

# Annual Report 2024

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The Mining Association  
of Canada  
L'association minière  
du Canada

# CONTENTS

THE MINING ASSOCIATION OF CANADA (MAC) ..... 3

MESSAGE FROM THE CHAIR AND THE PRESIDENT AND CEO ..... 4

COI PANEL 2024 ANNUAL STATEMENT..... 6

TAXATION COMMITTEE ..... 10

INTERNATIONAL TRADE AND INVESTMENT..... 13

ENVIRONMENT COMMITTEE..... 15

INDIGENOUS RELATIONS COMMITTEE..... 20

ENERGY AND CLIMATE CHANGE COMMITTEE..... 22

NORTHERN AFFAIRS COMMITTEE ..... 26

INTERNATIONAL SOCIAL RESPONSIBILITY (ISR) COMMITTEE ..... 30

MINING INDUSTRY HUMAN RESOURCES COUNCIL ..... 32

PUBLIC AFFAIRS COMMITTEE..... 36

SCIENCE COMMITTEE — ANNUAL REPORT ..... 39

TAILINGS WORKING GROUP — ANNUAL REPORT..... 43

TRANSPORTATION COMMITTEE ..... 45

REPORT FROM THE CHAIR OF THE TOWARDS SUSTAINABLE MINING (TSM)  
GOVERNANCE TEAM..... 47

BOARD OF DIRECTORS & COMMITTEE MEMBERS..... 50

## THE MINING ASSOCIATION OF CANADA (MAC)

The Mining Association of Canada (MAC) is the national organization for the Canadian mining industry. Its members account for the majority of Canada's production of base and precious metals, uranium, diamonds, metallurgical coal and mined oil sands, and are actively engaged in mineral exploration, mining, smelting, refining and semi-fabrication.

Representing members committed to sustainability, MAC's Towards Sustainable Mining® (TSM) initiative is an award winning and world-leading standard that fosters continuous performance improvement in environmental and social mining practices.

MAC promotes the interests of the industry nationally and internationally, works with governments on policies affecting minerals, informs the public, and promotes collaboration to solve common issues and foster progress. MAC works closely with provincial and territorial mining associations and other industries, as well as with environmental and community groups across Canada.

## MESSAGE FROM THE CHAIR AND THE PRESIDENT AND CEO

Carolyn Chisholm, Chair of the Board of Directors, and  
Pierre Gratton, President and CEO



Carolyn Chisholm,  
Chair: Board of Directors

2024 saw a seismic shift in global geopolitics - the election of US President Trump and a Republican Congress promises a tumultuous four years for many, including Canadian industries. Trade protectionism is rising globally and a Trump administration is expected to intensify this trend, sparing few. Minerals and metals, long exempt from tariffs, may no longer be so. Canada has itself initiated consultations on potential tariffs, trying to determine the extent to which Canada aligns fully (or in part) with the US, especially as it relates to China. MAC's response is one of caution — while recognizing geopolitical pressures, trade wars rarely end well. Attention to trade issues, and a reinvigorated MAC trade committee, will be needed in 2025 and beyond.

2024 also concluded with Canada's own political system headed for change, as the Liberal government entered its final year with low polling numbers. The Prime Minister resigned, prompting a leadership race. The result, for the latter half of 2024, was a paralyzed Parliament. But despite the political gridlock, MAC still had a successful year. In 2024, MAC was successful in persuading Finance of the need for two changes to tax policy; one to the eligibility threshold for critical mineral projects under the CTM-ITC to 50% from 90% (thus ensuring copper project are eligible as intended) and a change to the Alternative Minimum Tax to ensure the METC continues to attract investors (the budget's increase to the inclusion rate for capital gains to 66 % inadvertently undermined the Mineral Exploration Tax Credit). Finance published legislative proposals for both measures, and they announced in the Fall Economic Statement, but did not get implemented due to the collapse of the Liberal/NDP governance agreement. This issue will remain a priority when Parliament resumes in 2025.

MAC staff were also active on a slew of other issues, most notably the Nunavut Land Use Plan, reviews of different aspects of the Impact Assessment Act (project list, Indigenous co-administration agreements), the Fisheries Act, and follow-up consultations to the Canadian Environmental Protection Act review. MAC also continued to engage with Environment and Climate Change Canada on oil sands water return and coal effluent regulations, both of which advance painfully slowly.



Pierre Gratton,  
President and CEO

TSM continued to evolve with a major change to its governance model in the relationship between MAC's COI Panel and the MAC Board. For 20 years, the panel has served in an advisory capacity, although the MAC Board has consistently accepted and acted upon the panel's advice. Nonetheless, there are increasing expectations from customers, investors and others that standards be multi-stakeholder governed. Hence, the MAC Board has voted to change TSM such that, from now on, decisions related to TSM require the formal support and approval of both the MAC Board and the COI Panel. This innovative decision-making model has been well-received by customers and investors and strengthen TSM's acceptance as a leading standard.

Major progress was achieved on the Consolidated Standard since June, most notably a breakthrough on a governance model, which had proved challenging and elusive. After another two-day meeting with the two advisory groups, the partners were able to advance a draft Standard for public consultation after sign-off from each of the four partners' governance bodies. The public consultation on the standard lasted two months, until December 16th with nearly 5000 comments received and logged. MAC and the partners are also engaging in many fora and holding many webinars for industry and non-industry stakeholders. Meanwhile, TSM continues to advance, with its adoption by the Mongolian Mining Association in October. MAC also received confirmation in October that its application was accepted to be a Community Member of the ISEAL program.

MAC's achievements in 2024 were due to the collective efforts of many people. These individuals include our Board of Directors, Executive Committee and TSM Governance Team, and the committed industry experts who give their time and lend their expertise to MAC committees, task forces and working groups. We also boast one of the strongest association staffs in Ottawa; individuals who are recognized for their expertise and professionalism by government and other associations. With their mix of skills and experience, they deliver tangible outcomes that benefit the entire industry. Their work is much appreciated by the Board and members of MAC.

For more details on the topics discussed here, and on other aspects of MAC's work, we encourage you to read the Annual Report in full.

# COI PANEL 2024 ANNUAL STATEMENT

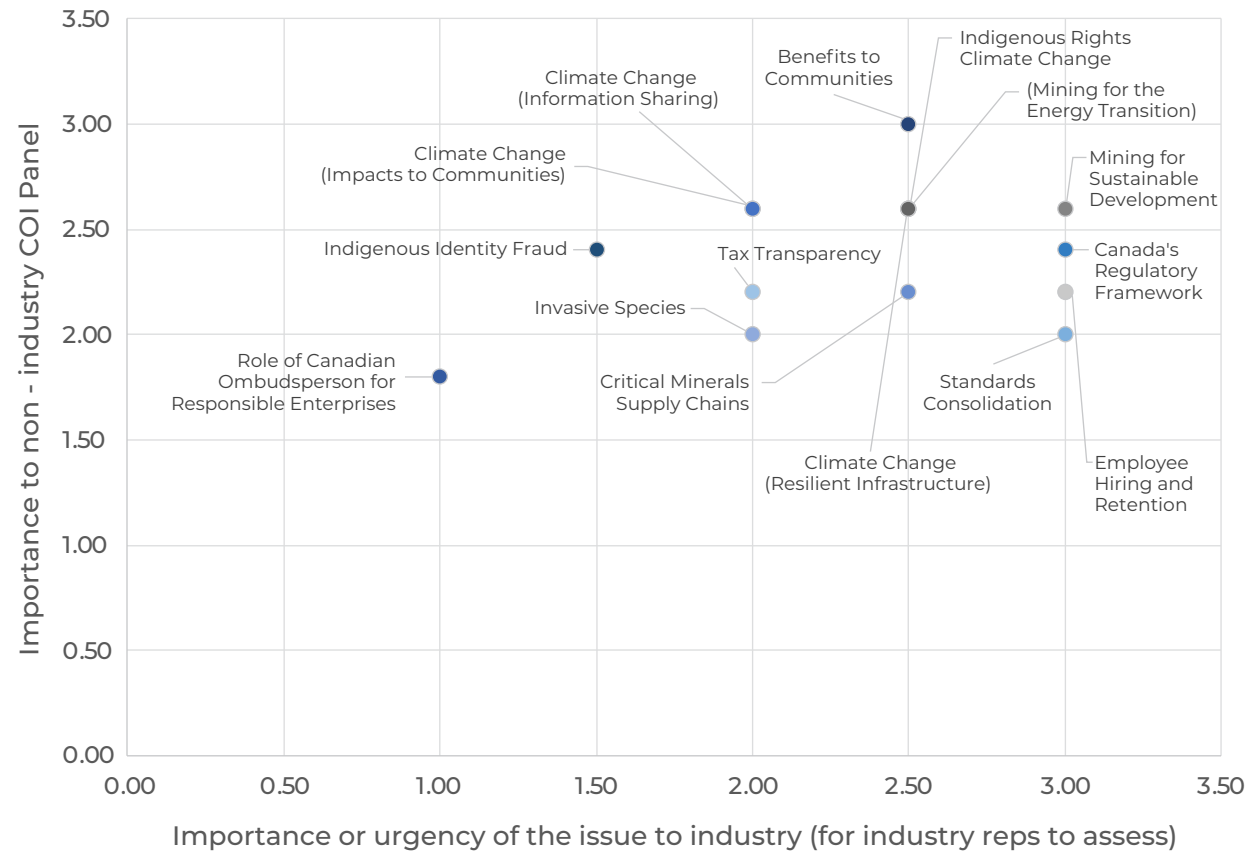
## The Communities of Interest Panel for Towards Sustainable Mining

Established in 2004, the Communities of Interest (COI) panel provides governance and oversight to MAC's Towards Sustainable Mining (TSM) reporting standard. Eighteen individuals representing Indigenous People, environmental and civil society organizations, economic and community development, finance and investment, labour, law, international development, and industry meet twice a year as a full group and numerous times throughout the year in smaller working groups. The COI is a place for dialogue on issues of concern and emerging interest to the mining sector and its communities of interest.

## A Year in Review

In 2024, Towards Sustainable Mining celebrated its 20<sup>th</sup> anniversary. Over the years, the Communities of Interest Panel (COI) has played an integral role in prompting discussion on critical issues in the mining sector and providing oversight into efforts to advance responsible mining globally. During 2024, the COI prioritized climate change, Indigenous identity and rights, community benefits, regulatory oversight, tax transparency, critical minerals and employee retention and attraction as key issues.

COI Panel Materiality Matrix – Issues of Importance



There were two governance developments of significance to the COI in 2024. One was an amendment to the [TSM COI panel terms of reference](#) to formalize the role of the panel as a decision-making body, working in parallel to the Mining Association of Canada's Board of Directors. The second was the addition of a new seat on the COI. As interest in responsible sourcing continues to grow, the COI recognized the value of having a downstream user on the COI and welcomed two new members representing customers of mined materials.

As part of its annual work, the COI met twice, conducted two post-[verification reviews](#), evaluated applications for TSM awards, and contributed expertise to the [Consolidated Mining Standard Initiative](#). The CSMI is an effort to improve transparency and comparability for those tracking ESG performance and to reduce the reporting burden for company personnel tasked with that responsibility.

In 2024, TSM and The Copper Mark participated in a pilot project to undertake a joint verification process of both standards on a number of sites. The project included a verifier meeting directly with communities of interest and company employees as part of their on-site verification process. The COI heard feedback from one of the participating communities of interest and looks to incorporate the findings into future improvements to the TSM process.

Each year the COI goes through a renewal process and at the close of 2024 panel members said farewell and thank-you to colleagues representing environment (Graeme Reed) and economic development (Daniel McNeely) and welcomed their replacements Lisa McLaughlin and Devin Naveau. The panel was also joined this year by Sarah McLean (De Beers) and Carol Plummer (Agnico Eagle) to fill a seat left by Alice Wong (Cameco) to whom we extend our warmest wishes for a happy retirement. As noted, two new seats were added to the COI in 2024 to provide a voice for customers of mined materials and the panel welcomed Kai Ammann (BMW) and Sarah Wirtz (Mercedes-Benz).

### **Addressing Downstream Interest in Responsible Mining**

The impact of mining extends far beyond the extraction phase, and it is essential to incorporate the interests and concerns of downstream sectors to achieve comprehensive responsible mining practices. Addressing downstream interests is critical for ensuring sustainability and long-term value across the entire supply chain.

A key reason for addressing downstream interests is to ensure transparency and traceability throughout the supply chain. With increasing consumer and regulatory pressure for responsible sourcing, industries that rely on raw materials must be able to trace the origin of their minerals and materials. The integration of downstream stakeholders—such as manufacturers and product developers—to responsible mining practices ensures that materials are sourced ethically and in compliance with environmental and social standards.

### ***Meeting Consumer and Regulatory Expectations***

With growing consumer demand for sustainable products and increasing regulatory pressure, industries that rely on mined materials must ensure their supply chains adhere to stringent social and environmental standards. Responsible mining standards play a critical role in helping downstream industries meet these expectations by ensuring that the materials they use are ethically sourced and traceable.

