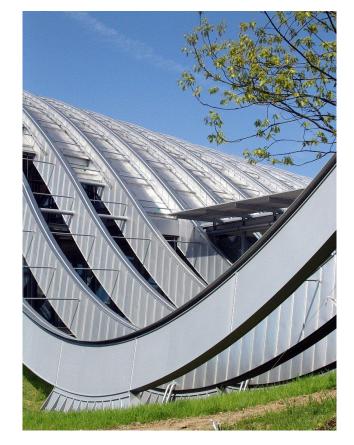




THE AUSTRALIAN STEEL INDUSTRY – OPPORTUNITIES FOR ENGAGEMENT WITH THE AUSTRALIAN FOUNDRY INSTITUTE





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About the Australian Steel Institute

The Australian Steel Institute (ASI) is the nation's peak body representing the entire steel supply chain, from the primary producers through to end users in building and construction, resources, heavy engineering and manufacturing.

A not for profit, member-based organisation, the ASI's activities extend to; advocacy and support, steel excellence, standards and compliance, training, events and publications. The ASI provides marketing and technical leadership to promote Australian-made and fabricated steel as the preferred material to the building, construction, resources, and manufacturing industries, as well as policy advocacy to government.

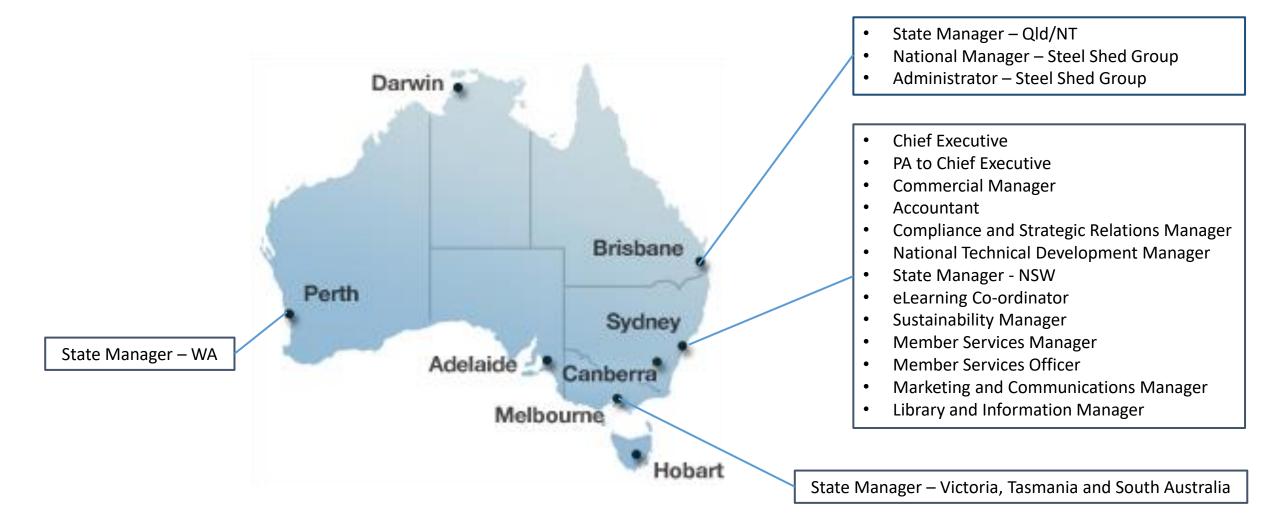








Our People Total of 18 Staff (full time and part time)





ASI Strategic Priorities

- Advocating for full, fair and reasonable trade
- The prevention of dumping to ensure Australian steel can compete
- Promoting the importance of quality, compliance and best practice (including standards, safety and logistics)
- Securing reliable and affordable baseload energy for Australian steel
- Promoting the steel capability agenda: Diversity, STEM, trades, the next generation and succession









Benefits to Australia

A vibrant steel industry is good for Australia's economy

The Australian steel supply chain employs over 100,000 people and generates revenues in the order of \$29 billion annually.

As a result, a strong Australian steel industry has a significant stimulus effect on the wider economy.

- Steel's multiplier effect sees as many as six workers employed in related industries for each person employed in the steel industry.
- In addition, for every \$1 million of steel revenue:
 - \$1.87 million is added to the economy
 - 16 FTEs are employed in the economy
 - o \$165,000 in welfare savings is realised
- \$590,300 is contributed to the national budget in tax revenue (State of Steel Report, Type I and Type II, page 4 and 5)



Representation



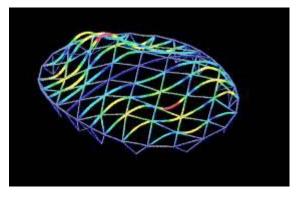
Australian Steel Institute

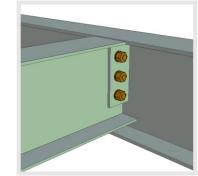




ASI membership covers full spectrum of steel industry:

- Steel mills
- Distributors
- Roll formers
- Fabricators
- Goods & service providers
- Galvanizers
- Detailers
- Specifiers
- Builders
- Educators





