



FY25 INDUSTRY ASSOCIATION REVIEW

Summary of findings

Industry Association	Jurisdiction	Commentary	Alignment with South32
Aluminium Federation of South Africa (AFSA)	South Africa	<p>AFSA does not advocate for or against new energy coal or natural gas projects, and does not explicitly recognise the transitional role of natural gas in the energy mix. AFSA acknowledges the need to accelerate renewable energy deployment and modernise South Africa's energy grid to achieve net zero emissions by 2050.</p> <p>AFSA's public policy positioning references South Africa's net zero target and the importance of renewables, which is broadly aligned with the objectives of the Paris Agreement, though there is no explicit reference to the Paris Agreement or the IPCC scientific assessment.</p> <p>AFSA advocacy supports carbon pricing mechanisms such as CBAM to reduce emissions and address carbon leakage. AFSA acknowledges the role of government in setting climate targets and driving the transition to a low-carbon economy and emphasises the importance of government-industry collaboration in encouraging sustainable practices and environmentally conscious technologies.</p>	Policy positions and advocacy are, on balance, aligned, noting that AFSA's advocacy activity is minimal.
Arizona Mining Association (AMA)	Arizona, USA	<p>AMA recognises the importance of a diverse domestic energy mix for ensuring energy reliability and minimising market disruptions. AMA demonstrates clear advocacy for responsible mining practices, economic growth, and environmental stewardship, with emphasis on the critical role of minerals in supporting the energy transition and national security.</p> <p>AMA acknowledges climate change as a risk to the mining industry and associated communities. AMA supports policy solutions that are consistent with the objectives of the Paris Agreement and that facilitate production of minerals necessary for green and resilient infrastructure, while maintaining affordability and reliability.</p> <p>No evidence was found that AMA oppose principle-based carbon pricing mechanisms or carbon border adjustment measures. AMA's advocacy considers the socio-economic context of Arizona, recognising the importance of supporting workers and local communities, particularly in rural areas, through the energy transition.</p>	Policy positions and advocacy are, on balance, aligned.
Australian Aluminium Council (AAC)	Australia	<p>The AAC advocates for a diverse, low-emissions technology mix, with a focus on the transition to renewable energy. AAC recognises the transitional role of natural gas in the aluminium and alumina industries where alternatives are not yet commercially viable.</p> <p>AAC demonstrates advocacy for achieving net zero emissions by 2050, supports Australia's commitment to the Paris Agreement, and acknowledges the scientific evidence of global warming as reported by the Intergovernmental Panel on Climate Change. AAC's public policy positioning is aligned with the objectives of the Paris Agreement and is technology neutral, emphasising the need for policy certainty, reliable low-emissions electricity, and international competitiveness.</p> <p>AAC acknowledge carbon pricing as a policy instrument and advocates for consistent application across jurisdictions and the need to address carbon leakage, however with a cautious stance on application of a border carbon adjustment for Australia's export-oriented aluminium sector. The Council supports the use of high-quality carbon credits for hard-to-abate emissions, subject to integrity standards.</p> <p>AAC's advocacy recognises the socio-economic impacts of the energy transition on workers and communities AAC also advocate for robust biodiversity conservation and responsible water stewardship.</p>	Policy positions and advocacy are, on balance, aligned.
Business Council of Australia (BCA)	Australia	<p>BCA has advocated in support of approval of an extension of existing gas projects, such as the North West Shelf in the context of recognising natural gas as a key transitional energy source in Australia's move towards net zero. There is no evidence of support for new gas projects. BCA frames natural gas as preferable to coal during the transition period but supports a technology-neutral approach to energy policy.</p> <p>BCA advocacy is aligned with the objectives of the Paris Agreement. Public policy advocacy highlights the need to develop a non-partisan national Net Zero Roadmap, setting ambitious Nationally Determined Contributions (NDCs), government action to facilitate investment in low-emission technologies, reskilling of regional workforces, and ensuring an orderly transformation of the economy.</p> <p>BCA does not explicitly advocate for principle-based carbon pricing, however evidence indicates support for carbon border adjustment mechanisms. BCA recognise the importance of carbon offsets but prioritise removal-based reductions.</p>	Policy positions and advocacy are, on balance, aligned.