### ***Promoting Environmental Sustainability***

By taking an active role in responsible sourcing, downstream companies are taking actions to mitigate environmental impacts associated with mineral extraction. This includes promoting the adoption of cleaner, more energy-efficient mining techniques, reducing waste, and minimizing water and land degradation during the mining and refining processes.

Addressing downstream interests in responsible mining standards is essential for creating a comprehensive, sustainable, and ethical supply chain. By ensuring transparency, promoting environmental sustainability, mitigating supply chain risks, and aligning with consumer expectations, responsible mining practices benefit all industries that depend on mined materials. This integrated approach aims at fostering collaboration and reducing risks, while trying to minimize negative environmental, social, and economic impacts. Ultimately, by involving downstream stakeholders, responsible mining becomes a shared responsibility, contributing to a more sustainable and resilient value chain.

### ***Indigenous Identity and the Mining Sector***

In recent years, Indigenous identity fraud has become a significant and complex issue in Canada, raising concerns about the authenticity of claims to being Indigenous and the impact on Indigenous rights and communities. Indigenous identity fraud occurs when non-Indigenous individuals falsely claim to be Indigenous, either intentionally or unintentionally. Individuals may falsely self-identify as Indigenous for a sense of belonging or for personal gain, such as to gain access to economic resources, research funding, employment opportunities, honorary positions, awards, or other benefits intended for Indigenous Peoples and their citizens.

During the fall 2024 meeting, Indigenous Panel members provided an overview of the topic to provide COI members with a greater understanding of this important issue and the effects on the mining industry and Indigenous communities. Key points are summarized below.

1. **Indigenous rights and identity:** Indigenous Peoples and their communities hold specific communal rights, which are defined locally and internationally. To avoid confusion about which individuals are entitled to these rights, it is important to start with a common understanding and definitions of the terminology related to Indigenous identity (i.e., Métis, First Nation, and Inuit). Indigenous identity is not just about genealogical connection or self-identification, identity is deeply linked with belonging and connection to a community.



2. **Calls to Action for government and society:** The Truth and Reconciliation Commission 94 Calls to Action for government and society outline specific economic and employment benefits for Indigenous Peoples via their citizens (e.g., procurement, hiring priorities) to reconcile historic wrongs inflicted on Indigenous collectivities.
3. **Benefits to communities:** Mining companies are required to engage with and provide benefits to Indigenous communities and normally rely on regulators to identify project-affected Indigenous rights-bearing communities. While companies are hesitant to ask for proof of community affiliation and lean towards inclusivity, this hesitancy can be rectified by working with Indigenous partners to create processes for vetting Indigenous identity claims in hiring and contracting processes.

### **Closing: Change and a Commitment to Continuous Improvement**

As COI panel members reflect upon the past year, the committee is proud of the work done to strengthen the governance of the COI and formalize the important role this group plays in supporting Towards Sustainable Mining. For 2025, panel members commit to continuing to evolve the agenda of the COI to incorporate contemporary issues in the relationship between mining and society and to raise concerns, challenge assumptions, and champion change.

A number of topics discussed in 2024 will continue to remain important: Indigenous rights and reconciliation; Canada's role in providing the metals, minerals and materials needed for the transition to a green future; ensuring Canada has a mining sector that is transparent, responsible, and inclusive and that acts as a catalyst for the sustainable development of resource-rich regions in Canada and around the world.

As members of the COI, we look forward to our ongoing work.

## TAXATION COMMITTEE

Past Chair: Jocelin Paradis, Vice President, Tax, Rio Tinto Canada (retired mid-2024)

Current Chair: Johanne Brouillard, General Manager of Canada and South America Tax, Rio Tinto

Vice Chair: Leandro Reis, Canadian Mining & Metals Tax Leader, Deloitte

*The Taxation Committee monitors finance-related issues of national importance, advocates for tax changes to enhance industry competitiveness, and serves as a useful network for members to exchange information on tax and fiscal issues.*

### Federal Fiscal Policy Engagement

Throughout 2024, MAC worked closely with the Taxation Committee to engage with the federal government, advocating for sound and competitive fiscal and tax policies, and emphasizing the importance of a supportive fiscal environment to maintain Canada's competitiveness for new mineral investment. Most of the Committee's collaboration and external engagement took place in advance of the Government of Canada's 2024 Federal Budget and the 2024 Fall Economic Statement, through MAC's budget submissions and participation in consultations on advancing key Budget 2023 and 2024 priorities. This work focused primarily on concerns related to the eligibility of the Clean Technology Manufacturing Investment Tax Credit (CTM-ITC) for investments in property for qualifying critical minerals. It also addressed Budget 2024's adjustment to the capital gains inclusion rate and Budget 2023's changes to the Alternative Minimum Tax (AMT), both of which significantly reduce the incentive to invest in flow-through shares.

**Submission to the Government of Canada's Consultation on the Draft Legislation for the Clean Technology Manufacturing Investment Tax Credit:** MAC convened a meeting with MAC members of the Taxation Committee, the Minister's Office, and senior officials from the Department of Finance to discuss the implementation of the CTM-ITC. The discussion focused on the challenges facing Canadian critical mineral production, particularly the decline in reserves and base metal output.

MAC emphasized the need for upstream investments to ensure a stable supply of minerals and metals for the downstream electric vehicle and battery manufacturing base, and to support Canada's allies. Concerns were raised about the narrow definition of eligible expenses, which may hinder new investments. MAC recommended broadening the scope to include mine development-related expenditures. The meeting also addressed the CTM-ITC eligibility threshold for copper production, recommending alignment with the Critical Minerals Exploration Tax Credit (50% threshold) and underscoring the importance of setting a threshold that incentivizes increased copper production in Canada.

In collaboration with the Taxation Committee MAC prepared and submitted comments and recommendations as part of the public consultation process on the CTM-ITC draft legislation, formally outlining the concerns raised with the Department of Finance.

**Budget 2024 Submission:** MAC engaged the Taxation Committee to develop a submission for the Government of Canada's pre-Budget 2024 consultation process. The submission focused on advancing initiatives to implement the Critical Minerals Strategy and on the timely and appropriate allocation of funding from Budgets 2022 and 2023 to enhance Canada's position as a preferred destination for battery material manufacturing. The submission included thematic recommendations to support the following priorities:

- Mines to Mobility: Establish Canada as a global hub for electric vehicle material production
- Improved Predictability and Timeliness in Permitting: Streamline approvals for future mines and material manufacturing facilities
- Strengthening Indigenous Participation in Mining
- Incentivizing Private Sector Contributions to Nature Conservation
- Renewed and Stable Employment and Social Development Canada (ESDC) Funding for the Mining Industry Human Resources (MiHR) Council

**Budget 2024:** On April 16, the government announced measures in Budget 2024 that impacted Canada's mining and mineral exploration sector, building upon commitments from Budget 2023, the 2023 Fall Economic Statement, and the Canadian Critical Minerals Strategy. Highlights from the Budget included:

- The extension of the Clean Technology Manufacturing Investment Tax Credit (CTM-ITC) to cover investments in property primarily used (50 per cent or more of the production value) for qualifying critical minerals, addressing concerns raised by MAC.
- A target of five years or less to complete federal Impact Assessment and permitting processes, and two years or less for permitting of non-federally designated projects. In addition, the government set a three-year target for nuclear project reviews and committed to working with the Canadian Nuclear Safety Commission and the Impact Assessment Agency of Canada to streamline processes and reduce duplication between the two agencies.
- \$5 billion in loan guarantees to support Indigenous communities' economic development.
- \$207.6 million for the Student Work Placement Program to create additional work-integrated learning opportunities.

The government confirmed the extension of the Mineral Exploration Tax Credit (METC) to March 31, 2025. However, the budget's increase to the inclusion rate for capital gains for corporations, trusts, and individuals had implications for mineral exploration financing. MAC worked closely with the Taxation Committee and colleagues in the exploration sector, including Associate Members WCPD and PearTree, as well as with Finance Canada, to raise concerns about these changes. MAC also strongly advocated with various government departments, including ISED, PCO, NRCan, and CANNOR, regarding the broader impacts of these changes on the exploration sector. While it appeared unlikely that the government would reverse the increase to the capital gains inclusion rate, alternative options to mitigate the impact were presented to the Department of Finance. MAC also demonstrated the potential consequences for the sector should no action be taken.

**Fall Economic Statement:** On December 16, 2024, the Fall Economic Statement 2024 (FES 2024) introduced targeted tax and legislative changes that could significantly impact the minerals and metals sector, including the expansion of the Clean Technology Manufacturing Investment Tax Credit (CTM-ITC), adjustments to the Alternative Minimum Tax (AMT), and the launch of the Indigenous Loan Guarantee Program. While the statement did not provide significant new funding, it reaffirmed the sector's role as a pillar of Canada's economic strategy, with regulatory reforms and investment incentives aimed at advancing economic, geopolitical, and net-zero objectives. Additionally, broader permitting reforms aim to accelerate project approvals and enhance investment certainty.

**Key Highlights from FES 2024:**

1. Clean Technology Manufacturing Investment Tax Credit (CTM-ITC) Expansion
  - A legislative fix expands eligibility for polymetallic extraction and processing, addressing industry concerns.
2. Alternative Minimum Tax (AMT) Adjustments
  - Preserves the Mineral Exploration Tax Credit (METC) by preventing its erosion due to the increased capital gains inclusion rate.
3. Reinstatement of the Accelerated Investment Incentive
  - Fully reinstates accelerated capital cost allowances for mining equipment and clean energy assets (2025–2030).
4. Indigenous Loan Guarantee Program
  - Introduces \$5 billion in loan guarantees to support Indigenous investment in mining and resource projects.
5. Permitting Reform – “One Project, One Review”
  - Streamlines federal project reviews, reducing regulatory burdens for mining and infrastructure development.
6. Trade and Economic Outlook
  - Highlights risks from U.S. tariffs and global economic uncertainties, underscoring the need for ongoing industry engagement.

**Note:** The prorogation of Parliament, combined with the Liberal Party leadership race and the uncertainty that was surrounding a potential election call, placed the FES bill and its commitments at risk. As the bill had not been tabled in the House of Commons, its implementation remained uncertain. Key industry measures, including tax incentives and regulatory reforms, face delays or revisions, impacting investment confidence and policy certainty for the mining sector. Continued engagement by MAC in collaboration with the Taxation Committee with policymakers continued to be essential to ensure the sector's priorities remain on the legislative agenda.

## INTERNATIONAL TRADE AND INVESTMENT

*MAC monitors and participates in government trade activities and works to promote open flows of trade and investment to enhance the international competitiveness of the Canadian minerals and metals industry.*

Canada's mining sector is a global leader. Its presence in more than 90 countries raises living standards and reduces poverty. Canada boasts the industry's best exploration firms and a capital market that is home to more than half of the world's publicly traded mining companies. Canada's international mining leadership, powered by innovative and dynamic approaches, boosts our strong reputation for sustainable mining and responsible business conduct, and creates new opportunities to increase investment, particularly in the critical minerals space, and enhances market access for Canadian products, goods and services.

The minerals and metals sector is a significant driver of the Canadian economy, contributing 4% (or \$117 billion) to the national GDP in 2023. The sector directly employs 430,000 people and an additional 274,000 indirectly—representing one in 30 employees in the Canadian labour force—while supporting one of the largest supply sectors in the world. It is also a top employer of Indigenous peoples, providing jobs to more than 12,000 individuals in 2023. Mining and associated activities, both domestic and international, generate and support these Canadian economic benefits. For example, mineral exports accounted for 21% (over \$153 billion) of Canada's total exports in 2022. The bulk of Canada's exports, 57% in 2022, were to the United States – our single largest export market by a wide margin. The United Kingdom (9.2%), the European Union (7.8%) and China (7%) were also significant export destinations.

Canadian mining assets (CMAs) reveal important insights into the breadth and depth of the global presence of Canadian mining and mineral exploration companies. A total of 1,396 Canadian mining and exploration companies had CMAs valued at \$336.7 billion in 2023, a 6.9% increase from \$315.0 billion in 2022. Of these companies, 761 had CMAs located abroad worth \$220.4 billion, which was up 5.0% from the 2022 value of \$209.8 billion. In 2023, Canadian companies were present in 95 foreign countries and mining assets abroad accounted for about two thirds of the total value of CMAs.

Much of the investment supporting the sector is raised on the open market and transacted in Canada. As the global centre for mining finance, the Toronto Stock Exchange (TSX) and TSX Venture Exchange (TSX-V) list 40% of the world's publicly traded mining companies. Together, these exchanges accounted for more mining equity capital raised (\$45 billion, or 36% of the total worldwide) than any other exchange. At the end of 2023, 1,119 mining companies were listed on the TSX and TSX-V, with a combined market value of \$517 billion, having raised \$7.6 billion in equity.

### **Advancing Canada's Mining Sector: Free Trade and Market Access**

Free trade, investment, and taxation agreements are critical to facilitating the trade of mining products and the flow of investment. These agreements reduce barriers, enhance transparency, and encourage cooperation, enabling companies to compete more effectively in global markets. The reduction or elimination of tariffs increases the competitiveness of Canadian mineral products by leveling the cost playing field and allowing companies to capture a larger share of international markets.