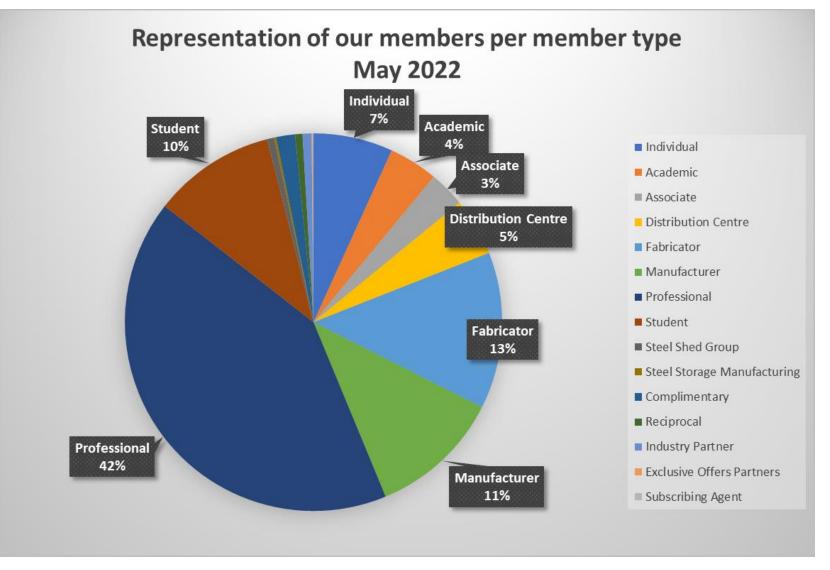




Classification of members

- Sustaining Member
- Manufacturing Member
- Distribution Centre Member
- Fabricator member
- Professional Member
- Associate Member
- Individual Member
- Academic Member
- Student Member

Total members 5,621 Total Reach 19,732 Member Accounts Total over 600





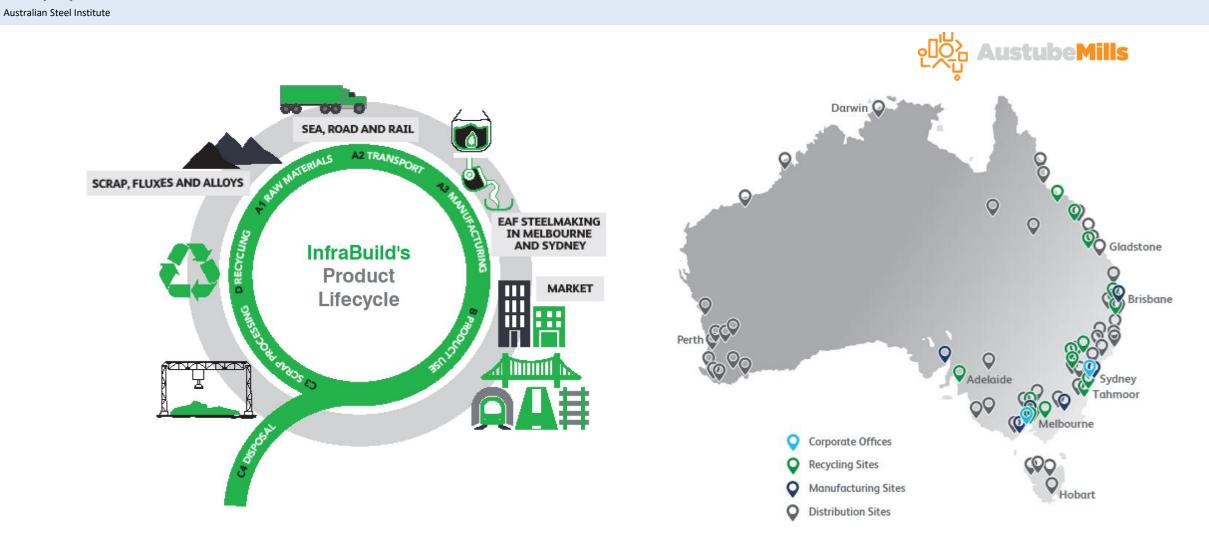
Australian steel producers employ both integrated and EAF routes

Company	Manufacturing Locations	Typical Production	Production Process
BlueScope	Port Kembla, NSW	3.2 million tonnes	Integrated : iron ore / coal / scrap steel Coke Ovens, Sinter Plant, Blast Furnace, BOF steelmaking
InfraBuild	Laverton, VIC	0.7 million tonnes	EAF route: scrap steel EAF steelmaking
	Rooty Hill, NSW	0.6 million tonnes	
Liberty Primary	Whyalla, SA	1.2 million tonnes	Integrated : iron ore / coal / scrap steel Coke Ovens, Pellet Plant, Blast Furnace, BOF steelmaking
Molycop	Waratah, NSW	0.25 million tonnes	EAF route: scrap steel EAF steelmaking

Approximately 90% of end-of-life steel products are collected and recycled in Australia*.