Chamber of Minerals and Energy (CME)	Western Australia, Australia	<p>CME has advocated support for approval of an extension of existing gas projects, such as the North West Shelf, in the context of recognising natural gas as a key transitional energy source in Australia's move towards net zero. There is no evidence of support for new gas projects.</p> <p>CME demonstrates advocacy for achieving net zero by 2050, in line with the Paris Agreement objectives, and maintains a technology-neutral, least-cost abatement approach to emission reductions. CMEWA advocates for government-led frameworks to drive emissions reduction, while emphasising the need for a just transition, workforce development, and holistic environmental reforms.</p> <p>CME supports transparent, economy-wide carbon price mechanisms, advocating for robust carbon markets, and recognising the need for safeguards to maintain competitiveness and prevent carbon leakage.</p>	Policy positions and advocacy are, on balance, aligned.
Asociación Colombiana de Minería (ACM) (Colombian Mining Association)	Colombia	<p>ACM's advocacy emphasises the need for investment, sector growth, and coal's central role in Colombia's energy mix and mining exports.</p> <p>ACM supports sustainable mining initiatives of members, however advocacy reflects resistance to the Colombian government's commitment to phase out fossil fuels and promote economic diversification, emphasising the need to protect jobs and regional economies tied to coal.</p> <p>ACM statements do not advocate for policies that promote renewable or low-carbon energy sources, nor do they mention support for a just energy transition. ACM expresses concern about policies that could negatively impact coal and mining, and the livelihoods of people and communities depended on coal and mining.</p>	<p>Elements of ACM's climate policy advocacy are inconsistent with our climate change positions.</p> <p>In Colombia, as a developing country and consistent with the Paris Agreement, it is reasonable to consider the unique challenges and significant investments required for a just transition to a low-carbon and climate-resilient economy.</p> <p>South32 will cease to be a member of ACM following completion of the sale of Cerro Matoso, which is expected to occur in late CY25, subject to the satisfaction or waiver of certain conditions.</p>
Energy Council of South Africa (ECSA)	South Africa	<p>ECSA acknowledges South Africa's continued reliance on coal for energy security but emphasises the need to reduce coal dependence and transition to renewables, natural gas, and low-carbon technologies. ECSA recognises the role of natural gas as a transitional fuel.</p> <p>ECSA demonstrates clear advocacy for achieving net zero by 2050, with public policy positioning aligned to the Paris Agreement and South Africa's NDCs and supports a just transition for coal-dependent communities.</p> <p>ECSA supports carbon pricing as a tool for decarbonisation, though it advocates for a gradual approach suited to South Africa's context as a developing country, including low economic growth, energy security and high unemployment.</p>	Policy positions and advocacy are, on balance, aligned.
Energy Intensive Users Group of Southern Africa (EIUG)	South Africa	<p>EIUG does not advocate for new energy coal or natural gas projects. EIUG demonstrates support for a decarbonised energy mix and enabling 'own use' generation, with advocacy focused on achieving reliable and affordable electricity.</p> <p>EIUG acknowledge that climate change requires policy action, however there is no explicit reference to the Paris Agreement or the IPCC scientific assessment.</p> <p>EIUG's public policy positioning recognises the need for a just transition, balancing economic growth, energy security, and environmental sustainability, and supports carbon pricing as a tool for decarbonisation.</p>	Policy positions and advocacy are, on balance, aligned, noting that EIUG's advocacy activity is minimal.
