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OUR MINING SECTOR IS CHANGING

*How is it changing? Who's most
impacted? And what can you do
about it?*



ACKNOWLEDGMENT OF COUNTRY

Geophytes acknowledges Australia's First Nations Peoples as the Traditional Owners and custodians of this land and gives respect to their Elders — past and present — and through them to all Aboriginal and Torres Strait Islander people.

This report was conceived and written on Gadigal land of the Eora nation.

About Us

What is Geophytes?

Geophytes is a grassroots organisation working to create a mindset that establishes a synchronous relationship between the environment and its inhabitants.

Our Name

A geophyte (geo = earth, phyte = plant) is a plant with an underground storage organ. This storage organ helps the plant survive adverse environmental conditions such as cold, drought or even fires. Like our namesake, we aim to nurture the potential within communities, to build resilience and thrive even in challenging circumstances.

We Advocate

At Geophytes, we advocate for:

- Economic diversification in mining-dependent regions
- Education and skills training programs tailored to local needs and opportunities
- Environmental restoration and protection in post-mining landscapes
- Policies that support community-led development initiatives

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Summary

Muswellbrook, a coal mining town in the Hunter Valley, has been significantly shaped by its relationship with the coal industry for over 117 years. This report examines the complex relationship between the town and the mining industry, exploring its importance and the challenges that lay ahead.



A Spotlight on Australia's Mining Sector

Economic Reality Check

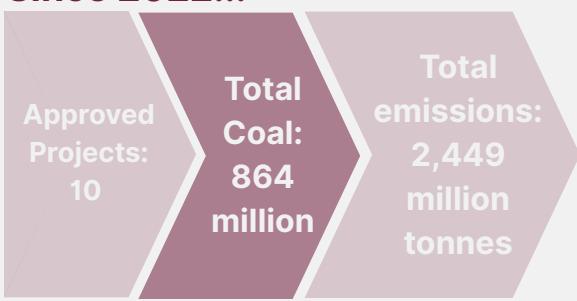
The Hunter Region faces significant challenges as Australia's coal industry transforms.

- AGL's Liddell Power Plant and Muswellbrook Coal have already closed.
- BHP's Mt Arthur mine will close by 2030 (BHP Group [BHP], 2024).
- Bayswater power station is scheduled to close before 2035 (Clean Energy Regulator, 2025).
- All coal stations are projected to close by 2038 (University of New South Wales, 2023).

Reducing coal production improves Muswellbrook's air quality and public health while creating opportunities for new industries (Campbell, 2014a). However, this transition needs careful planning to protect the community's economic wellbeing (MacNeil & Beauman, 2022).

Historical examples of unplanned mine closures have had severe community impacts including job losses, collapsed housing markets, eroded public services, and abandoned mine sites with environmental hazards (Beer, 2018).

Since 2022...



Recently Approved Coal Projects

Despite the broader transition away from coal, several new mines have been approved since 2022 (see figure 1) (Environmental Justice Australia, 2024):

- **Mount Pleasant Optimisation Project:** Set to become Australia's largest black coal mine.
- **Glendell Continued Operations Project.**
- **Hunter Valley Operations Continuation.**
- **Mangoola Coal Continued Operations Project.**
- **Whitehaven Coal's Narrabri** coal mine expansion
- **MACH Energy's Mount Pleasant** Optimisation coal expansion.
- **Yancoal's Ashton** coal expansion.
- **Caval Ridge** coal expansion.
- **Lake vermont** coal expansion.
- **Boggabri** coal expansion.



Figure 1: Recently Approved Mine Expansions map.

Contradictions

Australia's coal mining approvals appear contradictory to their net-zero by 2050 climate commitments and energy transition goals.

