



The Mining Association of Canada
ADVOCACY STEWARDSHIP COLLABORATION

ANNUAL REPORT 2014



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Introduction

ABOUT THE MINING ASSOCIATION OF CANADA

THE MINING ASSOCIATION OF CANADA

The Mining Association of Canada (MAC) is the national organization of the Canadian mining industry. It comprises companies engaged in mineral exploration, mining, smelting, refining and semi-fabrication. Member companies account for the majority of Canada's output of metals and major industrial materials.

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.

Before it's ours, it's mined.

29 63.5
Cu
Copper

26 55.8
Fe
Iron

20 40.0
Ca
Calcium

mining.ca



MESSAGE FROM THE CHAIR AND THE PRESIDENT & CEO

Zoë Yujnovich, Chair of the Board of Directors, and Pierre Gratton, President & CEO

There is no doubt that the Canadian mining industry is experiencing a significant downturn. As an industry familiar with ups and downs, our miners are doing what they can to contain costs and prepare for the next eventual upswing. For its part, MAC has been continuing to advocate for good public policy—a prerequisite for responsible mining growth.

Despite the slump, it is important to note that our industry continues to make enormous contributions to Canadians' social and economic well-being. The mining and minerals processing industries directly employ some 380,000 people across Canada, including well over 10,000 Aboriginal Canadians. That's just direct jobs. Tens of thousands more work for the 3,400 companies in Canada that supply our sector with the goods and services mining projects and operations require, such as equipment, and financial, legal and environmental services. Beyond jobs, there are many other ways we contribute to Canada's economy. The mining industry invests over \$20 billion every year in new capital construction, and in machinery and equipment. Mining also accounts for almost 20% of Canadian goods exports, valued at nearly \$90 billion. The sector is also responsible for over half of railway shipping and around half of marine shipping.

Despite it being a challenging year, MAC and its members continued to achieve significant accomplishments throughout the year. For example, 2014 was MAC's busiest year on record in terms of its advocacy efforts—a reflection of the vast set of challenges and opportunities facing the sector. MAC was highly engaged with government officials and parliamentarians on a variety of issues that affect the industry's competitiveness, including the regulatory environment, taxation and fiscal regimes, trade and development, Aboriginal participation in mining, infrastructure, transportation, innovation and R&D, and skills training. Our annual advocacy day, *Mining Day on the Hill*, in November was the largest ever, with our mining delegates meeting with senior government and political officials throughout the National Capital Region to communicate the industry's needs to thrive and compete for global mining investment.

In 2014, MAC's advocacy efforts were highly focused on the regulatory regime for mining. Recent years have seen significant regulatory changes that impact the sector, including the federal government's current review of the *Metal Mining Effluent Regulations*, and major regulatory reform that began in 2012 that introduced a new *Canadian Environmental Assessment Act*, a new *Navigation Protection Act*, and changes to the *Fisheries Act*. Throughout 2014, MAC advocated for the mining industry's needs at the federal level for a reasonable, timely and efficient environmental assessment and permitting process, as well as federal-provincial coordination and a smooth implementation of the legislative changes. Although federal environmental assessments are much better managed today than they were five years ago, some uncertainties still need to be resolved before the reforms achieve their intended outcomes.

Beyond our borders, we continued to make great strides in international social responsibility in the mining sector. MAC and fellow members of the Resource Revenue Transparency Working Group saw their work in pushing for Canada's adoption of payment transparency legislation come to fruition with the tabling of the *Extractive Sector Transparency Measures Act*. This brings Canada in line with the global transparency effort to curb corruption in developing countries by arming communities with the financial information they need to hold their governments accountable for how they spend mining revenues. MAC was also instrumental in other areas of public policy that intend to advance the Canadian mining industry's contributions both at home and abroad, including Canada's new



Zoë Yujnovich
Chair, MAC Board of Directors
Vice President, Shell Canada



Pierre Gratton
President & CEO, MAC



Extractive Sector Trade Strategy and the enhanced CSR Strategy, which endorsed the Towards Sustainable Mining (TSM) initiative as a progressive CSR program.