* CSIRO Metal recycling: The need for a life cycle approach - 2013

InfraBuild in Australia



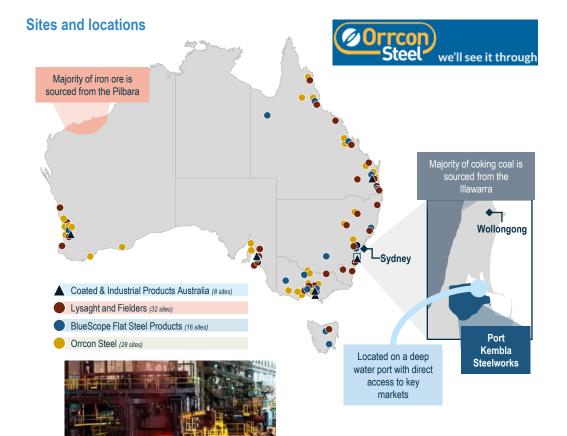


BlueScope in Australia

Integrated producer of premium branded flat steel products for the domestic Australian market

Key facts

- Produces hot rolled coil and plate through to branded, value-added metallic coated and painted products
- Established steelmaking asset at Port Kembla, with advantageous position close to high quality raw materials and port facilities
- Manufactures ~3.1 million tonnes per annum of flat steel products. 2.0 2.2 million tonnes sold domestically, with the balance sold on the export market
 - Approximately half of the exported volume goes to downstream affiliates on the US West Coast and in South East Asia
- · A range of iconic brands used across building market segments
- Extensive channels to market, including:
 - Lysaght and Fielders (rollformed steel building materials)
 - BlueScope Flat Steel Products (coil and plate distribution)
 - Orrcon Steel (pipe and tube manufacture and distribution)







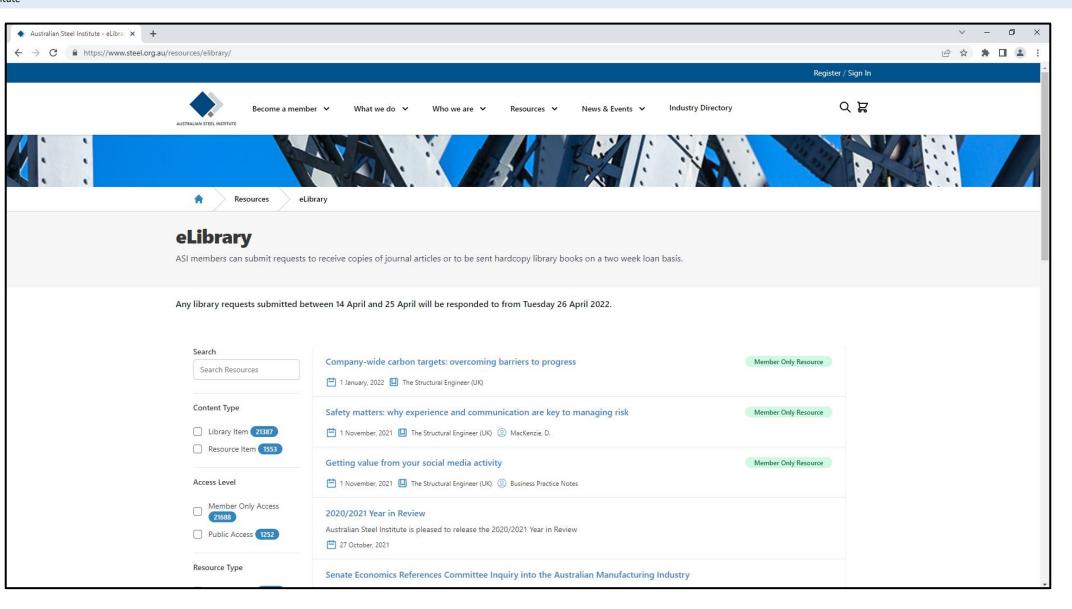
ASI Member Services

- Expert Advisory Services
- Technical Library
- Technical Presentations
- Seminars, Conferences & Conventions
- eLibrary
- eLearning
- Industry Directory
- Industry Survey Reports
- Website www.steel.org.au