JUSTIFICATION FOR APPROVALS	REALITY CHECK
Energy demands	<ul style="list-style-type: none">Renewable energy can meet demands at a lower longer-term cost (Department of Climate Change, Energy, the Environment and Water [DCCEEW], 2025).Coal is finite, meaning the coal will run out.
Short-term economic benefits and job preservation	<ul style="list-style-type: none">Mining is a relatively minor industry in terms of employment, with only about 2.2% of the total workforce holding their main job in this sector (Jobs and Skills Australia, 2025).It is economic logic to make the inevitable switch to renewables now as it will only cause greater disruptions and higher costs if it is rushed in the future.<ul style="list-style-type: none">Insurance companies are changing their business structures to accommodate for climate change risks (see Golnaraghi, 2018, for extensive examples and case studies).Employees remain tied to a declining industry with no meaningful long-term support or transition planning.
Meeting ongoing export demands from Asian markets	<ul style="list-style-type: none">China (Australia's biggest coal customer) now leads global renewable energy production.China is pioneering coal-free steelmaking (Hilton, 2024; Nicholas, 2024).
Claims of using "cleaner" mining technologies	<ul style="list-style-type: none">Burning Fossil fuels accelerates climate change, severely degrading ecosystems and potentially rendering our planet uninhabitable for future generations (see p. 12). <p>Government funding priorities reveal the disconnect:</p> <ul style="list-style-type: none">\$5.2 million: Support for coal communities transitioning to new industries.\$27 million: NSW government spending on coal research.\$700 million: Fund for largely <u>unproven</u> 'clean coal' technology (Simpson et al., 2024).

Who is in Control?

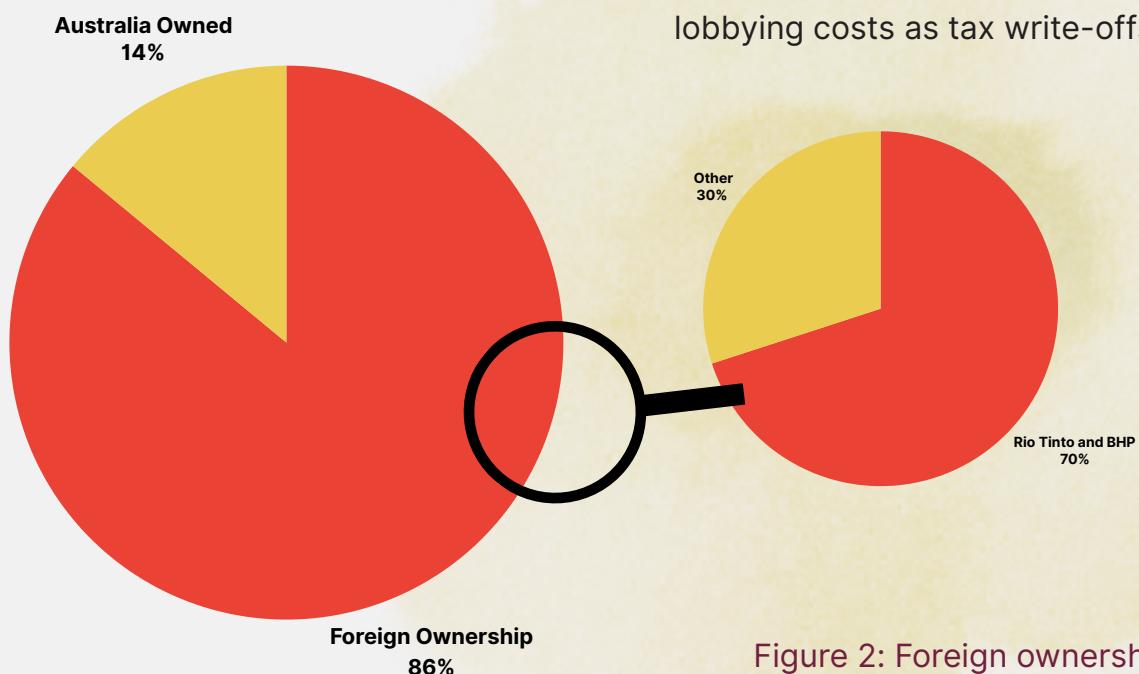
Australia's mineral wealth is legendary, but who really controls these vast resources? The answer might surprise many Australians.

The Ownership Landscape

Foreign entities dominate Australia's mining sector (see figure 1), controlling an overwhelming 86% of the industry with most of the profits going overseas (McKissack & Xu, 2016). This includes some companies that many Australians might assume are locally owned:

- BHP: 76% foreign ownership
- Rio Tinto: 83% foreign ownership
- These two giants alone represent 70% of the resources held by mining companies listed on the Australian Stock Exchange (Edwards, 2011).

The Australian Treasury found less than 10% of active mining operations have complete Australian ownership (McKissack & Xu, 2016).



