STATE OF PLAY: COVID-19
Resources industry response to the global pandemic
Level of concern

Rate the extent to which you are concerned about the COVID-19 pandemic

By % of respondents

- Extreme: 13%
- High: 48%
- Moderate: 25%
- Low: 13%
- Not at all: 2%
Level of concern

Rate the extent to which you are concerned about the COVID-19 pandemic

By % of respondents

“My concern depends on the horizon. Short term concern regards safety of people; medium term concern regarding economics and finances; long term concern regarding strategies for recovery (of people, mindsets, economies, and our yet to be determined impacts on our business)”

“COVID-19 is manageable, but the resulting actions globally have the potential to significantly impact our business. Specifically border closures and airline restrictions inhibiting the movement of people.”

“The pandemic will be a four to six-month interruption to global trade and provide the correction to asset bubbles”

“It is all about the uncertainty. We are not sure what to do as there is confusing and no clear direction from government or health professionals. We are waiting for cancellations of major events. Everyone is distracted about what will happen next.”

“Due to the restrictive conditions site is placing I know that my work will be stopped, and payments stopped”

“Media hype has fuelled the panic. Some population sectors of course at high risk but governments have failed to send the right message.”

“Concerned about communities remaining calm in the face of adversity. Concerned about longer term supply issues such as fuel and medicine”.

“I’m personally more worried about the economical fall-out and potential reactions in the wider community than the actual mortality risks”
Change in level of concern

Has your level of concern increased or decreased in the past week?

By % of respondents

- Significantly increased: 34%
- Increased: 44%
- No change: 21%
- Decreased: 1%
- Significantly decreased: 0%

By % of respondents
Change in level of concern

Has your level of concern increased or decreased in the past week?

By % of respondents

“I was lucky enough to get several opinions from medical experts early on as well as monitor responses from counties like Singapore to determine best in class responses”

“We are only getting bad news - spread of virus, border closings, stock market.”

“Sentiment has changed significantly each week in the last 4 weeks.”

“The data was clear a few weeks ago. Difference now is the government is taking it seriously.”

“Level of concern impacted by the the restrictions announced by the President.”

“The way that some governments are responding in my mind is increasing the risk factor significantly.”

“Some responses feel like they may be overblown but I guess winter is coming to the southern hemisphere, which could be serious”
To what extent has your company been impacted by the COVID-19 pandemic to date?

By % of respondents

- Out of business: 1%
- Strong impact: 16%
- Significant impact: 31%
- Some impact: 40%
- Not at all: 12%
Level of impact on business

To what extent has your company been impacted by the COVID-19 pandemic to date?

By % of respondents

“A couple of staff working from home and no longer visiting most mine sites but can have video meetings for some appointments instead”

“Contracts delayed and potentially will be cancelled”

“Not out of business but nobody is open to spending on preparing for what happens next”

“Our operations are significantly affected but much of what we do can be done remotely. We are making changes to have a telepresence for all but essential staff that have to be on site.”

“Management planning is consuming a lot of bandwidth, but revenue has stayed constant”

“Staff terminations and loss of ability to conduct business due to travel restrictions”

“Much will depend on the reactions of major companies to this crisis and hopefully they realise that they have a responsibility to society to keep spending to support industry”

“Slow due to wet season but remains to be seen whether coal will be classified as an ‘essential industry’”
Disruption to work & response

Do you expect major disruptions to your work from the COVID-19 pandemic?
By % of respondents

- Yes: 24%
- No: 76%

Has your work site taken any actions directly related to COVID-19?
By % of respondents

- Yes: 90%
- No: 10%
Disruption to work & response

Do you expect major disruptions to your work from the COVID-19 pandemic?

By % of respondents

“A plan has been made to stagger office personnel so that they are working from home most of the time”

“Still need to keep the business running despite difficulties of client interaction and revenue generation”

“I form part of a project team with the sole role of preparing for a major shutdown in 2021. For the time being its BAU at work.”

“If the economy goes into recession”

“Labour force of some 55 000 people in close proximity working conditions”

“Market uncertainty and lack of expected actions could be an issue”

Has your work site taken any actions directly related to COVID-19?

By % of respondents

“Providing sanitizing spray in each piece of equipment, handing out sanitizing hand wipes before entry to and upon exit from common buildings, extra cleaning between shifts”

“Primarily work from home; suspend travel; suspend group gatherings”

“I form part of a project team with the sole role of preparing for a major shutdown in 2021. For the time being its BAU at work.”

“Increased communication and activation of the Incident Management Team; stepped up Business Continuity planning meetings for surveillance of disruptions”

“Jobs offshore postponed”

“Closed for 2 weeks while converting to remote operation. All travel is suspended.”
Test outcomes

Has anyone at your worksite tested positive for COVID-19?

By % of respondents

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Change in level of concern

How would you rate the level of response your work site has taken in response to the COVID-19 pandemic?

By % of respondents

- Extreme: 6
- High: 38
- Moderate: 43
- Low: 12
- None: 1
Change in level of concern

How would you rate the level of response your work site has taken in response to the COVID-19 pandemic?

By % of respondents

“We followed what worked for us in China. We found ourselves generally a few weeks ahead of government advisories.”

“There was no need to change anything, only zero travel”

“A pragmatic view attempting to protect employees whilst trying to keep the business going.”

“Events is a major source of income, but health and safety is our first priority.”

“There was no need to change anything, only zero travel”

Justifiable and relevant display of leadership in the chaos
Responses to the pandemic

What actions has your work site taken in response to the COVID-19 pandemic?

By % of respondents

- Travel restrictions: 74%
- Promotion of preventative measures: 56%
- Postponing all non-critical activities: 49%
- Information sharing with other businesses: 40%
- Partial remote work (incl. split teams): 37%
- Full workforce remote work: 30%
- Updated leave policy: 17%
- Site closure: 7%
- No action: 3%

- Communication of site policy: 61%
- Development of action plan: 56%
- Cancellation of all external meetings: 43%
- Precautionary quarantines: 39%
- Mobilised crisis management teams: 31%
- Large-scale remote work pilots: 21%
- Workforce temperature screening: 11%
- Require medical certification of negative coronavirus status: 7%
Responses to the pandemic

What actions has your work site taken in response to the COVID-19 pandemic?

By % of respondents

“We have a good flexible work policy that allows for up to 50% working from alternate locations, this has been increased to 100% for people impacted by quarantine or isolation requirements and the IT team has fast-tracked VPN access to all staff in case working from home becomes necessary”

“Visitor questionnaire and temperature screening”

“Restricting public exposure. No flights for travel and no offshore work.”

“Top focus is on preventative measures. Most important are social distance and cleaning of course.”
Sustainability of current situation

How long can your company sustain output under the current operating conditions?

By % of respondents

- Up to 1 month: 10
- 1-3 months: 18
- 3-6 months: 22
- 6-12 months: 16
- This is sustainable: 33
Operating model and supply chain impact

Do you believe the COVID-19 pandemic have a lasting impact on industry operating models and supply chains?

By % of respondents

- **81%**: No
- **19%**: Yes

“"This in a once in a century event so unlikely to substantially change supply chains. most are back to normal out of China”

“I believe the virus will force companies, regulatory bodies, state and federal governments to become more insular in the long term with a broader net of suppliers and offtake partners.”

Crisis Management Planning will become part of company sustainability practices and methodologies

“I believe it should force a rethink of the supply chains. What we have in pace was developed without having anything like this in mind. I hope it is a rare event but it goes to show how vulnerable we all are.”

“Worldwide reduction in demand for platinum group metals emanating from a likely depressed vehicle market. Prolonged depressed commodity prices”