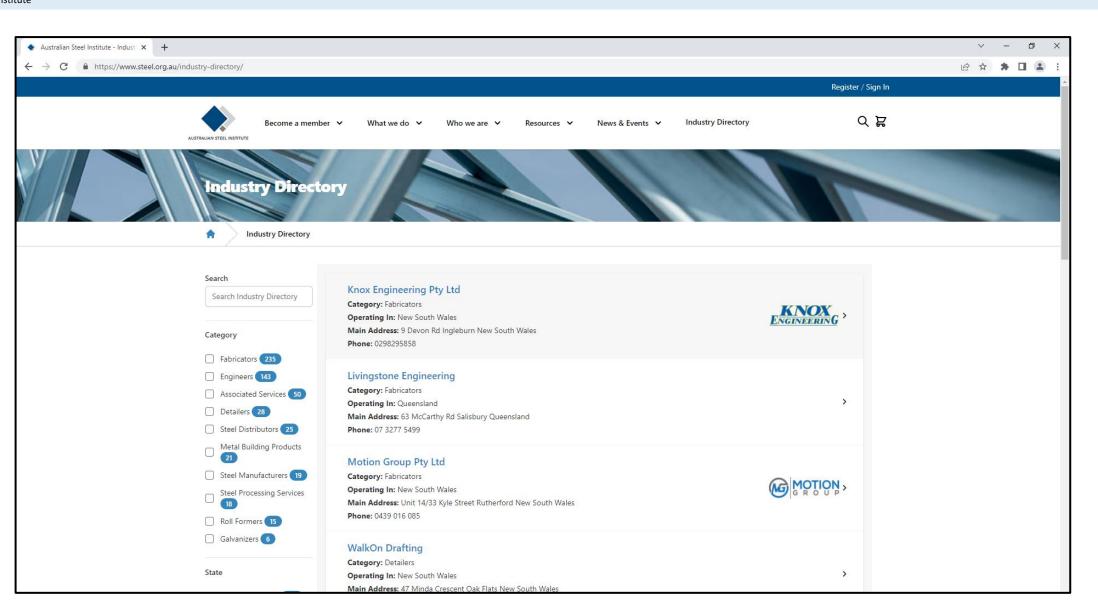




eLibrary



Industry Directory





ASI Key Initiatives

- eLearning system developed after conversion of previous continuous education programs for steel engineers about 3 years ago to On-Line courses.
- ASI provides seminars and courses to member companies so that further training can be offered to their employees which can assist professional development, employee retention and recruiting prospects.
- Industry certification schemes
- Local participation advocacy to State and Commonwealth governments to support member companies
- ASI Issues an annual "A Year in Review" report which summaries activities.



2020-2021: A YEAR IN REVIEW

THE AUSTRALIAN STEEL INSTITUTE (ASI) I DEDICATED TO EQUIPPING THE AUSTRALIAN STEEL INDUSTRY WITH THE TOOLS NEEDED TO NAVIGATE A CHANGING LANDSCAPE, QUALIFY, DIFFERENTIATE, COMPETE AND WIN BUSINESS WE WANT ALL OUR MEMBERS TO BE PREPARED T MAXIMISE THE OPPORTUNITIES PRESENTED BY THE CHANGING GLOBAL INDUSTRY IN WHICH TH OPERATE. THESE ARE THE OBJECTIVES THAT HAVE DRIVEN ALL OUR ACTIVITIES OVER THE 12 MONTHS

During 2020-2021, the Australian Steel Institute (AS continued to make progress in growing steel intensity and creating opportunities for local participation. Over the last 12 months, ASI continued its policy advocacy work acros various state jurisdictions. In the wake of the COVID-19 pandemic. ASI disseminated information to key stakeholde including Federal and State Governments on behalf of the Australian steel industry, focused on ensuring the steel industry was classified as 'essential' and that the supply chair

We also continued our work to promote AS/NZS 513 Structural Steelwork – Fabrication and erection and the National Structural Steelwork Compliance Scheme (NSSCS) as the quality benchmark for steelwork. Over 100 steel fabricators have been certified by Steelwork Compliance (SCA) to AS/NZS 5131, with an additional 40 currently in progress. This increased uptake demonstrates the growing demand for certification, particularly with governments taking a greater interest in compliance schemes and local content

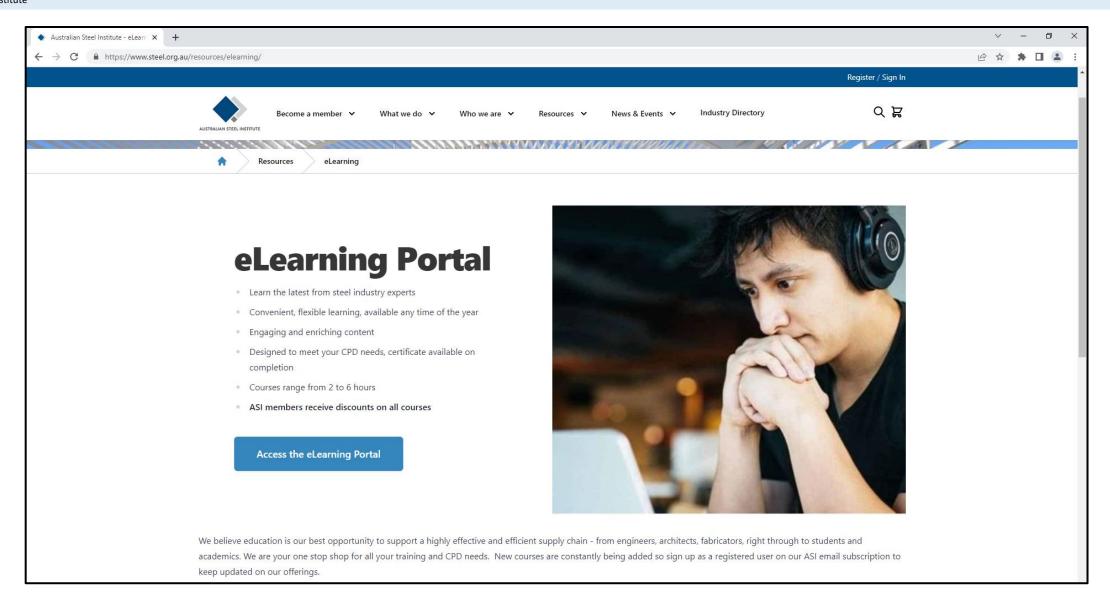
The Environmental Sustainability Charter (ESC) also experienced significant growth this year. More and more, ne buildings proponents, developers and state governments are specifying environmental certification as a key criteria in project tenders. There are now 71 ESC member companie

All this was achieved in conjunction with a variety of other projects, from the accelerated launch of our eLearning platform and a range of webcast seminars, through to the rollout of a fully digital award ceremony for the 2020 ASI Stee