The Canadian mining industry's growth depends on its ability to access emerging markets for its products. Recent international trade developments bode well for Canada's mining sector. In 2014, we commended the federal government for continuing its active trade agenda by concluding a Free Trade Agreement with South Korea—Canada's first with a south pacific country and an important market for Canadian mineral and metal products. The Canada-European Union Economic and Trade Agreement also reached a milestone in 2014 with the finalization of the agreement's text.

It's important to note, however, that trade starts at home. As such, an effective transportation system is essential to the Canadian mining industry's ability to move its products and get them to market. In 2014, MAC was closely involved in a number of important policy developments related to rail and marine shipping. On the rail front, the federal government put in motion a number of regulatory reforms that impact the Canadian mining industry. For example, Bill C-30, *The Fair Rail for Grain Farmers Act*, was enacted as a response to a back-log of shipments throughout the winter months. Unfortunately, the legislation prioritizes the grain sector over other industries, including the mining industry, which is the railways' largest industrial user. As spotty service continues to impact mining companies across the country, MAC remains highly engaged with federal government officials to communicate the industry's needs for a reliable rail system and will be actively participating in the 2015 Statutory Review of the *Canada Transportation Act*. On rail liability, the Government of Canada delivered on its commitment to make changes to the liability insurance regime following the Lac-Mégantic disaster. MAC was actively engaged in both rounds of consultation, which ultimately led the government to close a loophole that the railways were using to circumnavigate the common carrier obligation for shippers of certain dangerous goods.



PHOTO: SHELL CANADA, ATHABASCA OIL SANDS PROJECT, ALBERTA

On marine shipping, MAC closely monitored global policy developments from the International Maritime Organization that have changed the way ship garbage can be discharged, as well as changes to requirements for moisture management procedures. Thanks in large part to MAC's efforts, Canadian regulators are now aware of the challenges these developments pose to the Canadian mining industry, including potential disruptions to trade, and are working closely with the industry in the transition to the new regulations.

Much of MAC's work is also focused inwardly on fostering progress within the industry itself. This is because MAC and its members recognize that the industry's privilege to operate rests on continuous improvement in the way that we operate and communicate with our communities of interest. Through participation in TSM and through individual company actions, our members are adopting leading environmental practices and are engaging with communities throughout the mining life cycle. In 2014, TSM celebrated its 10-year anniversary, which means we now have a decade worth of results that demonstrate the program's success in driving performance improvement at mining operations across Canada and beyond. Adoption of TSM also continued to grow in 2014 as the Quebec Mining Association became the second provincial mining association to commit to implementing TSM for their members after the Mining Association of British Columbia, which adopted it in 2011.

In 2014, MAC's new Aboriginal Affairs Committee held its first full year of meetings. The committee examines ways in which the mining sector can enhance mutually-beneficial partnerships with Aboriginal communities, monitors policy developments, and serves as an important forum for MAC members to share best practices in

engagement with Aboriginal communities. The committee also provides funding to the Macdonald-Laurier Institute's multi-year research project, *Aboriginal Canada and the Natural Resource Economy*, which has resulted in a number of reports that explore the opportunities for greater Aboriginal participation in the mining industry.

Looking back at industry happenings of 2014, we would be remiss not to reflect on the unfortunate tailings failure at the Mount Polley mine in British Columbia, owned and operated by MAC member, Imperial Metals. We cannot express just how seriously this was taken by MAC, its members, and the wider industry. We share in the disappointment of our fellow Canadians that this occurred, and strive to work to restore the public's trust in how we manage our tailings facilities. While the breach was determined to be caused by a design flaw and not as a result of management oversight, MAC's Board of Directors proactively committed to review all of TSM's tailings management requirements and MAC's three tailings management guides. The goal of this work is to ensure that tailings failures like the one at Mount Polley never occur again. To this end, MAC's Board has struck an independent review of MAC's TSM Tailings Management Protocol and guides, with a report on potential improvements due at the end of 2015.