Investment agreements—particularly those that include dispute resolution mechanisms—provide mining investors with greater certainty when operating in foreign jurisdictions. In addition, provisions related to labour mobility and regulatory cooperation help companies access the specialized skills required for project development and operations, while supporting constructive engagement throughout complex regulatory approval processes.

Canada's continued leadership in the global mining sector depends on access to modern, comprehensive trade and investment agreements that reflect the evolving dynamics of international markets. These agreements are essential for the sector to remain competitive in a rapidly changing global environment.

The strength of Canada's mining industry is also reflected in its trade relationships, where minerals and metals are central to many international trade flows. These flows are supported by strategic trade agreements that position Canadian products competitively in the global marketplace.

Canada's success in mining is also shaped by the federal government's broader trade efforts, including the global network of embassies and trade commissioners, trade finance capacity through Export Development Canada, and a suite of Free Trade Agreements and Foreign Investment Promotion and Protection Agreements (FIPAs).

#### **Trade Working Group Activities in 2024**

In light of heightened geopolitical tensions, emerging trade disputes, and growing trends toward national protectionism, MAC established a Trade Working Group in late 2021 to focus on trade-related issues. This initiative followed an initial survey of MAC members regarding the association's trade engagement and their respective trade priorities. Members expressed that MAC could play a more active role in helping to understand how trade negotiations and irritants directly impact mining companies and the broader Canadian economy.

MAC's Trade Working Group has experienced a significant increase in trade-related activity, including consultations, meetings, and engagement with the Government of Canada. The group has expanded its membership and is now more representative of MAC's broader membership base. Given the ongoing trade tensions with the United States, the Working Group is expected to remain highly active, and MAC continues to be deeply engaged in these efforts.

In 2024, MAC worked with the Trade Working Group to submit briefs in response to Government of Canada consultations on the following issues:

1. Potential new measures to advance and defend Canada's economic security interests.
2. Potential surtaxes in response to unfair Chinese trade practices in critical manufacturing sectors.
3. The operation of the Canada–United States–Mexico Agreement (CUSMA).

## ENVIRONMENT COMMITTEE

Chair: Allison Merla, Advisor — Environment, Vale

*The Environment Committee addresses general environmental issues and legislation affecting the industry.*

In 2024, the Environment Committee met in person in May and in September, while continuing monthly virtual meetings that alternated between staff updates and presentations by invited speakers. The meetings were held jointly with the MAC Science Committee. Committee work was augmented by task forces. The MAC Reviews Task Force focused its efforts on the implementation of the *Fisheries Act*, the *Impact Assessment Act* and the *Canadian Navigable Waters Act*. The MAC Biodiversity Task Force was active on developments related to the *Species at Risk Act*, the *Migratory Birds Convention Act* and the Kunming-Montreal Global Biodiversity Framework (GBF).

The Committee continued its work related to air pollution, the Chemicals Management Plan, Federal Environmental Quality Guidelines, the National Pollutant Release Inventory, and implementation of the modernized *Canadian Environmental Protection Act* (CEPA). The Committee engaged with officials from Environment and Climate Change Canada (ECCC), Health Canada, Fisheries and Oceans Canada, the Impact Assessment Agency, the Privy Council Office (PCO), Transport Canada and Natural Resources Canada.

### **Impact Assessment Act (IAA)**

The mining sector is heavily impacted by federal assessment legislation. Despite being provincially regulated, mining projects continue to be the dominant sector undergoing federal impact assessment.

MAC continues to advocate for effective and efficient federal impact assessment through significantly improved coordination with provinces and an approach that focuses on issues related to effects in federal jurisdiction that are material to decision-making.

Throughout 2024, the MAC Reviews Task Force monitored the federal government's response to the Supreme Court of Canada's (SCC) opinion on the constitutionality of the IAA. As part of the *Budget Implementation Act, 2024*, the federal government introduced amendments to the IAA that were intended to bring the legislation in line with the guidance from the SCC. MAC appeared before the Senate Standing Committee on Environment as part of its study of the amendments in May 2024. MAC's testimony emphasized the mining sector's experience with the IAA and called for systemic implementation changes to ensure that assessments are appropriately focused on effects in federal jurisdiction. The amended Act came into force in June 2024.

In 2024, the Impact Assessment Agency initiated the five-year review of the *Physical Activities Regulations* (Project List). To inform this review and potential amendments to the Project List, MAC provided detailed comments to the Agency calling for the regulations to be re-calibrated to ensure that the Project List captures only those projects that are expected to have material adverse effects in federal jurisdiction, as stated as an objective of the five-year review. Specifically, MAC recommended that the Project List be amended to significantly raise production thresholds for new mines/mills and

exclude specific projects, such as those on brownfield sites, mines with fully electric underground facilities, and mine and mill expansions.

MAC also provided the Agency with comments in response to the public consultation on the development of Indigenous Co-Administration Regulations, emphasizing importance of ensuring that the regulations be developed in a manner that supports clear and predictable assessment processes.

MAC has worked with consecutive governments and officials on federal major project assessment legislation and regulations since 1993 and will continue to work towards achieving an effective framework going forward.

### ***Fisheries Act***

Throughout 2024, MAC continued to engage with Fisheries and Oceans Canada (DFO) on implementation of the *Fisheries Act*, 2019. While some implementation progress was made in 2023 in response to MAC's intervention with Deputy Ministers, no new Codes of Practice or Standards for routine activities were published in 2024. The department largely continued to rely on site-specific reviews for most works, undertakings, and activities near water, even though many have little or no impact on fish habitat. MAC therefore continued to advocate for the development of compliance tools to support the implementation of the Act and to ensure the availability of adequate resources for complex projects that may impact fish and fish habitat. These efforts were supported by continued MAC leadership of the *Fisheries Act* industry network. As a result, DFO has indicated that additional Codes of Practice will be released for comment in 2025.

Of note, Section 92 of the *Fisheries Act* requires the Act to be reviewed by the Committee of the Senate, of the House of Commons, or of both Houses every five years. In the latter half of 2024, MAC conducted pre-engagement on this expected review with key officials within DFO and members of the House of Commons Standing Committee on Fisheries and Oceans (FOPO). FOPO launched their review of the Act in late September, followed by a series of witness meetings in November and December. MAC submitted an individual brief and led a multi-association brief to the Committee before appearing on November 25, 2024 to speak to the need for improved implementation, more compliance tools, and culture change. FOPO's study was abruptly terminated without a report or significant outcome through the prorogation of the first session of the 44<sup>th</sup> Parliament.

### ***Canadian Navigable Waters Act (CNWA)***

In 2024, MAC engaged in the five-year review of the provisions and operation of the Act, as required by the CNWA. MAC's input into the review called for a pragmatic approach to determining what is navigable water, an amendment to make extinguishment Orders Ministerial rather than Governor in Council for unscheduled navigable waters, and better guidance and training on Indigenous consultation for regional officials. MAC also continues to call for cross-departmental coordination of information gathering and Indigenous consultation when more than one federal process applies.



### **Explosives Act**

Throughout 2024, MAC engaged with the Explosives Regulatory Division within Natural Resources Canada (NRCan) on amendments to the *Explosives Regulations* under the federal *Explosives Act*. Throughout this process, MAC advocated for NRCan to coordinate with provinces and territories, given their expertise in underground operations; adopt a risk-based approach to its regulatory review; and ensure that any amendments reflect current safety risks, acknowledging the significant safety improvements made over the past three decades.

### **Canadian Environment Protection Act (CEPA)**

Implementation of the 2023 amendments to the *Canadian Environmental Protection Act, 1999* (CEPA) began in 2024. In 2023, the MAC Environment Committee identified which policies, plans, and regulations required engagement or monitoring in 2023, and task forces of interested members were formed to support MAC engagement.

A priority area for MAC was the implementation framework for the Right to a Healthy Environment (RTHE). ECCC and Health Canada consulted on a RTHE Discussion Document and held multi-stakeholder engagement sessions in early 2024, followed by consultation on a draft RTHE implementation framework in late 2024. The draft framework largely built on existing work under CEPA and incorporated MAC's comments on the Discussion Document, leaving MAC members optimistic that the framework will not be overly onerous. MAC also engaged in the following medium- to low-priority CEPA implementation consultations:

- Proposed Plan of Chemicals Management Priorities
- Science Approach Document for the Chemical Screening and Prioritization: Health Canada's Automated Workflow for Prioritization (HAWPr).
- Draft Strategy to Replace, Reduce or Refine Vertebrate Animal Testing under the *Canadian Environmental Protection Act, 1999* (CEPA)
- Proposed Watch List Approach

MAC continued to participate in cross-industry discussion and multi-stakeholder consultation on various themes that are being considered following CEPA review and as part of planning for future evolution of the Chemicals Management Plan. This included preparation for the next high priority consultation, expected in 2025 – the *Regulations respecting toxic substances of highest risk* – which will set out criteria for which substances are to be targeted for more aggressive risk management, including prohibition of production, use or release being the default.

Additionally, significant information gathering requirements under CEPA emerged in 2024, including:

- The Federal Plastics Registry, which will require companies importing plastics into Canada to report as “producers” starting in 2025 and reporting on all plastic waste generated at industrial, institutional, and commercial facilities starting in 2026.
- A mandatory s.71 information gathering notice on 312 per- and polyfluoroalkyl substances (PFAS).
- New reporting requirements for PFAS under the National Pollutant Release Inventory (NPRI).

Key focus areas for MAC in response to these onerous initiatives included advocating for practical and manageable requirements that are linked to specific policy questions/outcomes, fair and flexible timelines to complete the information requests, development of thorough guidance material to ensure that high quality data is collected, and support in determining what “reasonable efforts” to obtain information from suppliers looks like.

### **Air Quality**

One of the key elements of the Air Quality Management System (AQMS) is the Canadian Ambient Air Quality Standards (CAAQS) for selected air pollutants, which are developed through the CAAQS Development and Review Working Group (CDRWG). A priority item for the CDRWG in 2024 included a review of the 24-hour and annual CAAQs for Fine Particulate Matter (PM<sub>2.5</sub>), to be applied in 2030. In collaboration with the CDRWG mining representative and MAC members, MAC was able to provide input and support the final recommendations of the CDRWG, while recognizing mining-specific considerations and provincial responsibilities.

### **Species at Risk Act (SARA)**

Throughout 2024, MAC’s Biodiversity Task Force remained active and engaged on issues related to species at risk, including monitoring proposed amendments to Schedule 1 of SARA, the publication of proposed recovery planning documents and the implementation of SARA Section 11 Conservation Agreements. MAC’s advocacy has focused on encouraging a more effective and cooperative approach for species at risk. MAC continues to support the use of the SARA Section 11 Conservation Agreements as a tool to recover species at risk and encourage federal-provincial/territorial coordination.

In 2024, Environment and Climate Change Canada launched a consultation for an emergency Order under section 80 of SARA that would apply to three boreal caribou ranges in Quebec (Val-d’Or, Charlevoix, and Pipmuacan caribou ranges). Despite the significant mining presence in the Val-d’Or range, the Imminent Threat Assessment published by Environment and Climate Change Canada did not determine that mining is a primary threat to caribou. Mining in Val-d’Or and the surrounding areas are responsible for approximately 2% of disturbance in the range. In Charlevoix and Pipmuacan, mining represents less than 1% of disturbance. MAC engaged in the consultation process, providing information about the mining sector in this area and the potential implications of an Order on existing and proposed mining activities.

### **National Biodiversity Strategy**

In December 2022, the Kunming-Montreal Global Biodiversity (GBF) Framework was finalized at COP15 in Montreal. The GBF outlines a number of ambitious global goals and targets for biodiversity. In July 2024, the federal government released its national strategy in response to the GBF. In the lead-up to the release of the strategy, MAC provided Environment and Climate Change Canada with detailed comments calling for stronger federal-provincial/territorial coordination to support an effective strategy.

### **Migratory Birds**

MAC’s Biodiversity Task Force continues to monitor developments related to the *Migratory Bird Convention Act* and the *Migratory Bird Regulations* (MBR). In 2024, MAC met with Environment and Climate Change Canada to discuss early learnings from the first few years of the implementation of the modernized MBR.

### **Canada Water Agency**

In October 2024, the Canada Water Agency (CWA) was officially launched as a standalone agency under the portfolio of the Minister of Environment and Climate Change. Its mandate is to improve freshwater management in Canada by providing leadership, effective collaboration federally, and improved coordination and collaboration with provinces, territories, and Indigenous peoples to address transboundary freshwater challenges and opportunities.

Key priorities of the agency include the Review of the *Canada Water Act* and the development of a National Freshwater Data Strategy. Work on the Data Strategy progressed in 2024, including through consultation on a Framework for the Development of a National Freshwater Data Strategy. MAC provided comments on the document, outlining the extensive data generated under existing programs (e.g., MDMER) and through community partnerships and the key role industry plays in data management and quality assurance. A Discussion Document on the Review of the *Canada Water Act* is expected in 2025.