2020-2021 | YEAR IN REVIEW

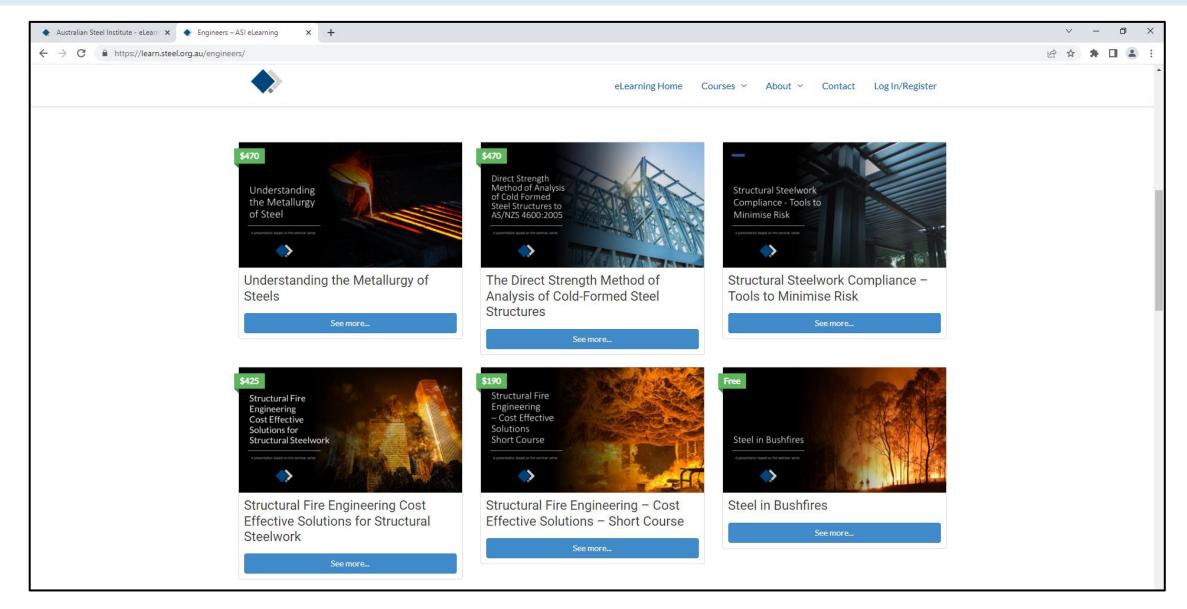
eLearning

Australian Steel Institute





Australian Steel Institute





eLearning Course Topics

The various ASI eLearning courses cover five broad topic areas:

Topic Area	Course Examples	
Structural Steel Design	 AS 4100 Refresher Course for Engineers Finite Element Analysis – Guide for Engineers and Managers 	
Composite Steel and Concrete Design	 Design of Composite Beams, Slabs and Columns Connecting Steel to Concrete 	
Fire Engineering	 Fire and Structural Steel Work Structural Fire Engineering Cost Effective Solutions for Structural Steelwork 	
Cold Formed Steel Design	 NASH – Essential Steel Framed Housing Guidance Design of Purlin & Girt Systems for Engineers 	
Corrosion Protection	- Corrosion Protection of Steel Structures for Engineers	

Browse the complete list of courses at <u>https://learn.steel.org.au/</u>



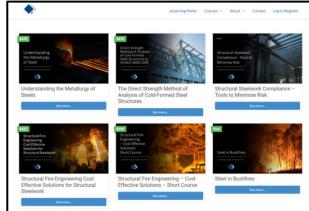
About ASI eLearning

The ASI eLearning system consists of:

- A user-friendly online platform that provides on-demand access to technical training;
- A suite of more than 30 courses that cover a range of steel design and detailing topics;
- Imbedded technical quizzes that periodically check user understanding prior to progressing;
- Facility to issue personalised certificates of completion via individual digital locker.

Each training course is comprised of:

- Recorded lectures delivered by expert speakers, in the form of multiple ~20 minute videos;
- Multiple choice quizzes at the completion of each sub topic;
- The majority of content is 'Full' courses, which range in duration from 2 to 6 hours;
- Downloadable course notes.