MAC's membership continued to grow in 2014 with the addition of Lundin Mining as a full member and two new associate members, Lawson Lundell LLP and Major Drilling Group International. Goldcorp, one of the world's largest gold mining companies, also decided at the end of 2014 to join MAC in 2015. MAC's membership is now at the highest level in its history, which is indicative of the industry's need to engage with Ottawa decision-makers to shape the national public policy environment to ensure the industry remains competitive on the world stage.

MAC's achievements in 2014 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 representatives who lend their expertise to MAC committees and working groups. We also boast one of the strongest association staffs in Ottawa, composed of individuals who are recognized for their expertise and professionalism by government and other associations. With their mix of skills, experience and teamwork, 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.



PHOTO: CAMECO CORPORATION, CIGAR LAKE MINE, SASKATCHEWAN

REPORT FROM THE CHAIR OF THE TOWARDS SUSTAINABLE MINING GOVERNANCE TEAM

Louise Grondin, Senior Vice President, Environment and Sustainable Development, Agnico Eagle Mines Limited

The Towards Sustainable Mining (TSM) Governance Team examines opportunities for improving the mining industry's performance and reputation with key stakeholders.

HIGHLIGHTS

- 2014 was the first year of reporting at the facility level for the two newest protocols, the TSM Biodiversity Conservation Management Protocol, and the TSM Safety and Health Protocol.
- Participation in TSM continued to grow, with 23 companies reporting facility-level performance in 2014 compared to 20 in 2013.
- MAC proactively initiated a review of its tailings management program immediately following the August 2014 tailings breach at the Mount Polley mine.
- The Quebec Mining Association became the second provincial mining association to formally adopt TSM.
- MAC has seen an increased interest in TSM from different organizations around the world. The Finnish Network for Sustainable Mining is working on implementing TSM for the industry in Finland.



Louise Grondin
Chair, TSM Governance Team
Senior Vice President, Agnico
Eagle Mines Limited

TSM PERFORMANCE IMPROVEMENTS

The 2014 report shows steady improvement in company results, and maintained the overall high performance levels achieved in 2013. Notable highlights include:

- In the area of Aboriginal and community outreach, results for effective engagement and dialogue with communities of interest remained strong with 82% of facilities reporting a Level A or higher. The percentage of facilities at a Level AAA—the highest ranking possible—for this indicator has increased from 13% in 2006 to 42% in 2012 and 48% in 2013.
- The number of facilities assessed at a Level A or higher for demonstrating commitment and executive-level accountability for managing biodiversity conservation nearly doubled year-over-year, increasing to 60% in 2013 from 33% in 2012.
- For energy use and GHG emissions, 85% of facilities reported a Level A or higher for implementing comprehensive tracking and reporting systems for internal and public reporting.
- Tailings management results remained strong in 2013 with 96% of facilities reporting they have implemented an operation, maintenance and surveillance manual that adheres to industry best practices—an increase of 4% from 2012. However, following the Mount Polley tailings breach, MAC has committed to reviewing TSM tailings management requirements and guidance documents to ensure they remain best practice.

TSM COMMUNICATIONS AND OUTREACH

MAC has continued to build on the work initiated in 2013 to produce new communications materials for TSM with the intent of building awareness and recognition for the initiative and communicating the results it has achieved in measuring performance improvement. In 2014, MAC launched a new video that discussed the value investors are seeing in TSM as they increasingly factor in social, environmental and governance issues in their decision-making processes. MAC also launched the inaugural TSM Environmental Excellence Award and TSM Community Engagement Award, which were presented at the CIM Awards Gala in May 2014. Between the two award



categories, 25 impressive nominations were received. As a result of adjudication by members of MAC's Community of Interest (COI) Advisory Panel, IAMGOLD's Essakane Mine was recognized with the TSM Community Engagement Award for its village market gardening initiative in Burkina Faso. Syncrude Canada was presented with the TSM Environmental Excellence Award for its innovative tailings reclamation project by building fen wetlands in Northern Alberta.