Lobbying and Influence

Over the past decade, mining companies have poured over half a billion dollars into lobbying efforts targeting Australian governments (Aulby, 2017). This figure only accounts for spending through major industry groups, which are largely controlled by overseas interests.

However, the amount spent on lobbying is likely much higher, as it does not include direct lobbying expenditures by individual mining firms, which aren't required to be disclosed publicly (Aulby, 2017).

Foreign mining companies shape Australian policy through lobbying and political donations, mainly to reduce their taxes and regulations. The following was done through lobbying:

- Mining companies spent around \$100 million fighting the Minerals Resource Rent Tax (2010-2012), which cut tax revenue by \$5.3 billion (Davis, 2011).

These companies then claimed their lobbying costs as tax write-offs.

Figure 2: Foreign ownership model.

Revolving Door

The revolving door of politics occurs when government officials take jobs in private companies after making decisions that benefited those same industries while in office. It is most clearly represented within the natural resource industries.

After leaving their position, former Australian Government ministers are prohibited from lobbying the federal government for a period of 18 months under the current code of conduct.

Since 2001, every resources minister in Coalition and Labor governments has gone to work in the fossil fuel sector. Creating a revolving door of extractive economic policies that empower 'non-renewable' agendas within government.

Such examples are presented below:

Ian Macfarlane was the Liberal Minister for Industry and Resources in the Howard and Abbott governments. Once leaving politics was appointed the CEO of the QLD Resource Council 2016 (Henderson & Bradfield, 2016).

Gary Gray was the Labor Resources Minister in 2013 and once leaving politics was appointed the General Manager of External Affairs of Mineral Resources (ABC News, 2013).

Martin Ferguson was the Labor Resources Minister from 2007-2013 and once leaving politics was appointed the Chairman of the National oil and gas lobby, Australian Energy producers (The Australian Institute, 2024).

Shadow Lobbying

Most lobbying in Australia happens undocumented. Political staffers freely switch between industry and government jobs without oversight, creating hidden channels where corporate interests shape policy away from public view. This isn't just an isolated case but a systemic problem built into how government and industry interact, with over 160 individuals documented moving between fossil fuel interests and government positions between 2007-2021 (Lucas, 2022, p. 7).

Transfer Mispricing

Transfer mispricing, is when companies undervalue exports to related parties in lower-tax jurisdictions to reduce Australian tax liabilities.

Such examples are presented below:

- **Glencore**, a major coal exporter, has been involved in transfer pricing disputes with the ATO, with the company settling a dispute in 2022 (Glencore Australia, 2022).

- **Rio Tinto** also settled a transfer pricing dispute with the ATO, agreeing to pay nearly \$1 billion in additional tax (ATO, 2022).

- **BHP** has also settled a transfer pricing dispute with the ATO. They were taxed \$529 million to resolve the dispute, covering the years 2003–18 (BHP, 2018).

The Hidden Cost to Australian Taxpayers

The Financial Burden

Australian taxpayers are shouldering an enormous financial burden from the fossil fuel industry:

- Foreign mining companies have claimed a minimum of \$162.4 million in tax deductions for their lobbying expenses over the past decade, effectively shifting these costs to Australian taxpayers (Aulby, 2017).
- Australian governments provided \$14.5 billion in direct fossil fuel subsidies during 2023-24 (Campbell et al., 2024b).
- This does not include the \$55.6 billion in implicit subsidies, with taxpayers footing the bill for premature deaths and poor health caused by air pollution, as well as environmental damage and climate change effects (Foley, 2023).

The **fuel tax credit scheme** costs the federal government nearly 10 billion per year, and is ranked 15 in government spending. The majority of credits being allocated to coal and iron ore companies under the federal budget (The Australian Institute, 2025).

The International Monetary Fund (IMF) has raised concerns that current pricing systems fail to account for these environmental and health impacts properly- sometimes not even covering basic production costs (IMF, 2023, as cited in Foley, 2023). The health impacts are particularly severe, data from the Institute for Health Metrics and Evaluation shows that air pollution from burning fossil fuels leads to approximately 4.5 million early deaths worldwide each year (Foley, 2023).

International examples highlight the potential for better returns: Norway captures 78% of oil profits through taxation.

Royalties

Coal belongs to the people of NSW until mining companies buy it through royalties.