### **Closure**

In September 2024, MAC, in partnership with Rio Tinto, organized a half-day closure-focused workshop on the margin of the fall Environment and Science Committee meeting. The workshop highlighted key learnings from closure planning at Rio Tinto's Diavik mine as well as Saskatchewan's Institutional Control Program (ICP), including direct experience with the program from Orano.

As a result of this workshop, a follow-up meeting with a sub-group of interested members was held to explore opportunities for member collaboration on issues related to mine closure. During this meeting, participants agreed that a Closure Task Force, under the umbrella of the MAC Environment and Science Committee, should be established as a community of practice to facilitate dialogue and sharing on key Closure-related issues among members.

### **Advisory Committees**

MAC staff and representatives from member companies participate in several advisory bodies related to the work outlined above. In some cases, they serve in an individual capacity rather than as official MAC representatives.

- Minister's Advisory Council on Impact Assessment
- Nature Advisory Committee
- Canadian Domestic Environmental Advisory Group on the Canada-EU Comprehensive and Economic Trade Agreement
- National Boreal Caribou Knowledge Consortium
- Conservation Exchange Working Group
- National Pollutant Release Inventory Work Group
- Environmental Emergencies Regulations Advisory Working Group
- Standards Council of Canada Mirror Committee for ISO/TC 331 (Biodiversity)

## INDIGENOUS RELATIONS COMMITTEE

Chair: Krista Maydew, Vice President, External Affairs, IAMGOLD

*The Indigenous Relations Committee works to identify, evaluate and offer informed advice to the MAC Board of Directors on strategies to foster and strengthen relationships between Indigenous peoples and the mining industry in Canada.*

In 2024, the Indigenous Relations Committee met in person in June and also held several virtual meetings throughout the year. The committee focused on a range of issues related to Indigenous participation in the mining sector.

### **United Nations Declaration on the Rights of Indigenous Peoples Act**

In 2021, the federal *United Nations Declaration on the Rights of Indigenous Peoples Act* (UNDA) came into force. One of the key obligations in the Act is for the federal government to develop a federal UNDA Action Plan in collaboration with Indigenous peoples. The completed Action Plan was released in June 2023. The committee continues to monitor the implementation of the Action Plan and engaged throughout the year with Natural Resources Canada on the action plan measures that intersect with mining development, specifically actions that relate to free, prior and informed consent and benefits sharing.

In 2024, the committee also met with Crown-Indigenous Relations and Northern Affairs Canada for a briefing on implementation of action plan measure #68 which relates to strengthening Indigenous peoples participation in decision-making through the development of consultation agreements, co-developing information on Aboriginal and treaty rights, and the establishment of a permanent Indigenous advisory body.

MAC will continue to welcome opportunities to participate in the ongoing implementation of the Action Plan as well as other aspects of the UNDA. The mining sector has an important role in reconciliation and is positioned to meaningfully contribute to discussions related to economic development and regulatory consultation processes. MAC also has a strong track record of constructive collaboration with decision-makers, Indigenous organizations and non-governmental organizations in advancing public policy.

### **National Benefits Sharing Framework**

The Indigenous Relations Committee continues to follow developments related to the federal government's commitment to establish a National Benefits Sharing Framework to ensure that Indigenous peoples benefit from natural resource development in their territories. In 2024, the flagship component of the framework was launched with the establishment of the Indigenous Loan Guarantee Program. MAC continues to advocate for a flexible approach to administering the loan guarantee that supports interested Indigenous communities taking advantage of the broad investment opportunities in the mining sector, beyond direct ownership of a mine.

### **Committee Engagement**

The Indigenous Relations Committee is an ongoing and open forum for MAC members to share best practices related to Indigenous participation in mining. In 2023, the committee exchanged information and lessons learned on a variety of issues and topics, including:

- Implementation of the *TSM Indigenous and Community Relationships Protocol*
- Indigenous participation in mining
- Advancing reconciliation
- Honouring National Indigenous Peoples Day and the National Day for Truth and Reconciliation
- Indigenous awareness and inclusion
- Regulatory consultation processes
- Good practices in benefits sharing
- Community well-being and mining

Through annual donations, MAC continues to support Indspire, an Indigenous-led charity that is improving educational opportunities for First Nations, Inuit and Métis students through various initiatives.

## ENERGY AND CLIMATE CHANGE COMMITTEE

Chair: Kristin Bruce-Welsch, Manager, Climate Change – Safety, Health, Environment and Quality & Regulatory Relations, Cameco Corporation

*The Energy and Climate Change Committee promotes overall emissions performance and energy management.*

The Energy and Climate Change committee had a busy year in 2024, with multiple consultations on a range of climate change policies, mechanisms, regulations and legislation.

### Clean Electricity Standard (CER)

Throughout 2024, MAC engaged with the Energy and Climate Change Committee on the Clean Electricity Regulations (CER), which are central to Canada's transition to a net-zero electricity grid. MAC made several submissions and collaborated with Electricity Canada to advocate for sector-specific needs, highlighting the importance of practical, flexible, and affordable regulations.

MAC's advocacy focused on the following key priorities:

1. *Electricity Affordability:* As energy costs remain the third-largest operating expense for mining operations in Canada, MAC emphasized the need for cost-competitive, clean electricity to sustain competitiveness and attract long-term private sector investment necessary to meet national climate goals.
2. *Technological Viability:* MAC urged greater federal ambition and support to accelerate the commercialization of non-emitting technologies such as Small Modular Reactors (SMRs), hydrogen, Carbon Capture, Utilization, and Storage (CCUS), and energy storage. While Canada has advanced related roadmaps and introduced tax credits and decarbonization funding, MAC continues to stress the need for these efforts to align with the scale of climate mitigation required.
3. *Self-Consumption and Off-Grid Exemptions:* MAC advocated for the preservation of exemptions for generators not supplying electricity to the grid, as well as for remote and off-grid operations with limited abatement alternatives.
4. *Grid Reliability:* The importance of safe, reliable electricity delivery was a recurring theme in MAC's feedback, especially as grid modernization efforts ramp up.
5. *Green Bond Framework:* MAC supported the inclusion of nuclear energy in the federal Green Bond Framework, which was committed to in the 2023 Fall Economic Statement. The framework's technology-neutrality is essential for enabling diverse decarbonization pathways.
6. *Regional Impacts and Equity:* MAC emphasized that the CER will not affect all regions of the country equally. Regional energy mixes, infrastructure readiness, and access to clean electricity vary significantly, requiring tailored approaches and flexible compliance mechanisms to avoid disproportionate impacts.

On February 16, 2024, Minister Guilbeault released a "What We Heard" report summarizing feedback from prior consultations. It outlined key regulatory refinements that MAC had supported, including:

- Moving from a uniform emissions intensity standard to unit-specific annual emission limits, enabling cleaner units to run longer and support grid reliability.
- Applying a 25 MW threshold collectively to grouped units at the same facility.

- Differentiating cogeneration emissions “behind the fence” from those exported to the grid, and applying limits only to the latter while considering total unit capacity for coverage.

On December 17, 2024, the Government of Canada released the final CER, incorporating several of the industry’s recommendations. ECCC is now focused on supporting implementation and compliance ahead of key regulatory milestones. MAC will continue engaging members on rollout details and collaborating with government to ensure the regulatory framework remains workable for mining operations and supports Canada’s broader climate ambitions.

### **Competition Act Amendments – Greenwashing Provisions (Bill C-59)**

In 2024, the Energy and Climate Change Committee actively engaged on the implementation and implications of the *Competition Act*’s new greenwashing provisions, introduced through Bill C-59, which received Royal Assent on June 20, 2024. The amendments, which came into force immediately, prohibit businesses from making unsubstantiated environmental claims and place the burden of proof on them to demonstrate compliance using vaguely defined “internationally recognized methodology.” This abrupt shift has created significant compliance challenges, raising legal and reputational risks for companies and potentially deterring legitimate environmental communications.

With fines of up to \$10 million for non-compliance and the spectre of retroactive scrutiny—even though private enforcement is delayed for one year—many businesses have adopted a cautious approach, reassessing their environmental messaging while awaiting further government guidance.

Over the summer of 2024, the Government of Canada launched a public consultation on these amendments. With strong committee member support, MAC submitted comments and detailed responses to the consultation questions, highlighting the practical and legal challenges posed by the new requirements. It is understood that the Competition Bureau received extensive stakeholder input and released a proposed approach for further comment.

On December 23, 2024, the Bureau initiated a follow-up consultation on proposed guidelines for environmental claims. The draft guidance outlines new requirements for businesses to ensure environmental claims are clear, accurate, and verifiable, including the use of proper testing, third-party validation where possible, and adherence to recognized methodologies. Comments on the draft guidelines were due by February 28, 2025.

### **Amendments to the Clean Fuel Regulation for the Inclusion of Mining Electric Vehicles without Onboard Rechargeable Batteries in Credit Generation**

In collaboration with the Climate Change Committee, MAC staff submitted a letter to the Minister of Environment and Climate Change (ECCC) outlining our concerns regarding the Clean Fuel Regulation’s (CFR) credit generation framework. Specifically, MAC has proposed the inclusion of mining electric vehicles without onboard rechargeable batteries to be eligible for credit generation under Compliance Category 3. This adjustment aims to accelerate decarbonization by supporting the mining sector’s efforts and acknowledging the environmental benefits of these vehicles.

Tethered Electric Vehicles (TEVs) refer to mining electric vehicles without onboard rechargeable batteries, similar to trolley-busses used in cities across Canada. These vehicles maintain a connection to an external source of electricity – displacing diesel consumption and delivering significant greenhouse gas (GHG) emissions reductions. They will act as a key transitional technology on the route to fully electric vehicles.

Presently, the CFR does not encompass such technologies, permitting only electric vehicles “propelled by an electric motor whose source of electricity is a rechargeable battery that is charged from a source of electricity that is not on board the vehicle.” It is actually the CFR definition of a ‘charging station’ that places the rechargeable battery on board the vehicle. MAC is requesting a reconsideration of the definition(s).

Furthermore, MAC staff met with ECCC’s Minister’s Office as well as departmental officials to discuss our request in more detail. While both the Minister’s Office staff and departmental officials recognize the benefits of this technology in delivering GHG emissions reductions, they noted that the definition(s) are engrained in the law and would require reopening the CFR regulations. At this point, there is no intention to open up the regulations, but this will be an area of consideration for the 2027 regulatory review. The regulatory review process will likely take almost 2 years to complete. Therefore, we are looking at an amendment by 2029 or at a point when BEV technology would likely be ready.

#### **Industry/Government Climate Policy Working Group**

MAC staff continue to participate as a member in the Industry/Government Climate Policy Working Group to discuss climate and energy transition policy with industry colleagues and representatives from the Government of Canada at the Assistant Deputy Minister (ADM) level. ADM-level representatives from ECCC, ISED, Finance Canada, PCO, NRCan, ACOA, and Transport are involved.

#### **Border Carbon Adjustments**

As Canada and other countries strive to meet international climate commitments, variations in policy approaches and implementation timelines may pose challenges to coordinated global action. A key concern is addressing these disparities in a way that reduces greenhouse gas (GHG) emissions while mitigating pressures on international trade and maintaining Canada’s global competitiveness. The efficacy of Border Carbon Adjustments (BCAs) is being explored as a potential solution.

The 2024 Fall Economic Statement outlined the government’s proposed approach and roadmap, emphasizing that BCAs are intended to level the playing field for responsible Canadian companies by ensuring that foreign businesses exporting to Canada also account for their emissions.

In 2023, the European Union implemented its Carbon Border Adjustment Mechanism on carbon-intensive products such as cement, steel, and aluminium. Meanwhile, the United States has introduced several legislative proposals with similar objectives. However, the approach of the next Canadian government remains uncertain, and policy direction may shift depending on the outcome of the upcoming election. Additionally, uncertainties surrounded the potential stance of a future Trump Administration could continue to influence U.S. climate and trade policy.



The Government of Canada intends to continue working with key emissions-intensive and trade-exposed (EITE) sectors to assess the emissions intensity of domestic production. Ongoing stakeholder engagement is exploring potential measures to address high-emission imports, including BCAs and emissions standards. Canada is also collaborating with like-minded international partners—such as the G7, WTO, OECD, and IEA—to mitigate carbon leakage risks through both bilateral and multilateral approaches.

Key considerations for the Energy and Climate Change Committee include the limitations of current technology in tracing life-cycle carbon intensity; the potential marginalization of Canada's renewable energy advantage under Scope 1 emissions frameworks; and the reliance on uncertain WTO processes for trade dispute resolution in the absence of free trade agreements. Furthermore, MAC emphasizes the importance of maintaining EITE protections for the mining sector and opposes any replacement of these protections by border carbon adjustment regimes.

### **Nuclear Energy/Small Modular Reactors (SMRs)**

On June 12, 2024, during MAC's Board of Directors meeting, Pierre Gratton and John Gorman (former President & CEO of the Canadian Nuclear Association (CNA)) signed a Memorandum of Understanding (MoU) outlining guiding principles to foster collaboration and cooperation. The agreement aims to promote the use of nuclear energy and small modular reactors (SMRs) in sustainable mining development and to ensure effective coordination and alignment of efforts.