MAC continues to receive inquiries internationally regarding TSM. In November 2014, MAC participated in a green mining seminar in Finland to support the Finnish Network for Sustainable Mining as it continued to explore adopting TSM. Other Scandinavian countries, such as Norway and Sweden, have also expressed an interest in TSM. In December, at the invitation of the Canadian embassy and with support of First Quantum Minerals and Eldorado Gold Corporation, MAC participated in a mine safety summit in Turkey that included a presentation on the safety and health requirements of TSM. In October, MAC also presented on TSM at the Intergovernmental Forum on Mining, Minerals, Metals and Sustainable Development in Geneva.



(LEFT TO RIGHT) PIERRE GRATTON, MAC; PETER READ, SYNCRUDE CANADA; OUMAR TOGUYENI, IAMGOLD CORPORATION; AND VICTOR GOODMAN, MAC COI ADVISORY PANEL MEMBER

TSM TRAINING WORKSHOPS

In 2014, MAC continued to provide TSM training for its members. This included two TSM workshops for De Beers Canada in Yellowknife and Toronto during the summer months of 2014, and another for KGHM International in Sudbury in October.

In May, MAC partnered with the Mining Association of British Columbia to deliver two TSM training workshops in the province. The first session, which was held in Vancouver, provided participants with a high-level explanation of each of the six TSM protocols. The second session, held in Kamloops, focused exclusively on the tailings management and energy use and GHG emissions management protocols. Guest speakers from Teck Resources Limited and New Gold were invited to present case studies on their management systems in these two areas. MAC also hosted a workshop for the staff of the Quebec Mining Association in December to help the association with their implementation of TSM.

Throughout the year, in addition to general TSM self-assessment workshops, MAC also delivered protocol-specific workshops to provide in-depth information about its requirements—a first for MAC. In early November, a training webinar was delivered to staff responsible for implementing TSM at facilities across MAC's membership on the TSM Biodiversity Conservation Management Protocol. During this webinar, Cameco, First Quantum Minerals, IAMGOLD Corporation and Syncrude Canada presented on their biodiversity management systems and described how they align with TSM requirements. The webinar was recorded and was made available to anyone in the membership. As this method of training was determined to be a success, MAC will consider this format for future TSM training efforts. In fall 2014, MAC also hosted a certification workshop for 25 TSM Verification Service Providers (VSPs). The workshop updated VSPs on recent changes to the program, guidance on the application of the protocols and best practices in external verification.

COMMUNITY OF INTEREST (COI) ADVISORY PANEL

In 2014, the COI Panel held two meetings to discuss various issues relevant to the mining industry. The first meeting was held in March 2014 and, at the request of Panel members, included a presentation by Stephen

Walker, Vice Chairman of Investor & Treasury Services and Head of Global Credit at Royal Bank of Canada. Mr. Walker shared insights on the state of the mining industry from an investment perspective. The meeting included discussions on four topics: community development, the *Beyond Zero Harm Framework*, grievance mechanisms, and water. On community development, the Panel discussed good practices and challenges in understanding and working with communities. At the meeting, the Panel was presented with an update on the *Beyond Zero Harm Framework*, which was designed to collaboratively measure and report on community well-being. The Panel was also briefed and offered feedback on the development of a guidance document for site-level grievance mechanisms, which is being developed jointly between MAC's International Social Responsibility Committee and the Office of the CSR Counsellor. On the issue of water, the Panel advised MAC on how it should address water moving forward with an emphasis on community involvement.

The Panel's second meeting took place in September 2014 in Val d'Or, Quebec. The three-day meeting included a tour of Agnico Eagle's Goldex mine and tailings reclamation project, and the Canadian Malartic mine. The primary focus of the meeting was the Post-Verification Review (PVR) process for Barrick Gold Corporation and ArcelorMittal Mines Canada, which presented their 2013 TSM results. The Panel placed an emphasis on three areas for the PVR: tailings management, community engagement and the international application of TSM. During the meeting, the Panel also met with members of the local communities and First Nations to share thoughts about the mining industry's role in the communities' long-term vision.



