENGAGING AND INSPIRING THE WORKFORCE? On a scale of 1 to 4

- 1 NOT AT ALL: 28.00%
- 2 GETTING THERE: 65.33%
- 3 GOOD: 6.00%
- 4 EXCELLENT: 0.67%
Q27: SA Mining makes use of STATE OF THE ART SYSTEMS (like Software, Geostats, IT, ERP etc.). On a scale of 1 to 4

- 1 Stuck in the Past: 6.08%
- 2 A Bit Dated: 41.89%
- 3 Up to Date: 47.97%
- 4 State of the Art: 4.05%
Q28: How would you rate SA Mining in terms of PEOPLE STRUCTURES? On a scale of 1 to 3

- 1 STUCK IN 1980: 52.70%
- 2 APPROPRIATE FOR TODAY’S: 46.62%
- 3 APPROPRIATE FOR FUTURE: 0.68%
Q29: How would your rate SA Mining in terms of PEOPLE PRACTICES? On a scale of 1 to 3

- 1 STUCK IN 1980: 53.38%
- 2 APPROPRIATE FOR TODAY'S...: 45.27%
- 3 APPROPRIATE FOR FUTURE...: 1.35%
Q30: Regulatory certainty? On a scale of 1 to 4

- 1 VERY BAD: 39.19%
- 2 TOO MUCH CHOPPING +...: 51.35%
- 3 OK: 8.11%
- 4 VERY GOOD: 1.35%
Q31: Application of regulations? On a scale of 1 to 4

- 1 CORRUPT: 32.43%
- 2 INCONSISTENT: 57.43%
- 3 CONSISTENT, BUT SLOW: 8.78%
- 4 VERY GOOD: 1.35%
Q32: Compliance demands on SA Mining? On a scale of 1 to 3

1 VERY HIGH AND COSTLY: 70.27%
2 ABOUT RIGHT: 26.35%
3 VERY LOW COMPARED TO ...: 3.38%
Q33: Investor friendly regulations? On a scale of 1 to 3

1 PUSH INVESTORS AWAY: 81.76%
2 NEUTRAL TO INVESTORS: 16.22%
3 VERY COMPETITIVE...: 2.03%
Q34: Do the regulations strike the right BALANCE BETWEEN STAKEHOLDERS? On a scale of 1 to 4
Q35: Select the ONE criteria that is the BEST thing that SA Mining has got going for it from an INVESTOR'S OR FUNDER'S PERSPECTIVE.
Q36: Select the ONE criteria that KEEPS Investors/ Funders from INVESTING in SA Mining.

1. OLD MINES/ NO...
   - 1.36%

2. LABOUR/ UNION ISSUES
   - 14.97%

3. REGULATORY UNCERTAINTY
   - 65.31%

4. BBBEE REQUIREMENTS
   - 8.16%

5. LOW RETURNS
   - 8.16%

6. BAD MANAGEMENT
   - 2.04%
Q37: SECTION 54 stoppages are a very visible and costly "INVESTMENT" in safety compliance. Please rate their EFFECTIVENESS on a scale of 1 to 4.
Q38: What ONE tangible outcome would make our COMMUNITIES THE HAPPIEST?
Q39: If YOU could choose, which ONE of these outcomes would YOU like to PROVIDE for communities?

- **1 Involvement and...**: 25.17%
- **2 Jobs**: 62.24%
- **3 Roads and Schools**: 6.99%
- **4 Dividends/Royalties**: 4.20%
- **5 Environmenta...**: 1.40%
Q40: Which GROUP is the MOST prepared for the Modernisation of the SA Mining Industry?
Q41: Which GROUP is the LEAST prepared for the Modernisation of the SA Mining Industry?
Q42: How do you RATE the DMR of SA as a regulator?
Q43: How do you RATE Minister Zwane as a Minister of Mines?

- **1 VERY WEAK**: 65.25%
- **2 BELOW AVERAGE**: 26.24%
- **3 AVERAGE**: 7.80%
- **4 ABOVE AVERAGE**: 0.71%
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