eLearning Subscription Model

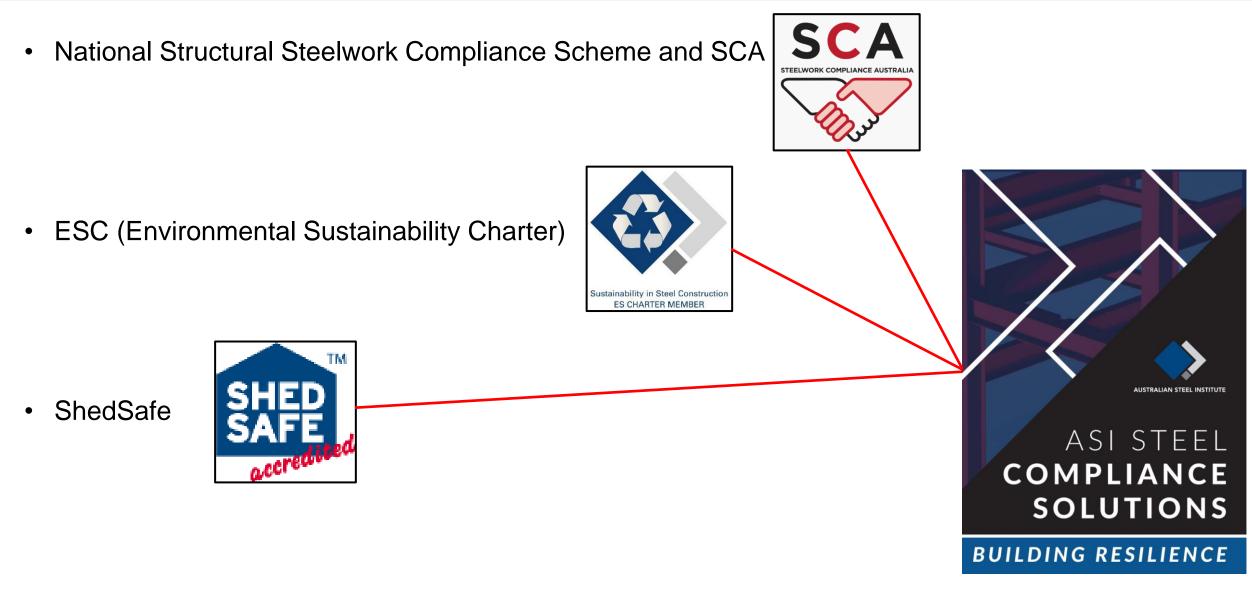
In order to cater for businesses that are seeking to flexibly train and upskill larger numbers of staff, a subscription access model has been created to make this both seamless and highly cost effective.

The key features of the subscription access model are:

- The entire suite of courses is made available to all nominated staff members;
- Individual staff members can gain 'free' access to courses via an ASI supplied discount code;
- The cost per course is based on the expected total annual usage, which is used to determine the level of discount that will apply;
- The subscription fee is paid as a one off annual amount which is calculated from the agreed course cost and expected annual usage;
- Access arrangements are documented in a supply agreement.

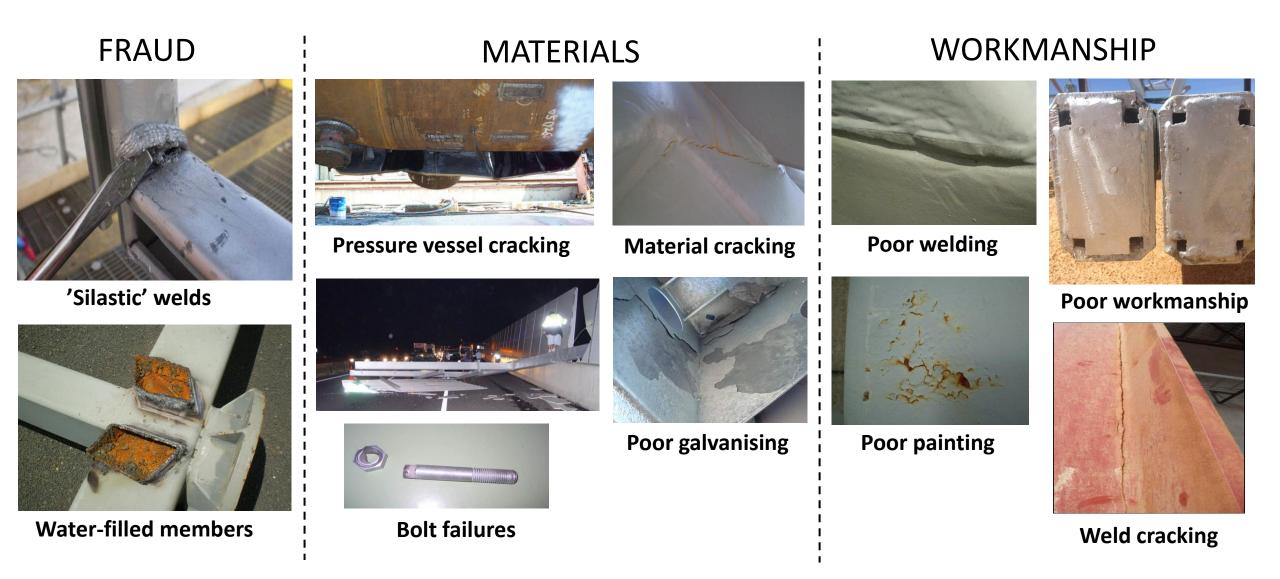


Certification Schemes





Problems to address to mitigate risk





National Structural Steelwork Compliance Scheme (NSSCS)

Australian Steel Institute



STEELWORK COMPLIANCE SIMPLIFIED

Under the new National Structural Steelwork Compliance Scheme (NSSCS), engineers and specifiers can get the intended steelwork structure as designed in just THREE EASY STEPS:



In your drawing notes and/or specification, specify AS/NZS 5131 Structural Steelwork - Fabrication and Erection. This will ensure all fabrication and erection is to the quality the Australian community expects.



Specify 'all steelwork used on this project is to be third-party certified'. This ensures an independent process to reduce non-compliance, minimise your risk and free up the time you require for detailed checking.

That's it.

You have taken the three simple steps to markedly improve your chances of ensuring compliant steelwork.