PHOTO: AGNICO EAGLE MINES LIMITED, GOLDEX MINE, QUEBEC

TSM PROTOCOL CHANGES

PROTOCOL CONSISTENCY REVIEW

A sub-group of the TSM Initiative Leaders (ILs) initiated a review of all six TSM protocols to ensure that terminology and definitions are used consistently. This review will also include work on developing a new format for the protocols to streamline information.

SAFETY AND HEALTH

In 2014, a detailed review of the TSM Safety and Health Protocol was initiated to incorporate lessons learned from the first three years of its implementation. This process will continue into 2015 and will include an effort to better incorporate fatality prevention elements into the protocol.

WATER

The ILs began looking at whether and how water management could be incorporated into TSM. This process began by examining a new standard for water management systems developed by the Alliance for Water Stewardship (AWS) and by beginning the development of a Water Policy Framework. The AWS standard was built in a way that is consistent with the approach that was taken in the development of the current slate of TSM protocols. In an effort to better understand the details of the Alliance's standard, New Gold has volunteered to pilot test it at its New Afton mine and will provide updates to the ILs on how it is working. By the end of 2014, the ILs had completed a draft of the Water Policy Framework, which was largely based on recent work by the International Council on Mining and Metals. The framework will be reviewed by both the COI Panel and the TSM Governance Team in 2015.

PLANS FOR 2015

Reviewing TSM's tailings management components will be the single largest focus for TSM in 2015. This will include working with the COI Panel, supporting the Tailings Working Group in reviewing the tailings management guides, and potentially supporting an independent review of the TSM tailings requirements should the MAC Board of Directors decide to launch such a review.

Building on the work initiated last year, MAC will continue to discuss how it can incorporate water into TSM and will finalize its Water Policy Framework. Work will also continue to complete the consistency review of all the protocols to align definitions of frequently-used terms and streamline information. In the year ahead, MAC will also conduct a two-year review of the Crisis Management Guide.

Education and training on TSM will also remain a priority. MAC will continue to support the Quebec Mining Association and the Mining Association of British Columbia as they work on implementing TSM for their members. MAC will also work to enhance awareness of the various protocols by providing more protocol-specific training webinars, based on the successful session on biodiversity that was delivered in 2014. These webinars will feature case studies from members that have excelled in the relevant protocols.

In 2015, MAC will continue to respond to growing interest in TSM internationally. Specifically, supporting the potential adoption of TSM in Finland.



PHOTO: TECK RESOURCES LIMITED, GREENHILLS OPERATIONS,
BRITISH COLUMBIA



Committee Reports



ENVIRONMENT COMMITTEE

Chair: Marc Butler, Director of Regulatory Affairs, Sudbury Integrated Nickel Operations, Glencore Canada

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

HIGHLIGHTS

- Improved clarity and progress in interpretation of amendments to the *Fisheries Act* through engagement with Fisheries and Oceans Canada.
- Unproblematic coming into force of the *Navigation Protection Act* after a year of intensive work by MAC's Navigable Waters Task Force.
- Established well-organized and highly-effective task forces of MAC member experts to address specific challenges with the *Fisheries Act* and *Canadian Environmental Assessment Act* stemming from recent major regulatory reform.

In 2014, the Environment Committee met jointly with the MAC Science Committee in Ottawa in February, in Vancouver in June, and again in Ottawa in October. Committee meetings were augmented by post-meeting webinars and work by smaller task forces throughout the year. The Committee's work in 2014 continued to focus on the implementation of the major changes in federal legislation that began in 2012, and on the review of the *Metal Mining Effluent Regulations* (MMER). A description of the work on the MMER review is found in the report of the Science Committee.