In NSW, mining companies pay a flat rate between 8.2%-7.2% royalties depending on the coal (Revenue NSW, n.d.) This contrasts with more effective models like Queensland's tiered system, which adjusts rates based on coal prices to optimise public benefit while maintaining the mine's viability (Department of the Premier and Cabinet, 2024).

Mining Industry Scandals



Key Finding

Mining companies' influence over politicians lead to favourable tax laws, demonstrating systemic abuse of power for private gain.



Tax Avoidance

The Australian government successfully recovered \$6.4 billion in taxes from big mining and fossil fuel companies in 2023 (Australian Taxation Office [ATO], 2023). This record-breaking collection included major payments from companies like Rio Tinto and Ampol, who had to settle their dodgy tax-avoiding.



License Misconduct

In 2021, former NSW Resources Minister Ian Macdonald and Labor's Eddie Obeid were found guilty of conspiring a 2009 coal license process. The Supreme Court ruled Macdonald rigged a mining tender to help the Obeid family gain \$30 million in profits (Grigg, 2021).



Environmental Damage

A 2019 NSW Resources Regulator inspection found four Hunter Valley mines violating their land rehabilitation requirements. Despite these breaches, no fines were issued (NSW Resources Regulator, 2019). In fact, no Hunter Valley mine has ever been penalised for failing to meet rehabilitation standards, while mines in other parts of NSW have only received minimal fines well below the maximum penalty.

The Future of the Mining Industry

Mining remains crucial for supplying the minerals needed for clean energy technologies. Australia's abundant critical mineral resources and established mining infrastructure provide a natural pathway for communities and workers to shift from traditional coal mining to sustainable resource extraction.

Projected Global Demand by 2050 (Bruce et al., 2021)

- 9 million tonnes of lithium for energy storage
- 130 million tonnes each of silicon (EVs) and copper (wind turbines)
- 48 million tonnes of nickel for batteries

Australia's Strategic Position

- World's largest lithium producer
- Third-largest cobalt producer
- Fourth-largest rare earth producer
- 81 major critical minerals projects in development (valued at \$30-42 billion)
- \$23 billion government commitment to domestic manufacturing and processing

Employment and Economic Opportunities

- Current resources sector employs 290,000 people (14% of GDP) (Office of the Chief Economist, 2022)
- Projected new jobs in critical minerals:
 - 115,000 jobs in mining and extraction (Department of Industry, Science and Resources [DISR], 2023).
 - Up to 262,600 jobs with expanded processing capabilities (DISR, 2023).

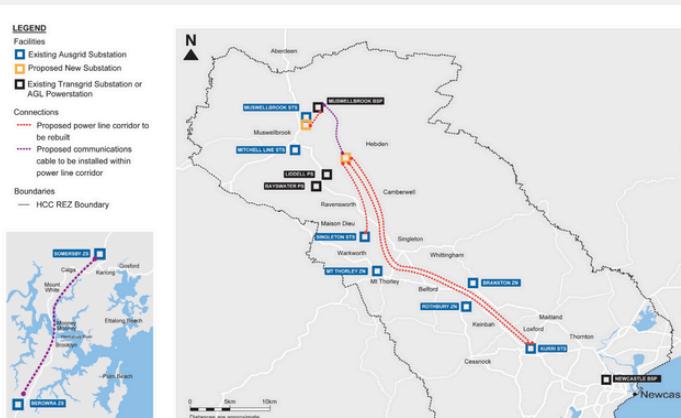
Market Dynamics

- Global EV sales projected to reach 60% market share by 2030 (International Energy Agency [IEA], 2022b)
- Lithium demand expected to increase 40-fold by 2040 (IEA, 2021)
- New infrastructure needed globally (IEA, 2022a):
 - 50 new lithium mines
 - 60 new nickel mines
 - 17 new cobalt mines

Hunter-Central Coast Renewable Energy Zone Development

EnergyCo, in collaboration with Ausgrid, is enhancing the existing power network to support new renewable energy generation projects in the Hunter-Central Coast region (EnergyCo, 2024).

Figure 3: Hunter-Central Coast REZ proposed network project [Map]. (2024). EnergyCo.



As evidenced above, it is possible to support the transition out of coal mining while maintaining Australia's resource industry strength and contributing to global clean energy goals.