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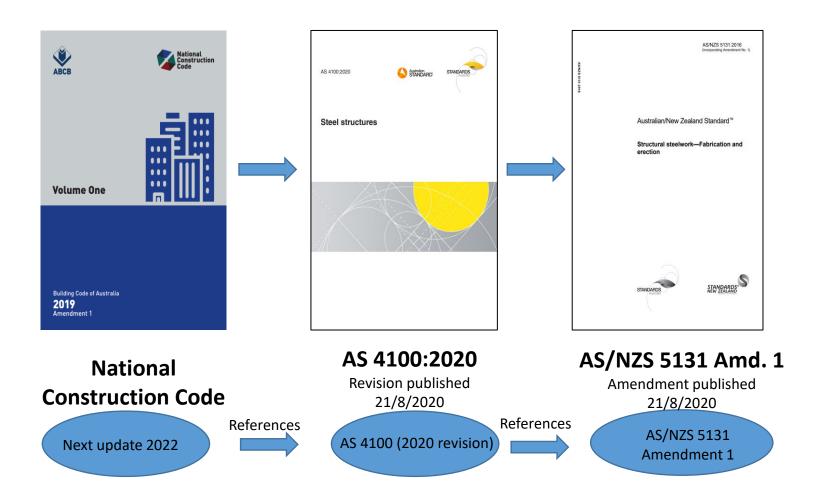
Make it easier still by adopting the new National Structural Steelwork Specification (NSSS) and Standard Drawing Notes which comprehensively implement the requirements of AS/NZS 5131.

This is a unique opportunity for Australia to standardise for increased efficiency and reduced project misunderstandings.

The NSSS and Drawing Notes are available for free download from http://steel.org.au/ key-issues/compliance/national-structural-steelwork-specification/

For more information, contact ASI National Technical Development Manager, Dr Peter Key on Tel: 02.8748.0186 or Email: peterk@steeLorg.au

Specify the Construction Category required for the work, either CC1, CC2 or CC3, as referenced in AS/NZS 5131. In most cases this will be CC2 and take literally five minutes to decide.



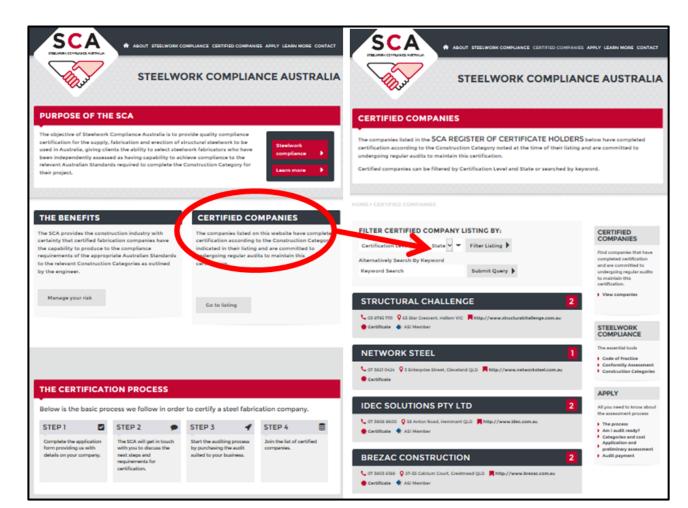
ASI Key Initiatives

Australian Steel Institute



SCA (Steelwork Compliance Australia)

- 110 + Steel Fabricators certified
- 50 + Steel Fabricators working towards certification



Superior Quality, Compliant, Structurally Sound Steelwork

Steelwork Compliance Australia (SCA) provides compliance certification for the supply, fabrication and erection of structural steelwork. SCA certification gives clients peace of mind that their steelwork fabricator has the capability to achieve compliance with Australian Standards, and deliver superior quality, structurally sound steelwork,

SCA

Need further information? Looking for advice? Want to get certified?

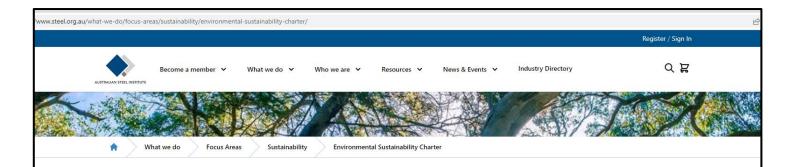
Contact Steelwork Compliance Australia: www.scacompliance.com.au +61 2 8748 0180 sca@scacompliance.com.au



ESC (Environmental Sustainability Charter)



- Current total ESC members is 68
- +50% growth in ESC membership since 2018



Environmental Sustainability Charter

The Environmental Sustainability Charter (ESC) is a certification scheme developed by the ASI to assess and identify environmentally sustainable steelwork suppliers against industry best practice in steel processing.







ESC (Environmental Sustainability Charter)



ASI ENVIRONMENTAL SUSTAINABILITY CHARTER

What is the ESC?

- Developed in 2011 by ASI in conjunction with the Green Building Council of Australia (GBCA)
- Identifies and assesses environmentally sustainable steelwork suppliers against industry best practice in steel processing.
- It is designed for steelwork fabricators, steelwork processors and contractors to demonstrate the company's commitment to, and continual improvement in environmental management through their steel processing/fabrication operations.



ESC (Environmental Sustainability Charter)



ASI ENVIRONMENTAL SUSTAINABILITY CHARTER

What value does ESC membership bring for members?