Amendments to the *Fisheries Act* came into force in November 2013. Initial experience of mining projects indicated significant change from past practice than originally anticipated, and raised questions of interpretation and process. To address issues with the Act, the Committee formed a Fisheries Act Task Force, which engaged with officials from Fisheries and Oceans Canada (DFO) to work towards greater clarity and workable approaches. The Task Force met with officials in June and in September, with participation of both regional and Ottawa-based DFO staff. Several positive outcomes have resulted from this work. For example, a member of the Task Force was invited to participate in a meeting of DFO's Canadian Science Advisory Secretariat. The Task Force also developed a draft process map, which proved helpful in focusing discussion, in identifying key process steps requiring further clarification, and in communicating to other Committee members. One problem identified early in the discussion, namely the disagreement over wording in s35 of the Act and the un-amended wording of the MMER was resolved through an agreement between DFO and Environment Canada. However, as challenges remain with aspects of the *Fisheries Act*, the Task Force is expected to continue its work in 2015.

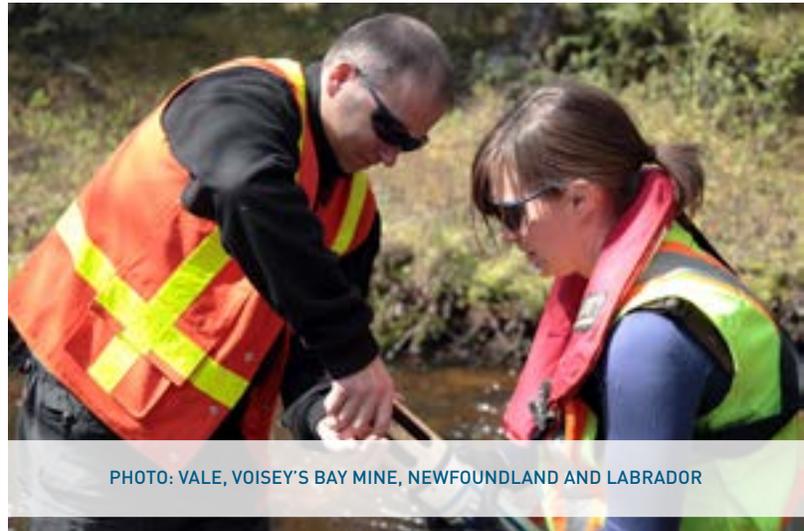


PHOTO: VALE, VOISEY'S BAY MINE, NEWFOUNDLAND AND LABRADOR

The *Navigation Protection Act* came into force in April 2014. The transition to the new Act was supported by policy guidance consistent with the intensive work in 2013 between MAC's Navigable Waters Task Force and Transport Canada, and resulted in a smooth transition without raising uncertainty.

The *Canadian Environmental Assessment Act* (CEAA 2012) includes new provisions, particularly enforceable decision statements. It also changes ways to coordinate with provincial processes. The impact of these new provisions



creates new challenges and uncertainties. At the same time, recent Recovery Strategies under the *Species at Risk Act* (SARA) have created new uncertainties for mining projects in the Boreal forest. The Committee's June meeting included a session with the Canadian Environmental Assessment Agency, the Canadian Wildlife Service, and the B.C. Ministry of Environment. The session explored experience to date with CEAA 2012, interaction between CEAA 2012 and SARA, and their interaction with provincial processes. The discussion highlighted important uncertainties and led to the creation of a MAC CEAA Task Force and a MAC SARA Task Force, which began work in late 2014.

Discussions with Environment Canada continued in 2014 on proposed Environmental Performance Agreements on air pollutants for base metal and iron ore pelletizing facilities.

MAC continued to monitor Canada's Chemicals Management Plan (CMP) under the *Canadian Environmental Protection Act* (CEPA). The second phase of CMP includes the assessment of cobalt, selenium, and boron and their compounds. The remaining metals will be assessed from 2016 to 2020. The Draft Screening Assessment Report for cobalt and its compounds was published in December and MAC coordinated a review of exposure aspects, as well as a proposed risk management scope document.

Health Canada is working to adjust Canada's Workplace Hazardous Materials Information System (WHMIS) to reflect the Globally Harmonized System of Classification and Labelling (GHS). Health Canada's goal is three-fold: 1) implement the GHS in Canada; 2) align GHS requirements with the United States; and 3) not reduce the current level of protection offered by the existing WHMIS regulations. During 2014, the *Hazardous Products Act* was updated, as part of Bill C-31. In August 2014, the *Hazardous Products Regulation* was published in Canada Gazette Part 1. MAC provided comments on this draft regulation, as well as engaged with Health Canada on the content. The implementation of the GHS in Canada will begin in 2015 and continue through to 2018.