As a next step, CNA and MAC are developing a joint report—expected in late spring 2025—on the challenges and opportunities associated with the use of nuclear power in mining. The report aims to support informed decision-making by industry, government, and regulators. This initiative brings the MoU to life with tangible outcomes and reflects the shared commitment to “facilitate knowledge sharing and collaboration on technologies, safety measures, and innovation to develop cleaner and more efficient mining practices through the integration of nuclear and SMR solutions.”

The report will address the market potential, challenges, and opportunities for nuclear energy in mining. While it will not provide a detailed quantification of total market potential, it will present a broad overview. The report is not intended to resolve the identified challenges but to highlight and describe them—laying the groundwork for more detailed analysis in future phases led by CNA and/or MAC.

The project team comprises representatives from CNA and MAC, supported by a small group of expert advisors from MAC's Energy and Climate Change Committee and the nuclear sector. Other stakeholders, such as Natural Resources Canada (NRCan) and the Canadian Nuclear Safety Commission (CNSC), will be consulted for input as appropriate throughout the project.

## NORTHERN AFFAIRS COMMITTEE

Chair: Vacant

*The Northern Affairs Committee (NAC) contributes to the federal policy, legislative and regulatory environment to enhance the competitiveness of mining companies operating in Canada's remote and northern regions and to facilitate sustainable growth in the Canadian mining industry.*

Given current geopolitical tensions, the strategic importance of Canada's North is increasing, particularly with global warming expected to open up the northwest passage. As the best way to secure the vast northern territories is to occupy it, mining offers more than just economic opportunity but also a means of strengthening our presence in the region. Further, as the north hosts many deposits of critical minerals essential to defence, semi-conductors and clean technologies, northern mining has a pivotal role to play in supplying the materials needed to meet this growing demand.

While the mining industry is truly pan-Canadian, with operations from coast to coast to coast, it is particularly significant to remote and northern Canada. Mining is the largest private sector driver in Canada's Arctic, employing approximately 8,500 people (roughly one in every six jobs). These numbers expand when the northern regions of Manitoba, Saskatchewan, Quebec, Ontario, and Newfoundland and Labrador are incorporated.

Mining is the largest economic driver in Canada's North. Mining, quarrying and oil and gas extraction were responsible for 13% of the GDP in the Yukon, 22% of GDP in the Northwest Territories, and 43% of GDP in Nunavut. The mines operating in the Northwest Territories and Nunavut are the largest private sector contributors to each territory's economy.

In 2023, there were three diamond mines operating in the Northwest Territories. In Nunavut, there were three gold mines and one iron mine in operation. Yukon had three operating mines in 2023: one gold, one silver, and one copper mine. Natural Resources Canada (NRCan) is tracking 10 major mining projects in the north: nine in the planning phase and one under construction.

Proportionally, the industry is the largest private sector employer of Indigenous people in the country, and the territories host the highest per-capita demographic of Indigenous people of any sub-national jurisdiction in Canada. Arctic College in Nunavut offers mining-related training and education. Mining is also the largest private sector business partner of Indigenous-owned enterprises in the North, responsible for helping to develop many successful Indigenous businesses, some that have grown and now serve customers beyond the mining sector. As such, more so than any other region in the country, strengthening northern peoples and communities means advancing Indigenous economic reconciliation.

Mining has had a transformative effect on northern and Indigenous communities through generating employment, skills training and, in some cases, royalty or direct equity shares, all while paying taxes and royalties to governments. While these contributions are substantial, the potential is even greater.

Locating, developing and operating mines in the northern regions of Canada's provinces and across the three territories is challenging. Raising awareness of the costs, challenges and opportunities that mining presents for northern Canada is a key priority of MAC's Northern Affairs Committee. The committee's focus is to work with governments to ensure the industry has a clear, effective and efficient regulatory permitting process, and to highlight the need for strategic infrastructure investments.

### **Northern Infrastructure Developments**

The future of Canada's mining industry increasingly lies in remote and northern regions, yet the lack of infrastructure in these areas presents significant challenges. As a leading global producer of responsibly sourced minerals and metals, Canada has the potential to become the world's foremost supplier of critical minerals essential for a lower-carbon economy. Achieving this goal will require building new infrastructure, developing northern mines, and fostering innovation.

However, mining projects in Canada already take an average of 10 to 15 years from discovery to production, and northern projects face even greater challenges due to the severe infrastructure deficit. This makes the North one of the most expensive regions in the world for mining. For Canada to fully realize its potential as a global leader in mining, a greater emphasis on infrastructure development is essential.

MAC has actively advocated for strategic programs that help reduce the infrastructure deficit and improve the investment attractiveness of the North. MAC and mineral industry partners undertook extensive research – [Levelling the Playing Field](#) – on how remote and northern mining costs compare to those in the south. Our research indicates that it costs 2-2.5 times more to build the same precious or base metal mine in the North (off-grid) and 60% more to operate than the same mine in a centrally located region. Most importantly, 70% of this cost differential derives from the infrastructure deficit. These heightened costs also decrease the attractiveness of exploration investment, which is critical to discovering the future pipeline of Canadian mining operations.

MAC was pleased with announcements from the Critical Minerals Infrastructure Fund (CMIF) regarding critical minerals infrastructure developments in northwest B.C. and the Yukon. Notably, the proposed 765-kilometre high-voltage transmission line, which aims to connect the Yukon electrical grid to the North American grid in B.C., represents a game-changing development for the mining industry in these regions. By providing a stable and reliable energy supply, this project will significantly reduce operational costs, making mining projects more economically viable and sustainable. It will help unlock the vast mineral potential of Yukon's Cassiar and Tanana regions and B.C.'s Golden Triangle, supporting critical mineral production of cobalt, copper, molybdenum, nickel, platinum group metals, tungsten, and zinc. This enhanced infrastructure is key to accelerating the development of mining projects, creating jobs, and strengthening Canada's position as a global leader in the supply of critical minerals essential for the transition to a low-carbon economy.

While these announcements are a great start, much more needs to be done to address the infrastructure gaps that continue to limit the full potential of Canada's northern mining sector. The North is crucial to meeting Canada's critical minerals and battery value-chain objectives, especially as much of Canada's current nickel and cobalt production takes place off-grid. Strategic investments

in energy infrastructure—such as the Taltson and Kivalliq Hydro grids—and promising emerging technologies like off-grid small modular reactors are essential to reducing northern reliance on costly and higher-emitting fossil fuels. Communications and transportation infrastructure are also essential to enhancing the mining supply chain and come at a much higher cost than those sites located in less remote jurisdictions.

Specifically, the Kivalliq Hydro-Fibre Link, an Inuit-led project, will deliver renewable energy and broadband services to underserved remote communities while enabling the region's mining sector to flourish. This project offers a unique opportunity to decarbonize Nunavut's communities and industries while enhancing quality of life and connectivity. The resulting environmental and economic benefits will address two pressing challenges simultaneously.

Without strategic, wealth-generating infrastructure development to boost investment competitiveness, these northern regions and their inhabitants will remain disproportionately reliant on transfer funding for core services and program delivery—often at lower standards than in southern Canada. Enhancing infrastructure is not only vital to attract investment but also to reducing reliance on expensive, higher-emission fossil fuels and fostering sustainable economic growth. Better policy cohesion is required in the critical minerals, climate, Indigenous reconciliation, and clean technology spaces to ensure that the prosperity that mining has brought to Canada's North—and the future Canada needs the North to play—isn't compromised. Infrastructure development, improving the impact assessment and regulatory processes, and providing greater support for operations in the North will do much to ensure our industry is well-positioned to provide the minerals and metals needed both within Canada and around the world.

### **Arctic and Northern Policy Framework**

MAC has long supported the government's adoption of a new Arctic and Northern Policy Framework (ANPF) – an initiative that, as implemented, will plug a significant policy gap at the federal level and has as its goal bridging multiple gaps in the quality of life between northerners and southerners, including Indigenous communities.

After several years of engagement at multiple levels of government, MAC was pleased to see upon its release that the ANPF recognizes how critical addressing the infrastructure gap is to the social and economic objectives in Goal 2 that focuses on strategic infrastructure. The focus on the importance of optimizing resource development, including in the mining and energy sectors, as a foundation on which strong, sustainable, diversified and inclusive local and regional economies can be built, was appreciated.

Unfortunately, work on the Framework was delayed due to COVID-19 and it has not resumed.

### **Climate Change And Energy**

High energy costs in the North have long served as a strong incentive to maximize energy and fuel efficiency, but evidence suggests that the proverbial “low-hanging” fruit are gone, meaning future improvements will be incremental and gradual, barring a technological breakthrough. Moreover, fuel switching opportunities in remote and northern Canada are limited and contingent on geographical considerations. Together, the infrastructure deficit and the state of currently available technologies do not provide sufficient options to displace diesel (and associated emissions) in the time frame needed, nor on the scale required, so that companies absorb the carbon price almost exclusively as a cost of business.

A core component of MAC’s engagement with decision makers in all consultation contexts that pertain to climate change policy or regulation, is ensuring the sensitivity to remote and northern off-grid operations is understood and taken into account as well as advocating for recognition of off-grid mining operations in government programs. Better policy cohesion is required in the critical minerals, climate, Indigenous reconciliation, and clean technology spaces to ensure the prosperity that mining has brought to Canada’s North, and the future Canada needs the North to play, isn’t compromised.

### **Nunavut Land Use Plan**

In June 2023, the Nunavut Planning Commission (NPC) released a Recommended Nunavut Land Use Plan (RNLUP), which is now being considered by the signatories to the Nunavut Agreement (Canada, Nunavut and the Nunavut Tunngavik Inc.). While the RNLUP recognizes the role of mining in Nunavut and commits to balancing social, environmental, and economic interests, outstanding issues with the approach for addressing areas where existing mineral rights and proposed ancillary activities overlap with proposed Limited Use areas. Working closely with the Northwest Territories and Nunavut Chamber of Mines, MAC has developed constructive recommendations that would strengthen the Plan’s approach to addressing existing rights and offer a path forward for projects in Nunavut. In 2024, MAC engaged members of the Northern Affairs Committee with Nunavut projects/operations and organized several meetings with senior officials from key federal departments to discuss the RNLUP.

## INTERNATIONAL SOCIAL RESPONSIBILITY (ISR) COMMITTEE

Chair: Monica Moretto, Vice President, Social Sustainability, Diversity and Inclusion, Pan American Silver

Vice Chair: Simon Jimenez, Chief Advisor, Human Rights & Social Performance, Rio Tinto

*The International Social Responsibility Committee's mandate is to review international issues that affect the interests of the members, as well as identify emerging issues, set priorities, and develop policy advice and strategies for the MAC Board of Directors.*

### **Federal Policy Related to Canadian Mining Abroad**

#### **Federal Supply Chain Transparency Initiatives**

MAC continued to engage with the federal government, providing feedback to improve and clarify requirements for annual reporting required by the *Fighting Against Forced Labour and Child Labour in Supply Chains Act* that became law in May 2023. The law established a mandatory annual reporting regime for Canadian companies (from all sectors who meet the reporting entity threshold) to assess supply chains and outline company action to eradicate forced or child labour.

#### **Human Rights Due Diligence (HRDD) legislation**

MAC, in partnership with other sectors, continued to engage with the federal government on their plan to introduce legislation to expand the *Fighting Against Forced Labour and Child Labour* and include mandatory human rights due diligence measures. No legislation was introduced in 2024. We will continue to engage constructively on this important topic in 2025.

#### **MAC Participation in the Development of an RBC Standard for Canada**

A key component in Global Affairs Canada's (GAC) renewed 2022 Responsible Business Conduct (RBC) Strategy for Canada was the development of a voluntary national standard for human rights due diligence. The process is being run by the Canadian General Standards Board and MAC staff are participating, including serving as Vice Chair of the Technical Committee. Work on the standard continues in 2025.

#### **Canadian Ombudsperson for Responsible Enterprise (CORE)**

2024 marked the departure of Sheri Meyerhoffer from the CORE position after completing her 5-year term and the appointment of Masud Husain as the interim CORE. The appointment of an interim ombudsperson coincided with the commissioning of a GAC-lead review of the CORE's terms of reference, the results of which had not been published as of the end of 2024.

#### **Dialogue with Investment Community**

Regular engagement with the investors provides MAC members with valuable intelligence on the industry's reputation among the investment community, and an opportunity to discuss and identify trends, challenges, and opportunities that benefit all.

In 2024, with the support of our partner Millani, MAC continued hosting its annual investor dialogue series. Two dialogue events were held; the first in Vancouver in late May on the side of the Responsible Investment Association Conference, and the second in Toronto in conjunction with the Principles for

Responsible Investing (PRI) conference, an international investor conference. The dialogue in Vancouver focused on double materiality<sup>1</sup> in reporting, and provided an opportunity for MAC and its members to demonstrate the sector's innovation and continuous improvement in disclosure practices, and the process by which they are developed. [Recent Millani research](#) has shown that the mining sector has adopted this form of reporting far faster than most other sectors. The Toronto event also promoted Canada's mining sector as key to the transition to a lower-carbon economy to an audience of global investors.