- Demonstrates compliance to sustainability measures across entire supply chain
- Builds our members brand in the market providing a competitive advantage
- Provides assurance to customers that the steel supply chain is reducing its environmental impact
- Provides a clear identification of reduced carbon footprint across the steel value chain
- Utilising an ESC steel fabricator on a project provides one green star point to the builder -Procurement contracts are increasingly calling up Green Star ratings in procurement contracts
- Cost savings for members by implementing waste and energy and other environmental related initiatives
- Member benefits such as Life Cycle Analysis tool and Environmental Product Declaration (EPD) at reduced rates and access to a new online Environmental Management System (EMS)



Environmental Sustainability – Australian Steel Producers

Company	Strategy	Initiatives
BlueScope	Actively lowering emissions intensity and producing highly recyclable products • Integrated Route	 Net zero scope 1 and 2 operational greenhouse gas emissions by 2050, with medium term 2030 targets Solar farm PPA to supply 20% of Port Kembla electricity \$1 billion investment in expansion of low emission EAF steelmaking at North Star.
InfraBuild InfraBuild	 'Green Steel' – carbon neutral by 2030 EAF Route 	 Increasing resource and energy efficiencies and the use of sustainably generated energy Promotion of the recovery, reuse and recycling of steel Liberty Steel aims to be carbon neutral by 2030
Liberty Primary	'Green Steel' – carbon neutral by 2030Integrated Route	 Transformation of Whyalla Steelworks from integrated route to DRI / EAF route, initially using natural gas, then switching to hydrogen reduction. Liberty Steel aims to be carbon neutral by 2030
Molycop	Emphasis on circular economy and reducing carbon footprint • EAF Route	 Achieve reduction in Scope 1 and Scope 2 GHG emissions intensity via solar/wind PPA agreement. Customer by-product recycling projects including EAF polymer injection.





20 accredited ShedSafe Manufacturers

ShedSafe Accredited Manufacturers have successfully completed a third party review for engineering and design conducted by independent consulting engineers.

ShedSafe





ASI Synergies with AFI

- Significance to members of energy cost and availability
- Members are large contributors to national CO₂ emissions
- Absence of vocational training programs for semi-skilled workers, particularly those located in regional areas
- Members dealing with competition from dumped imported products
- Many similarities in the industry sectors served and therefore likely to be common market development and promotional opportunities
- Need to be aware of Economic Trends



THE AUSTRALIAN STEEL INSTITUTE'S POPULAR ECONOMIC BRIEFING RETURNS IN 2021 WITH SUPPORT FROM CORPORATE PARTNER, AUSTRALIANSUPER, THIS YEAR, THE BRIEFING WILL BE PRESENTED AS AN ONLINE WEBINAR, COMPLETE WITH A LIVE Q&A SESSION.

In the wake of the COVID-19 pandemic, the hit to the global economy in 2020 was severe. Not surprisingly, permanent effects are expected to hamper global economic growth for years. In the 2021 Economic Briefing, Economist Mark Tierney from AustralianSuper will explore these effects. Mark will discuss how these effects may actually be less important than the massive divergences that have emerged between sectors in many countries.

Ongoing restrictions on services sectors have been accompanied by a huge, early rebound in many goods sectors. Ultra-low interest rates and enormous fiscal stimulus have force-fed demand and production in global manufacturing, including steel. According to Mark, while vaccinations should improve the outlook for the services sectors global, persistently low interest rates and looming fiscal stimulus in the US will also provide orgoing support for global manufacturing.

Please note that this event is open to ASI Members and their guests only. ASI Members can register, and purchase tickets on behalf of non-member guests.



REGISTER NOW: https://www.steel.org.au/events-awards/events/

Opportunities for Cooperation and Collaboration between ASI and AFI

Australian Steel Institute

ASI and AFI signed a Memorandum of Understanding on 26 November 2021

Opportunities for Cooperation and Collaboration

- Advocacy to government
 - Proposed ban on exports of unprocessed scrap metal
 - Industry policy lobbying, particularly as regards energy cost & availability, and local participation in government funded projects
 - Support for careers in manufacturing



Opportunities for Cooperation and Collaboration between ASI and AFI

Advocacy Submissions to Government

Australian Steel Institute



February 2022

The Senate

Economics References Committee

The Australian manufacturing industry



AUSTRALIAN STEEL INSTITUTE

Senate Economics References Committee

Australian Senate Inquiry into the Future of the Australian Steel Industry

Submission by

AUSTRALIAN STEEL INSTITUTE (ASI)



ENSURING A SUSTAINABLE AUSTRALIAN STEEL INDUSTRY IN THE 2020s AND BEYOND



WHITE PAPER | OCTOBER 2020

www.steel.org.au 02 8748 0180 enquiries@steel.org.au AUSTRALIAN STEFI INSTITUTE



Capabilities of the Australian steel industry to supply major projects in Australia

compiled by the Australian Steel Institute

Version 2.4 - February 2022

(FEBRUARY 2016)

Opportunities for Cooperation and Collaboration between ASI and AFI

Australian Steel Institute

Advocacy



https://youtu.be/vRK6Lzm4zOo

Support Our Steel Industry video campaign metrics

Target set at start of campaign for a total of 15,000 views. Campaign commenced 29 July 2020.

Results have been:

- Facebook video reach: 157,750
- LinkedIn video views: 10,012





Thank you!

Email me: johng@steel.org.au