Infrastructure & Community Challenges: Hunter

Current Regulatory Issues

- Inadequate mine closure and rehabilitation regulations in NSW.
- 25+ unfilled mining voids creating environmental hazards in the Hunter region.
- Low penalties for rehabilitation non-compliance (maximum \$1.1 million)
- Inconsistent government policy on industry transition

Economic Disconnect: Case Study Muswellbrook

When it comes to mining and community investment - the numbers do not add up.

- Local coal production generates \$810 million in royalties p.a (Buckingham, 2023).
- Government transition fund commitment: only \$25 million total.
- Limited long-term community development despite high industry profits.
- Minimal investment in alternative industries like hydrogen.
 - "toe in the water" commitment (Reynolds, Mayor of Muswellbrook).

The Hunter Valley (excluding Newcastle) has a population of 291,946 (Australian Bureau of Statistics [ABS], 2021). Of that, 14,919 individuals are directly employed by coal mines, 5% of the possible working body (McCarthy, 2024).

Skills Training

TAFE NSW needs more funding to skill shift employees to a renewable market. Years of budget cuts have limited its ability to help Hunter Valley workers transition to long-term careers in growing sectors. More specifically, a \$196 million shortfall threatens NSW skills sector (NSW Government, 2023).

Drive-In and Drive-Out Employees

The mining industry's focus on temporary workers in Muswellbrook has created a divided community. While infrastructure serves the transient workforce, permanent residents face deteriorating services, environmental issues, and serious social challenges.

Required Investment to leave coal

- Triple renewable energy capacity by 2030 (Australian Energy Market Operator [AEMO], 2024, p. 11).
- Six-fold capacity increase by 2050 (AEMO, 2024, p. 11).
- 60,000 jobs created over 20 years (AEMO, 2024, p. 8).

Hunter Valley Renewable energy and community rehabilitation initiatives could generate \$3.7 billion in economic benefits over the next two decades, while creating significant new opportunities for local investment and development (Hunter Renewal, 2023).

Mining companies continue to prioritise profits over community investment. Despite generating billions in revenue, these companies face minimal government pressure to support local development or fund transition planning. The lack of legislative oversight allows them to avoid long-term responsibility for community wellbeing.

The Transition to a Community Led Future

To combat misfortunes brought by the decline in coal, actors have pushed the notion of 'just transitions' (JT) whereby policies targeting to help these regions maintain their social and economic integrity (Edwards et al., 2022). Initiatives include retraining for displaced workers, early retirement incentives for older workers, laws preventing forced redundancies, and transition programs designed to help families through periods of unemployment.

Current Transition Assets

- Existing Infrastructure
- Strategic Location
- Industry Capability
- Pioneer Spirit

Renewable Energy Initiatives

1. Power Generation
 - Wind and solar projects
 - Santos Hunter Gas Pipeline
 - Pumped Hydro facilities
 - Battery storage systems
 - Hydrogen generation plants
2. Key Partnerships
 - Energy Co. - Hunter Renewable Energy Zone
 - Department of Regional NSW
 - AGL Liddell and Bayswater transition

Community Voices

Research by MacNeil & Beauman (2022) interviewed 37 workers from Australia's largest coal regions, Queensland's Bowen Basin and New South Wales' Hunter Valley revealed critical insights about what people thought about JT and how the transition out of coal should be addressed.

Common Concerns

"Just Transition" often perceived as:

- ✗ Euphemism for job loss
- ✗ Externally driven agenda
- ✗ Threat to local autonomy
- ✗ Lacking concrete plans

Hunter Renewal (2023), has conducted various workshop and composed of community members to create a blueprint for the future. The following properties are inspired by both previously mentioned studies:

01 Local Empowerment

- Community-driven decision making
- Independence from mining corporations
- Sustainable economic diversification

02 Transparent Communication

- Clear implementation roadmap
- Well-resourced action plans
- Regular community updates

03 Holistic Approach

- Environmental protection
- Community health focus
- Indigenous collaboration
- Economic sustainability

What's all this Change About?

Understanding Climate Change

Climate change is a long-term shift in temperatures and weather patterns (United Nations [UN], n.d.). Over the last 200 years, scientists agree that humans have been the main cause. Here's how it happens:

1. When we burn fossil fuels (coal, oil, and gas), they release greenhouse gases.
2. These gases trap the sun's heat in Earth's atmosphere.
3. This trapped heat raises global temperatures.