Industrial Gas Users Association (IGUA)	South Africa	<p>IGUA advocates for new gas projects by highlighting the urgent need for LNG infrastructure development, government action to underwrite investment risks in gas infrastructure, and proposing the formation of a gas aggregator company to pool industrial demand and secure new gas supplies. However, IGUA advocacy recognises the transitional role of natural gas in South Africa's energy mix.</p> <p>IGUA's public policy positioning references South Africa's net zero target and the importance of renewables, which is broadly aligned with the objectives of the Paris Agreement. However, its advocacy is primarily focused on ensuring continuity of gas supply, economic stability, and industrial competitiveness, with limited explicit support for broader climate policy, carbon pricing, or just transition principles. Its advocacy does represent an awareness of the importance of supporting affected workers and communities dependent on the gas industry.</p>	<p>Policy positions and advocacy are, on balance, aligned, noting our position that we do not support advocacy for new natural gas projects without appropriate qualification.</p> <p>In South Africa, as a developing country and consistent with the Paris Agreement, it is reasonable to consider the unique challenges and significant investments required for a just transition to a low-carbon and climate-resilient economy.</p> <p>We participate in IGUA in this context and engage as per the process outlined in Our Approach to Industry Associations.</p>
Minerals Council Australia (MCA)	Australia	<p>MCA advocates for a technology-neutral approach to energy, supporting all options including renewables, nuclear, gas, and coal with carbon capture and storage.</p> <p>MCA's advocacy is limited to support for approval of extension or modification of existing coal projects. Similarly, MCA has advocated support for approval of extension of the existing North West Shelf project and in the context of recognising natural gas as a key transitional energy source.</p> <p>MCA demonstrates advocacy for achieving net zero by 2050, supports public policy aligned with Paris Agreement objectives, and acknowledges climate science and the need for a just transition.</p> <p>MCA supports carbon pricing mechanisms, including efficient design of the Safeguard Mechanism to avoid carbon leakage and maintain competitiveness. MCA advocates for least-cost abatement and credible international carbon markets.</p> <p>MCA advocates for improved environmental management practices, including biodiversity, water, and land management, but emphasises the need for streamlined regulatory approvals.</p>	Policy positions and advocacy are, on balance, aligned.
Minerals Council South Africa (MCSA)	South Africa	<p>MCSA recognises coal's current role in South Africa's energy mix and the need for a pragmatic, just energy transition. MCSA demonstrates clear advocacy for achieving net zero by 2050, supports the Paris Agreement objectives, and promotes a country-specific, people-centred energy transition.</p> <p>MCSA actively engages in public policy on carbon pricing, advocating for balanced, sector-appropriate implementation.</p> <p>MCSA public policy advocacy includes government reforms in relation to emission reduction targets, water stewardship, biodiversity, and just energy transition, seeking regulations that enable decarbonisation and nature protection while supporting a sustainable, competitive mining sector.</p>	Policy positions and advocacy are, on balance, aligned.
National Mining Association (NMA)	United States	<p>NMA advocates for maintaining and increasing utilisation of the existing coal power plant fleet. NMA strongly oppose regulatory efforts mandating emission reduction, which will lead to closure of existing coal plants.</p> <p>NMA does not have a clear position on alignment with objectives of the Paris Agreement or acknowledgement of climate-science.</p> <p>NMA's advocacy does not address the need for a just energy transition, but focuses on resisting regulatory change that will negatively impact the mining industry.</p>	<p>Elements of NMA's climate policy advocacy are inconsistent with our climate change positions.</p> <p>We participate in NMA in this context and engage as per the process outlined in Our Approach to Industry Associations.</p>
Queensland Resources Council (QRC)	Queensland, Australia	<p>QRC supports investment in new exploration and production of gas, acknowledging that the gas sector plays a pivotal role in the transition to net-zero emissions and in ensuring energy security. QRC does not advocate investment in new domestic unabated coal-fired power generation.</p> <p>QRC demonstrates support for net zero by 2050, alignment with the Paris Agreement objectives, and supports the government net zero by 2050 target, promoting cost-effective state policies for emissions reduction.</p> <p>QRC indicate support for carbon pricing as a mechanism to drive emission reductions by advocating for a market-based approach.</p> <p>QRC's advocacy recognises the elements of a just transition.</p>	<p>Policy positions and advocacy are, on balance, aligned, noting our position that we do not support advocacy for new natural gas or energy coal projects without appropriate qualification. QRC's advocacy in this regard requires ongoing monitoring and discussion.</p> <p>We participate in QRC in this context and engage as per the process outlined in Our Approach to Industry Associations.</p>
South African National Energy Association (SANEA)	South Africa	<p>SANEA recognises South Africa's heavy reliance on coal and the need for a balanced energy mix, including renewables and cleaner fossil fuel energy during the transition while also acknowledging the importance of technological innovation. SANEA acknowledges the transitional role of natural gas as a bridge between coal and renewables and supports the use of cleaner technologies to minimise environmental impact.</p> <p>SANEA's public policy positioning is aligned with the Paris Agreement objectives.</p> <p>SANEA promotes regulation that balances low and carbon-free energy adoption with maintaining reliability of supply and supporting access and system security.</p> <p>SANEA acknowledge the use of carbon pricing and taxes to incentivise emissions reduction, especially in high-emission sectors.</p>	Policy positions and advocacy are, on balance, aligned.