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<sup>1</sup> Double materiality assesses sustainability-related topics based on both their impact and financial materiality.

## MINING INDUSTRY HUMAN RESOURCES COUNCIL

Executive Director: Ryan Montpellier

Board Chair: Jenine Ellefson, VP, Human Resources, North America Newmont

Board Vice-Chair: Sherry Iskander, Senior Director, Centre of Excellence, Processing and Technology, Rio Tinto

The Mining Industry Human Resources Council (MiHR) is Canada's knowledge centre for mining labour market information. An independent, non-profit organization, MiHR leads collaboration among mining and exploration companies, organized labour, contractors, educational institutions, industry associations and Indigenous groups to identify opportunities and address the human resource (HR) and labour market challenges facing the Canadian minerals and metals sector.

MiHR's vision is to build an inclusive, skilled and sustainable Canadian mining workforce that anticipates and adapts to volatility and innovation – and its sector-specific LMI and HR research, National Occupational Standards (NOS), worker certification, essential skills and work-readiness training form the backbone of industry's collaborative approach to addressing workforce issues.

Financially supported by the Mining Association of Canada (MAC), the Government of Canada and other program revenue, MiHR is governed by a 12-person Board of Directors that includes six representatives from MAC and its member companies. Members include representatives from Agnico Eagle, Cameco, Newmont, Rio Tinto, Suncor, and Teck. Other Board seats are filled with representatives from organized labour, industry contractors and post-secondary educational institutions. The Board ensures the organization's mission, values and activities deliver tangible results. MiHR also brings together a network of over 250 volunteers to help inform its research and guide its project committees.

### Key Priorities

MiHR's new 2025-2029 Strategic Plan focuses on increasing awareness of mining careers, identifying and addressing skills gaps, delivering essential and work-readiness skills to Indigenous peoples and underrepresented groups, providing more work-integrated learning opportunities, promoting respectful workplaces and the recognition of skills and training across the sector.

Canada's mining industry is facing a people crisis, with a tightening labour market caused by numerous factors including an ageing workforce with rising retirements while fewer young people enter the industry; shrinking post-secondary mining programs (e.g., undergraduate mining engineering enrolment is down 50% from 2012 to 2023); a low mining unemployment rate; and continued challenges to attract and retain underrepresented groups.

As such, MiHR submitted a \$5.5 million solicited proposal to Employment and Social Development Canada (ESDC) under the Sectoral Workforce Solutions Program (SWSP) that would support several components of the Council's strategic plan for four fiscal years. ESDC's decision on the proposal will be determined in 2025.



## Program Highlights

A tight labour market is an increasingly significant obstacle for mining employers, driving up recruitment costs, wages and increasing talent poaching among companies. Additionally, with changing geo-political and trading alliances, Canada needs to rapidly develop its critical mineral capacity to support itself and its allies. Canada is well positioned to produce some of these key minerals and metals but requires a highly skilled and mobile workforce to be able to capitalize on these opportunities.

The following is a list of key MiHR programs to support the sector.

**Labour Market Information (LMI):** MiHR produces labour market intelligence to uncover labour market trends, support the identification of supply and demand imbalances and proactively develop labour market strategies. This valued, actionable and responsive labour market information supports the decision making and strategic objectives of mining stakeholders, including governments, employers, communities and many others. MiHR analyzes labour supply gaps, workforce barriers and diversity goals – and develops occupational and skills labour force profiles, career planning tools and analytics systems.

Of note, MiHR released multiple reports in 2024 that examined labour market conditions and key areas where the mining sector may encounter labour market challenges over the next decade, including the [Canadian Mining Workplace Profile 2024](#); [Canadian Mining Outlook 2024](#); [Equity Deserving Groups in Canada's Mining Industry](#); and occupational spotlights on [Mining Engineers](#), [Geoscientists](#) and [Geological and Mineral Technicians](#).

MiHR is preparing for the next iteration of its annual Labour Market Outlook and Workplace Profile reports. The labour market information team also performs regular data updates to the [Monthly Labour Market Dashboard](#) and the [Canadian Mining Workforce Analytics](#) data visualization tool.

**Mining Career Awareness and Engagement:** To address the talent crisis, MiHR developed the [Mining Needs You](#) career awareness initiative to showcase modern mining to youth with the goals to raise awareness of mining and its profile, support industry human resource efforts, and make mining a career of choice for students. *Mining Needs You* is governed by MiHR's Careers Committee, consisting of companies and other industry representatives, education and youth.

In November 2024, MAC members provided MiHR with \$500,000 towards year one of an intended five-year national *Mining Needs You Career Awareness Campaign Coalition* to take a sectoral approach to solving the talent crisis. PDAC has also contributed \$100,000, CIM \$31,000 and the World Gold Council approximately \$250,000.

Since securing funding, MiHR has developed a year one implementation plan and work breakdown that was reviewed by the Careers Committee. MiHR also secured marketing and design agency Spark\*Advocacy to assist in implementing the campaign. In association with Spark\*, MiHR has:

- Selected 10 communities of interest to focus targeted advertising, with two communities to be used in a pilot project later in the spring of 2025.
- Developed a campaign messaging document.
- Identified all to-be-updated and created marketing material, occupations to feature in career videos and all events to participate in in 2025.
- Begun a redesign of MiningNeedsYou.ca to convey the new campaign – launched to coincide with the pilot project.
- Continued recruiting [career ambassadors](#), and updating the ambassador toolkit, training materials and PowerPoint presentations to align with the campaign.
- Created a quarterly progress reporting template to report success to funders.

MiHR also continued its work on a \$230,000 project with the Government of Alberta to assess labour demand for critical mining occupations, investigate points of attraction along tight labour supply pipeline, and develop Alberta-specific customized career initiatives based on *Mining Needs You*. MiHR ran a social media video scholarship contest as part of the project. MiHR also awarded two post-secondary students with [I Chose Mining. Mining Chose Me. Scholarships](#) in late 2024.

**National Occupational Standards (NOS), Training and Recognition:** MiHR's [suite of NOS](#) establish clear, objective skills and knowledge benchmarks required for workers to perform in a particular mining industry occupation. The NOS are updated to reflect the shifting skills resulting from technology, automation and emerging environmental, social and governance standards – and are the foundation of MiHR's training and recognition of worker skills and competencies:

- **[The Canadian Mining Training Recognition Program \(CMTRP\) & National Occupational Training Standards \(NOTS\)](#):** The NOTS inform standardized training development and delivery across the industry. The CMTRP recognizes employers, educational institutions and training organizations that align their training programs to the NOTS. Thirteen training programs have been recognized.
- **[Canadian Mining Certification Program \(CMCP\)](#):** Provides a competency-based assessment of an individual's documentation of training and workplace experience against a specific NOS. More than 2000 certificates have been issued through the program.
- **[Mining Essentials and Mining Potential](#):** Industry validated national mining training programs for Indigenous peoples and for youth, women and new Canadians to develop the essential skills, knowledge and confidence needed to achieve rewarding employment in mining. Since its inception, over 800 learners have enrolled in Mining Essentials.
- **Digital Upskilling in Mining:** MiHR partnered with the Business + Higher Education Roundtable (BHER) to develop a digital literacy training standard for the mining industry and digital literacy training learning outcomes and objectives – with the goals to graduate 160 individuals in Digital Literacy in Mining and to have 120 of them employed within six months of graduation.

**Supports for Respectful and Inclusive Workplaces:** MiHR develops and implements action-oriented programs and tools that help build an inclusive, diverse and sustainable Canadian mining workforce:

- **[EDI Toolkit for Mining Companies](#):** To help drive systemic change and innovation, MiHR produced series of guides, tools and reports to help mining organizations develop and implement a corporate EDI strategy. The toolkit is based on MAC's Towards Sustainable Mining (TSM) Equitable, Diverse, and Inclusive Workplaces Protocol.

- **ENSEMBLE: The Mining Diversity Network:** A free online social network of professionals interested in supporting and driving diversity and inclusion in Canada's mining industry.
- **eLearning Modules:** Gender Equity in Mining, Bias, Systemic Discrimination and Anti-Racism, Indigenous and Intercultural Awareness modules enrich awareness of gender diversity; support workplace gender equity and inclusion; enhance awareness and advance inclusion, equity, anti-racism and reconciliation. **MAC mandated that all its staff undertake the Indigenous Awareness Training** and eLearning modules continue to have significant uptake from industry stakeholders:
  - Gender Equity in Mining Training: over 4,500 enrolments
  - Intercultural Awareness Training: over 4,500 enrolments
  - Indigenous Awareness Training: nearly 4,000 enrolments
- **Safe Workplaces for All:** In 2021, the Department of Justice provided nearly \$400,000 in funding support to MiHR for a three-year project ending March 31, 2024, to support mining and mineral exploration companies to expand their knowledge of and to address sexual harassment in the workplace. The program developed a program report, infographic and multiple public legal education information on workplace sexual harassment.
- **Changing Culture: Advancing Women's Participation and Prosperity in Mining** – MiHR received over \$700,000 in funding from Women and Gender Equality Canada (WAGE) to deliver a three-year project that is developing training and tools and increasing collaboration with sector stakeholders to support the successful implementation of three of MAC's Towards Sustainable Mining Protocols: Equitable, Diverse and Inclusive Workplaces; Safe, Healthy and Respectful Workplaces; and Indigenous and Community Relations.

### **Other Strategic Programs to Address Labour Market Challenges**

**Gearing Up:** The Government of Canada provided MiHR nearly \$20 million in funding over the past seven years through ESDC's Student Work Placement Program for the Gearing Up project, which helps create work-integrated learning (WIL) opportunities for post-secondary students. Mining employers who create WIL opportunities are offered a wage subsidy of up to \$7,000. Gearing Up has seen significant uptake by MAC members, with over 200 mining companies, contractors and suppliers have participated in the program in support of over 2250 post-secondary students since program inception. MiHR is in the process of securing an extension to the Gearing-up agreement for an additional \$1.8 million to provide up to 240 work placements for the 2025-26 fiscal year.

**Green Jobs:** NRCan's Science, Technology & Innovation Program (STIP) provided MiHR \$700,000 in funding in 2021 for the Green Jobs program to provide employers with wage subsidies up to \$32,000 to help 25 youth gain mining work experience. MiHR received additional funding in 2022 to deliver another 20 placements, and \$2 million in 2023 for 80 placements – split between fiscal years 2023-2024 and 2024-2025. MiHR recently received an additional \$1.4 million in funding to offer 35 placements in 2025-2026.

### **For More Information:**

Visit [MiHR.ca](https://mihr.ca), [MiningNeedsYou.ca](https://MiningNeedsYou.ca), or contact Ryan Montpellier, Executive Director, at [rmontpellier@mihr.ca](mailto:rmontpellier@mihr.ca)

## PUBLIC AFFAIRS COMMITTEE

**Chair: Dale Austin, Head, Government Relations, Cameco Corporation**

*The Public Affairs Committee (PAC) provides MAC member perspectives and guidance on MAC's government relations and communications programming. The PAC is a national platform for MAC member sharing of best practices on issues relating to corporate and association communications and advocacy activities.*

Over the course of 2024, MAC's PAC played an important role in providing a forum for industry communications and public affairs experts to exchange information on issues affecting the sector including, but not limited to, economic competitiveness, trade and tariffs, critical minerals development, Indigenous engagement, sustainability, supply chain and labour market shortages, and the role the industry can play in supporting a low carbon future.

### **Federal Advocacy**

By providing feedback on MAC strategy, messaging and materials to engage federal decision makers on Canadian mining sector issue advocacy, the PAC provides valuable member perspective and insights to enhance the full suite of MAC's government relations activities. The Committee also monitors and discusses policy developments and actively participates in MAC advocacy activities.

MAC's annual large scale advocacy event took place in-person in Ottawa in November where staff, MAC Board members and PAC members met with over 100 Parliamentarians and federal government decision makers. Meetings focused on the need for legislative amendments to key mining tax credits, clear, timely and efficient federal regulatory processes for existing and new mines, critical to Canada's economic competitiveness, and to meeting our shared climate change, critical minerals, Indigenous economic reconciliation, and supply chain security goals. Additionally, discussions took place on mining's labour market challenges, innovations taking place at Canadian mines, and the positive impact of Canadian mining abroad. MAC's PAC participated in this advocacy initiative and also provided essential input into the materials that were prepared as part of this important GR outreach.

MAC's 2024 engagement with federal decision makers continued to include significant focus on federal government support for Canada's minerals and metals industry, with the goal of seizing opportunities for Canada relating to critical minerals, supply chain resiliency, and growing Canada's Battery Electric Vehicle (BEV) supply chain. Throughout, MAC continued to highlight challenges with project review and permitting, an enabling policy essential to meeting Canada's mineral ambitions.