A Community at the Crossroads

For nearly 30 years, Muswellbrook has been vital to NSW's coal mining industry, powering homes and businesses across the state. But now this community faces new challenges:

- The 2023 bushfires threatened Muswellbrook, Aberdeen, Scone, and nearby areas (Parmeter et al., 2023).
- These disasters are linked to rising CO₂ emissions.

Impact of Bushfires in the Hunter Region

Infrastructure Damage

- 22,700 hectares affected.
- 15,663 buildings destroyed.
- Recovery and rebuilding can take over 2 years.
- The 2019 southeastern Australian fires displaced 65,000 people and destroyed 3,100 homes.

Health Effects (2019-2020 Season)

Poor air quality from bushfires led to:

- 25 premature deaths.
- 38 cardiovascular disease hospitalisations.
- 129 respiratory disease hospitalisations.

Looking Ahead

Scientists predict that under a high emissions scenario, severe fire weather days will double by 2090, putting more communities at risk (DCCEEW, 2024).

Upskilling in New Economy

A Comprehensive Resource Guide

NSW Government Initiatives

Public Sector Training Programs:

NSW Public Sector Apprentices Program (NSW Government, n.d.)

- 1,000 new positions
- Government agency placements

Local Government Training (NSW Government, 2024)

- \$252.2M investment
- 1,300 positions

Educational Resources:

TAFE NSW Programs (TAFE NSW, n.d.)

- Smart and Skilled Program
 - Fee-free apprenticeships
 - Subsidised training

Paid to Learn Program (Office of Veterans Affairs, n.d.)

- 14-week VET teaching transition
- Industry professional pathway

Muswellbrook TAFE (TAFE NSW, n.d.)

- Local training provider
- Industry-focused programs

Centers of Excellence:

Tafe (TAFE NSW, n.d.)

- Western Sydney
- Hunter Region
- Illawarra Area

Industry Programs

Essential Energy Apprenticeships (Essential Energy, n.d.)

- 92% retention rate
- Comprehensive training

Hydrogen Centre of Excellence (NSW Department of Planning and Environment, 2024)

- \$25M investment
- PICAC partnership

Training Organisations:

Group Training Organisations (Australian Government Department of Employment and Workplace Relations, n.d.)

- Apprentice placement
- Employer support

Youth Programs:

Get Back in the Game (NSW GOV, 2025)

- Youth transition support
- Education pathways

Resource Hubs

Clean Energy Resources:

Verto Resource Library (VERTO, 2025).

- Industry news
- Event information
- Training resources

Note: All links are current as of 2024.

Programs and offerings may change - always verify details through official websites.

Union Representation in Energy Transition

Understanding Your Rights and Options

Current State of Unions in Australia
Union engagement in Australia has declined significantly, falling from over 50% of the workforce in the 1970s to approximately 15% today (Australian Bureau of Statistics [ABS], 2024)

Impact of Decline

- ↓ Reduced collective bargaining power
- ↓ Decreased workplace representation
- ↓ Limited negotiation leverage
- ↓ Weakened worker protections

There is currently no dedicated union specifically focused on the renewable energy sector. This gap in specialised representation could affect worker attraction and retention in the growing clean energy industry, particularly as the sector requires unique skill sets and faces distinct workplace challenges.

Missing Elements in Clean Energy Sector

1. Industry Standards

- Workplace practices
- Safety protocols
- Job classifications
- Career pathways

2. Worker Protections

- Specialised training recognition
- Skill certification
- Fair wage structures
- Working conditions

Taking Action: Your Guide to Effective Community Advocacy

What is Grassroots Lobbying?

Lobbying means engaging with legislators to influence policy decisions. Whether you are an individual or an advocacy group, when you meet with representatives to elicit a policy change, you are lobbying them (Sivaraj, 2023). When approached from a community perspective, it becomes a powerful tool for change.

Action Pathways

1. Direct Communication

Patch-Through Calls

- Connect voters with representatives

Multi-Channel Approach

- Email campaigns
- Social media outreach
- Direct mail initiatives
- Phone banking

2. Community Leadership

- Build local awareness
- Organise community events
- Share success stories
- Connect with other advocates

3. Support Our Mission

Join us in nurturing the potential within mining-dependent communities, helping them grow strong roots for a sustainable future.

Connect With Us

Scan the QR code to tell us what you think!

- Instagram: geo.phytes, smalltowncoal
- 🌐 Website: geophytes.com



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