### **Communicating the Mining Industry's Challenges and Opportunities**

In 2024, MAC's communications efforts highlighted the sector's commitments to sustainability, our strong record of Indigenous participation and the industry's innovation efforts. MAC also underscored the importance of the industry to a low carbon economy, which will increase the demand for minerals and metals. The race for critical minerals development was highlighted in MAC's communications and advocacy efforts.

### **Towards Sustainable Mining (TSM)**

The ongoing expansion of the TSM program continues to be an important element of our public outreach strategy. This narrative aligns with the government's priorities and serves to advance MAC's advocacy efforts.

### **Digital Communications and Social Media**

MAC continues to have a very active presence on both Twitter and LinkedIn, with a combined following of over 59,000 as of December 31, 2024 – this represents a 10% increase over the previous year. The PAC plays a valuable role in providing social media content and suggestions and is key to MAC's success in social engagement.

In addition to running MAC's social media channels, the association also runs social channels associated with TSM where MAC members' work in sustainability is profiled.

### **Canadian Mining Public Awareness Campaign**

Since 2012, MAC has produced annual communications campaigns on the contributions of Canada's mining sector, primarily to federal decision makers in Ottawa, with a focus on social media channels. The PAC plays an integral role in this process, from providing concept ideas to refining the campaign's messaging.

In 2024, MAC's annual public awareness campaign focused on the race to produce the critical minerals necessary to drive the transition to a low-carbon economy, as well as essential role of mined materials to the products we use every day, the industry's commitment to sustainable mining and the opportunity before Canada regarding critical minerals development. MAC's public awareness tagline, *Canadian Mining – Bold from the Ground Up*, is accompanied by a [microsite](#) that focuses on Canada's leadership in sustainable mining and the role the industry can play in providing the materials needed for technologies Canadians and our allies depend on. This campaign centres on digital advertising, using PAC member b-roll video, and is focused on the following audiences:

- Ministers, MPs and Senators, political staff, relevant public servants, policymakers and influencers, including the Parliamentary Press Gallery.
- Political Ecosystem Community including organizations representing the business community, sector specific stakeholders representing extractive, transportation, finance and manufacturing and technology sectors and influential policy groups.
- Provincial Ministers of Mining, Finance, Resources, Environment, Economic Development and their staffs and top level officials.
- Business media that cover national policy issues (e.g., Bloomberg, ROB, Financial Post, etc.)

### **MAC Events**

MAC staff attended and participated in domestic and international events throughout the year to promote Canada's mining industry, and to highlight its challenges and opportunities. The PAC helps identify speaking opportunities at key mining events and functions and supports MAC events through their attendance, promotion and, at times, sponsorship. Throughout the year, MAC participated in several mining conferences across Canada including the PDAC convention, Mineral Outlook Dialogue, and many others. MAC also plays an active role in international mining events, participating in a variety of discussions at Africa's Mining Indaba, Mines & Money, and TSM partner events around the world.

MAC participated in its annual flagship address to the Greater Vancouver Board of Trade in September of 2024, focusing remarks on the need for expedited approval and permitting processes, the opportunity critical minerals development represents for Canada, public support for mining and the importance of incorporating EDI into ESG standards.

## SCIENCE COMMITTEE — ANNUAL REPORT

Chair: Kent England, Director, Climate Change, Environmental Affairs and Geo-Environmental Engineering, Cameco Corporation

*The Science Committee focuses primarily on issues related to regulations under the Fisheries Act, specifically the Metal and Diamond Mining Effluent Regulations and proposed regulations for coal mines and oil sands mines. In 2024, MAC's Science Committee met jointly with the MAC Environment Committee, holding two face-to-face meetings and monthly virtual meetings.*

### **Metal and Diamond Mining Effluent Regulations (MDMER)**

In late 2021, MAC initiated the development of a guidance document to help companies meet the MDMER requirements to conduct studies of selenium in fish tissue. The objective was to develop “fit for purpose” guidance that aligned with the specific MDMER requirements, as well as the broader MDMER requirements for environmental effects monitoring (EEM). This process was undertaken after ECCC declined to collaborate with MAC in the development of guidance. The document was finalized and released by MAC in September 2023. The document is available on the MAC website at: <https://mining.ca/resources/guides-manuals/guidance-on-conducting-studies-of-selenium-in-fish-tissue/>

In June 2024, ECCC responded to the guidance prepared by MAC, stating that some of the recommendations in the guidance developed by MAC “may lead to mines not meeting MDMER requirements if followed.” Examples cited by ECCC encompassed many areas addressed by the MAC guidance. MAC does not agree with this assessment, and many of the examples cited are outside the scope of the legal requirements of the MDMER. ECCC also indicated that they were working on draft guidance. This draft was subsequently provided to MAC for comment in late December 2024.

In September 2024, ECCC sent letters to mines subject to the MDMER, informing them that ECCC officials will no longer be reviewing study designs or interpretive reports submitted to ECCC in accordance with the MDMER requirements for environmental effects monitoring (EEM). MAC expressed concern about this, noting that ECCC officials had been reviewing study designs and interpretive reports since the introduction of the EEM requirements in 2002 and that input from ECCC officials has proven valuable and useful.

### **Proposed Coal Mining Effluent Regulations (CMER)**

In January 2022, ECCC provided an updated proposal for *Fisheries Act* regulations for coal mines. This was more detailed than previous proposals provided by ECCC, which was a positive development, as the lack of detail in previous proposals had been a significant concern. In March, MAC submitted detailed comments on this proposal.

In 2023 and 2024, ECCC conducted bi-lateral engagement with various groups, including Teck Resources. However, ECCC did not engage MAC directly. ECCC did not provide an updated proposal or provide a formal update on the status of the development of the draft regulations. In fall of 2023, ECCC had informed MAC that they intend to publish the proposed regulations in the *Canada Gazette*, Part I in June 2024. In January 2024, MAC was informed that this has been pushed back to fall 2024. Later in 2024, MAC was informed that this has been further pushed back to spring 2025.

### **Potential *Fisheries Act* Regulations for Oil Sands Mines**

MAC and our members involved in oil sands mining have been advocating for more than a decade for a Fisheries Act regulation for oil sands mining. At present, no such regulations exist, as they do for metal and diamond mines, and oil sands mines do not deposit any effluent. Instead, all water is stored on site, including water from snow and rain falling on disturbed areas of the sites. While some water is reused in processing to recover bitumen, the volume of water stored at oil sands mines continues to increase. This water is stored primarily in tailings facilities, and removing this water is an essential first step in the reclamation of these facilities. Treatment and release of water is necessary to be able to remove sufficient water from the oil sands mine sites to facilitate reclamation and meet closure objectives.

MAC has been engaged with ECCC since 2017 on the development of regulations. In 2021, ECCC formed a Crown-Indigenous Working Group (CIWG) to work collaboratively with Indigenous groups, and ECCC continued to work with the CIWG throughout 2024. In 2024, this included technical analysis of alternatives to water release, water treatment technologies, and policy alternatives. CIWG subgroups are also working on several other topics including toxicity and environmental effects monitoring, and options for an active regulatory approach.

The report for Phases 1 and 2 of the assessment of alternatives to water release was provided by ECCC in early 2024 and industry submitted comments, including questions regarding the methodology used.

The release of the assessment of alternatives built upon the 2023 release of an engagement paper “to provide interested parties with an update on the work completed by the CIWG to date, an overview of the collaborative process established through the CIWG, and an opportunity for early feedback.”

MAC submitted comments in collaboration with our members that included three key requests:

- Provide clear timelines on future steps in the process, including key milestones in the process of developing and implementing a regulation.
- Develop and implement a plan to ensure ongoing effective industry engagement going forward.
- Undertake a study of the impacts and risks of not allowing the release of treated water from oil sands mines.

In May 2024, ECCC released a summary of the comments on the engagement paper. ECCC committed to providing more detail about timelines and milestones but as of the end of 2024 this had not yet been provided. In the fall of 2024, industry engaged with the CIWG to provide technical input regarding ongoing work on alternatives. This was the first direct industry engagement with the CIWG.

ECCC was planning to release a discussion paper on a regulatory framework for an oil sands mining effluent regulation by the end of 2024, but this was delayed until early 2025.

In May 2024, the Government of Alberta launched a steering committee to “look at all the feasible options for addressing oilsands mine water and tailings ponds and suggest ways to safely reclaim the land and ensure our waterways remain clean for future generations.” In September, MAC was invited to present to the steering committee, particularly to provide perspectives on tailings and water management in other mining sectors. MAC also provided responses to follow-up questions from the steering committee.



### **National Orphaned and Abandoned Mines Initiative (NOAMI)**

Natural Resources Canada (NRCan) has wound down NOAMI and replaced it with a series of annual multi-stakeholder workshops on matters related to orphaned and abandoned mines (OAMs). The second annual workshop, consisting of two half-day virtual sessions, was held in October 2024, with about 150 participants each day. Charles Dumaresq from MAC was the keynote speaker, and the workshop focused on several topics, including:

- Exemplary remediation practices
- The potential and challenge of creating value from mine tailings
- The economic potential of OAM remediation
- Considerations and approaches in clean-up, restoration, and remediation science and practices
- Building capacity, trust, and supportive partnerships with Indigenous Peoples

NRCan is working to migrate archival documents from NOAMI as well as the NOAMI inventory to a new website to ensure that this information is not lost.

### **Mine Environment Neutral Drainage (MEND) Program**

MAC chairs the multi-stakeholder MEND Steering Committee and is the sole source of funding for MEND. One key MEND project, being conducted in collaboration with the International Network for Acid Prevention (INAP), is examining the geotechnical implications of geochemical reactions in tailings and waste rock, and important emerging topics area in understanding risks associated with tailings management. Completion was anticipated by the end of 2024 but was delayed until early 2025.

In September 2024, the International Conference on Acid Rock Drainage (ICARD) was held in Halifax. This was the first time that ICARD has been hosted in Canada since 2012. The conference was a tremendous success with about 450 participants from around the world, and almost 150 technical presentations as well as pre-conference short courses and post-conference field trips. MEND was a sponsor for ICARD, using \$10,000 in reserved funds from ICARD 2012 to sponsor students attending the conference. This included two very enthusiastic undergraduate students who would otherwise have not been able to attend. Charles Dumaresq from MAC was on the organizing committee, co-chaired a technical session on ESG, and also participated in opening and closing panel discussions at the conference.

In late November, the BC/MEND Metal Leaching and Acid Rock Drainage Workshop will be held in Vancouver. This workshop has been held annually since 1995 and is always a popular and well attended event. For 2024, one day of the workshop was devoted to presentations and panel discussions around the theme of decreasing the overall risk of tailings facilities. This day of the BC/MEND workshop was by the MEND Steering Committee. The objective was for practitioners and rights and stakeholders to gain a holistic understanding of:

- What is required to decrease the overall risk of tailings facilities?
- What has been done, and the consequences of these actions?
- What still needs to be done and/or better understood?

**Canadian Ecotoxicity Workshop (CEW)**

CEW 2024 was held in Kitchener-Waterloo. MAC was a workshop sponsor and co-chaired a session on mining and the environment with a representative from one of our associate members, Canada North Environmental Services. The session included 12 presentations and was very well attended and well received. In addition, there was a separate session of 12 presentations on critical and strategic minerals – the first such session at CEW.

## TAILINGS WORKING GROUP — ANNUAL REPORT

Chair: Monica Ansah-Sam, Manager, Global Geotechnical Governance -  
Vale Base Metals

### **MAC's Response to the *Global Industry Standard on Tailings Management***

After the release of the *Global Industry Standard on Tailings Management* (GISTM) in 2020, MAC conducted an analysis of its requirements compared to those in the *TSM Tailings Management Protocol* and three other protocols relevant to tailings management: the *Indigenous and Community Relationships Protocol*, the *Water Stewardship Protocol*, and the *Climate Change Protocol* which addresses climate change adaptation. As an outcome of the analysis, MAC embarked on a two-phase process for updating TSM requirements for tailings management described in the *Tailings Management Protocol* and the Table of Conformance and the supporting guidance provided in:

- A Guide to the Management of Tailings Facilities (Tailings Guide)
- Developing an Operation, Maintenance and Surveillance Manual for Tailings and Water Management Facilities (OMS Guide)

### **First Phase of Updates to the TSM Requirements and Guidance for Tailings Management**

The first phase of updates was intended to address minor gaps in TSM in a timely manner. Updates to the Tailings Guide and OMS Guide were completed in 2021, followed by updates to the *Tailings Management Protocol* and Table of Conformance in 2022 and a further update to the *Tailings Management Protocol* in 2023.

In 2023, there was a further update to the *Tailings Management Protocol*, adding risk-based conditions under which the frequency of TSM reporting could be reduced for inactive tailings facilities, as well as conditions under which the normal frequency of reporting would need to resume.

### **Second Phase of Updates to the TSM Requirements and Guidance for Tailings Management**

A second phase of updates was initiated in early 2023 with a review of the Tailings Guide, but work accelerated in 2024. The intent of this second phase is to drive continual improvement in TSM requirements and guidance for responsible tailings management, and thus continual improvement in performance of owners of tailings facilities. Increased alignment with the GISTM is a secondary but strategically important objective.

The review is informed by various factors, including:

- The gap analysis conducted by MAC after the GISTM was released in 2020.
- Experience with implementation of the TSM requirements and guidance for tailings management.
- MAC participation in the development of the ICMM's 2021 Tailings Management: Good Practice Guide.
- Evolving practices related to tailings management and practices of leading practitioners.
- Experience in implementing GISTM including by MAC members who are also ICMM members.

Proposed revisions to the Tailings Guide will provide a stronger conceptual basis for a systematic approach to tailings management, improved guidance on governance and technical aspects of tailings management, and improved guidance on community engagement related to tailings management. The proposed revisions would also allow the Tailings Guide to be more effectively and meaningfully applied to the planning, design, and initial construction phases of new tailings facilities and help facilitate improved decision-making during those life cycle phases.

More specifically, the proposed revisions will strengthen existing guidance in many aspects of the Tailings Guide and address additional topics, including:

- Accountability and responsibility
- Technical aspects such as risk assessment and management, site characterization, alternatives assessment closure planning, design, construction, water management, etc.
- Managing change
- Emergency preparedness and recovery planning
- Third-part oversight

In 2024, work in the OMS Guide was also initiated, although updates to the OMS Guide is not as extensive. Much of the content in the OMS Guide that overlapped with the Tailings Guide has been removed and consolidated in the Tailings Guide, significantly shortening the OMS Guide. Revisions will focus primarily on sections describing operation and surveillance activities.

Work on the *Tailings Management Protocol* and Table of Conformance will commence in 2025.

The aim is to have the updated Tailings Guide and OMS Guide approved in November 2025, with approval of the updated *Tailings Management Protocol* and Table of Conformance in March 2026.

## TRANSPORTATION COMMITTEE

*The Transportation Committee contributes to the federal policy, legislative and regulatory environment for the transport of minerals and metals to enhance the competitiveness of Canada's mining industry.*

Canada's strength in mining rests on its ability to produce and process minerals competitively and to transport products efficiently to and from domestic and international markets. Mining companies require a reliable transportation network to access markets and compete internationally. This is especially true for Canada, the world's second largest country by land mass.

The mining industry is one of the largest users of Canada's transportation sector, is the single largest industrial customer group of Canada's railways and is a major user of Canada's ports.

Annually, the industry accounts for approximately 50% of total rail freight revenue generated and is the largest single shipping sector in volume by both rail and marine modes of transit.

### **Confidence in Canada's Supply Chain**

The reliability of the domestic supply chain is a significant determinant for mining industry investment given the volume of mineral and metal products transported in Canada. In recent years, reliability in Canada's supply chain has deteriorated significantly due to:

- Increasing frequency of transportation infrastructure failures due to extreme weather events;
- Shippers paying increasingly excessive rates for service from the Class 1 railways;
- Labour actions by railway and port workers; and,
- Civil disruption in the form of rail blockades.

The increasing frequency of these events has led to growing concern by users of Canada's transportation network, foremost among them, Canada's "captive shippers" (most MAC members) who are reliant or "captive" (with no competition) to the single Class 1 railway that provides service to the remote location of their operations. Shipper advocacy coalitions, of which MAC is a member, continue to raise awareness of shipper captivity, railway fuel surcharges, and railroad claims on Canada's rail shipping rates.

### **Persistent Railway Challenges due to Canada's Railway "Dual Monopoly"**

Canada's rail freight system operates primarily as a dual monopoly. Canadian National Railway Company (CN) and Canadian Pacific and Kansas City Southern (CPKC) are Canada's only Class 1 railways. Many communities and businesses, particularly those in remote and northern regions of Canada, are captive to the single Class 1 railway that serves their communities, and this is the case for many MAC members.

The result of the lack of competition is railway market power that is exercised through railway internal/operational decisions that result in rail shippers paying excessive rates and receiving inadequate service.

## **First-Ever Simultaneous Halt of Rail Service from Both Class 1 Railways Catastrophic for Canada in 2024**

Canada's investment reputation took a hit when, for the first time ever, Canada experienced the first-ever, simultaneous halt in service from Canada's two Class 1 Railways in August 2024.

The impacts of disruption extended beyond the inability of mining companies to transport products to and from domestic and international customers and suppliers to Canada's ambitions to supply minerals and metals to the world, particularly as the race for critical minerals intensifies.

### **Railways profiting by charging fuel surcharges (FSCs) that exceed the cost of fuel**

A key issue for shippers, as confirmed by a shipper coalition-commissioned study, is railways charging fuel surcharges (FSCs) that exceed costs of fuel. While both CN and CPKC claim their FSCs are mechanisms for recovering fuel costs not covered by their base rates, the study confirmed the overcharging by both of Canada's Class 1 railways:

- Net CN and CPKC gains from excess fuel surcharges (source railway public disclosures):
  - **CN net gain: C\$566 million** (2013-2022)
  - **CPKC net gain: \$C311 million** (2014-2022)

Over the period covered by the study, CN and CPKC fuel surcharges outpaced increases in their respective fuel costs by 40% (CN) and 31% (CPKC). MAC and other shippers believe that the scope and scale of this issue merits a robust examination, including formally, by the Canada Transportation Agency, in its capacity as Canada's economic regulator of railways.

## **Marine**

Mining is a leading customer of Canadian ports. The Port of Montreal handles large volumes of iron ore and salt, as well as other mineral products such as fertilizer, ores, gypsum and scrap metal. Beyond Montreal, the mining industry is a major contributor to Canada's St. Lawrence Seaway. Shipments of iron ore, coke and coal represent ~20% of total seaway traffic, with iron ore accounting for the second-largest share of any commodity shipped. Steelmaking coal accounts for ~19% of the total overall volume of goods handled at the Port of Vancouver annually, which moves shipments to Japan, Korea, India, China and Taiwan, with movements also directed to Europe and South America. The ability to fluidly transition modes of transportation from ground to marine transport at ports is a critical determinant of Canada's supply chain competitiveness, reliability and credibility.

The International Maritime Organization (IMO) is the global body that regulates pollution and safety practices at sea. MAC continues to appreciate constructive and solutions-oriented engagement with Transport Canada, who lead and coordinate Canada's delegation to the IMO, on a range of marine issues.

As a regular observer on Canadian delegations to IMO, MAC appreciates Canada's reputation for excellence and collaboration at the IMO, and attributes this to the hard work and expertise of our diplomats and technical experts in these areas.

## REPORT FROM THE CHAIR OF THE TOWARDS SUSTAINABLE MINING (TSM) GOVERNANCE TEAM

Carol Plummer, Executive Vice President Sustainability, People & Culture, Agnico Eagle Mines Ltd.

*The TSM Governance Team examines opportunities for improving the mining industry's performance and reputation with key communities of interest.*



Carol Plummer  
Executive Vice President  
Sustainability, People & Culture,  
Agnico Eagle Mines Ltd.

### 2024 TSM Performance

MAC members performed well across the performance indicators of the TSM protocols in 2024. Performance results include both self-assessed and externally verified results, depending on each facility's verification schedule.

**Indigenous and Community Relationships:** Facilities continued to demonstrate improvements in performance on the *Indigenous and Community Relationships Protocol*, with a notable increase in the proportion of facilities reporting Level A or higher on Indicator 4 (Community Impact and Benefit Management).

**Crisis Management and Communications Planning:** Facilities continued to perform well on the *Crisis Management and Communications Planning Protocol*, with minor revisions to the protocol reflected in public reporting for the first time in 2024. In a positive trend, there were notable increases in the proportion of facilities reporting 'Yes' to Indicator 2 (Review) and Indicator 3 (Training).

**Safety and Health:** Facilities continued to report high levels of performance on the *Safety and Health Protocol*. There was, however, a notable decline in facilities reporting Level A on Indicator 5 (Performance) due to fatalities at a few MAC member sites.

**Prevention of Child and Forced Labour Protocol:** Facilities report on the *Prevention of Child and Forced Labour Protocol* every three years during the external verification of TSM performance results. In 2024, all facilities that underwent external verification demonstrated full adherence to the requirements of this protocol.

**Tailings Management:** Facilities reported for the second time on the 2022 version of the *Tailings Management Protocol* and its associated guides. The proportion of facilities reporting Level A or higher was relatively consistent across all five performance indicators, with an increased proportion of facilities reporting Level AAA across all indicators versus the previous year.

**Biodiversity Conservation Management:** Facilities reported improvements in performance on the *Biodiversity Conservation Management Protocol*, particularly on Indicator 2 (Conservation Planning and Implementation) and Indicator 3 (Reporting).

**Water Stewardship:** Facilities continued to report high levels of performance on the *TSM Water Stewardship Protocol*, with a notable increase in the proportion of facilities reporting Level A or higher on Indicator 2 (Operational Water Management).

**Climate Change:** In 2024, MAC members reported for the second time on the updated *TSM Climate Change Protocol*. Scores remained consistent, with over 90% of corporate offices reporting Level A or higher on Indicator 1 (Corporate Climate Change Management). On Indicator 2 (Facility Climate Change Management) and Indicator 3 (Facility Performance Targets and Reporting), about 75% of facilities reported Level A or higher.

In 2026, companies will begin reporting publicly on the new *TSM Equitable, Diverse, and Inclusive Workplaces Protocol* and the updated *TSM Safe, Healthy, and Respectful Workplaces Protocol*.

### **Celebrating Excellence**

The [TSM Community Engagement Excellence Award](#) went to Agnico Eagle for its Reconciliation Action Plan with Indigenous Peoples, a comprehensive strategy for programs and initiatives to benefit Indigenous peoples and enhance efforts towards reconciliation. The [TSM Environmental Excellence Award](#) went to Rio Tinto's Diavik Diamond Mine for their solar plant as an innovative example of renewable energy infrastructure in a remote region.

### **Continual Improvement**

**Assurance Pilot:** In 2024, MAC collaborated with The Copper Mark to pilot a joint approach to assurance for facilities undergoing TSM verification and included several new steps in the TSM verification process. For example, the review of verification plans and reports by staff from MAC and The Copper Mark, a media scan for participating facilities, and a target number of worker interviews to be conducted by TSM verifiers. Many of the elements piloted in 2024 are included in the draft assurance process for the Consolidated Mining Standard Initiative (CMSI).

**TSM Verification and Reporting:** The MAC Board approved important updates to TSM verification and reporting requirements in 2024. Notably, a requirement for site visits by TSM verifiers during the external verification process and for companies reporting scores below Level A to publish action plans demonstrating their intention to work towards meeting a minimum of Level A on all performance indicators.

**Standards Consolidation:** In 2024, MAC continued to work with the International Council on Mining and Metals (ICMM), World Gold Council and The Copper Mark on the Consolidated Mining Standard Initiative (CMSI). The first of two planned public consultations was completed between mid-October and mid-December 2024. Included in this consultation were the draft standard, assurance framework, claims policy and governance. In total, 192 submissions and almost 5000 individual comments were received. Based on the results of the consultation, a second draft of these documents is being developed for a second public consultation planned for the latter half of 2025, with planned completion of the consolidated standard now delayed into 2026.



**Digital Credential Pilot:** MAC continued to collaborate with the Government of British Columbia and the UN Transparency Protocol (UNTP) to develop a digital trusted credential for TSM data. This work was expanded to include the development of a TSM credential aligned with the UNTP (an increasingly common framework for traceability platforms). MAC also worked with Northern Block (the technology provider for the pilot project) to test a centralized registry of TSM digital credentials that will incorporate current and historical TSM data, to be launched in 2025.

**ISEAL Membership:** In October 2024, the ISEAL Board approved MAC as a Community Member. ISEAL is a global membership organization for credible sustainability standards. Membership in ISEAL is considered by some customers and other stakeholders as an important mark of credibility. For example, in the Mercedes-Benz *Guidance for Suppliers: Navigating Quality and Effectiveness of Mining and Supply Chain Standards*, which was first published in 2023, 3 of 33 overall points are attributed to standards that have ISEAL membership.

#### **Community of Interest Advisory Panel**

**Meetings:** In 2024, the Community of Interest Panel (COI Panel) held two hybrid meetings—one in Calgary and one in Ottawa—and several intersessional activities. The meeting in Calgary included post-verification review of Eldorado Gold and Canadian Natural Resources Limited. For more information on panel activities, please refer to the panel's [annual statement](#).

**Terms of Reference:** In June 2024, the MAC Board and COI Panel approved changes to the COI Panel [Terms of Reference](#) to formalize the long standing, but previously informal, co-decision-making role of the panel (alongside the MAC Board) on matters relating to TSM. The COI Panel also added a new category of membership for Customers of Mined Materials, which has been filled by two representatives from German automotive companies.

#### **International Activities**

**International Adoption:** In 2024, MAC engaged with governments and industry associations across the globe to support discussions around the adoption of TSM. The program was formally adopted by the Mongolian National Mining Association. MAC travelled to Mongolia in October 2024 to provide TSM training and implementation support. MAC continues to engage with several national mining associations that are considering adoption of TSM.

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