To boost its effectiveness, MAC belongs to several formal and informal industry groups. They include the Industry Coordinating Group on CEPA, the Industry Steering Committee on Climate Change and Clean Air, the Environmental Health Industry Coordinating Group, the North American Metals Council and the International Council on Mining and Metals. Lyle Safronetz (Vale) represented MAC on the Industry Coordinating Group on CEPA, the Workplace Hazardous Materials Information System Current Issues Committee and the Transportation of Dangerous Goods General Policy Advisory Council. Justyna Laurie-Lean (MAC) was the representative on the Environmental Health Industry Coordinating Group and the North American Metals Council. Justyna is also the mining industry representative on the multi-stakeholder National Pollutant Release Inventory Work Group.

For more information on MAC's environmental initiatives and the reduction of releases from member facilities, please see the *Towards Sustainable Mining (TSM) Progress Report*, available on MAC's website (www.mining.ca).

ABORIGINAL AFFAIRS COMMITTEE

Chair: Bob Steane, Chief Operating Officer and Senior Vice President, Cameco Corporation

The Aboriginal Affairs Committee works to identify, evaluate and offer informed advice to the MAC Board of Directors on strategies to foster and strengthen the relationship between Aboriginal people and the mining industry in Canada.

HIGHLIGHTS

- Continued partnership with the Macdonald-Laurier Institute on its research project, *Aboriginal People and the Natural Resource Economy in Canada*.
- Participation in the Assembly of First Nations and Aboriginal Affairs and Northern Development Canada Working Group on Natural Resource Development.
- Outreach activities with Aboriginal groups and communities on opportunities in the mining sector.

The Aboriginal Affairs Committee (AAC) held three meetings during the year that included participation of invited guests, such as key government officials and stakeholders.

In 2014, the committee continued to work on a multi-year partnership with the Macdonald-Laurier Institute regarding its research project that proposes to lay out a pragmatic approach to ensure the full participation of Aboriginal Canadians in the natural resource economy. To date, nine position papers have been published by the Institute, including an analysis of the Tsilhqot'in decision that aligned with MAC's views.

ADVOCACY ACTIVITIES

MAC advocacy activities regarding Aboriginal affairs focused primarily on employment and skills training, as well as the Crown's duty to consult and, when appropriate, to accommodate. In April 2014, MAC appeared before the Standing Committee on Human Resources, Skills and Social Development and the Status of Persons with Disabilities to discuss Aboriginal employment opportunities in the mining sector and to advocate for the renewal and increased funding for Aboriginal skills training programs.

In 2014, MAC participated in the Assembly of First Nations and Aboriginal Affairs and Northern Development Canada Working Group on Natural Resource Development, and was involved in the group's policy development activities.

Throughout the year, the committee supported MAC's efforts regarding the federal government's proposed mandatory reporting requirements for extractive companies. Specifically, MAC successfully encouraged the federal government to delay the implementation of these rules with respect to payments made to Aboriginal groups until robust consultation with Aboriginal peoples had taken place.

OUTREACH ACTIVITIES

Throughout 2014, MAC participated in targeted outreach activities regarding Aboriginal participation in the mining sector, including attending the PDAC Convention's Aboriginal Program in March.

MAC also participated in a panel discussion on Aboriginal interests in natural resources development at Carleton University's School of Public Policy and Administration, as well as in a workshop hosted by the International Council on Mining and Metals on Indigenous Peoples and the mining sector.



PUBLIC AFFAIRS COMMITTEE

Chair: Tom Ormsby, Director, External and Corporate Affairs, De Beers Canada

The Public Affairs Committee provides advice and guidance on MAC's public affairs and communications programming.

HIGHLIGHTS

- Heightened level of advocacy to ensure the Canadian mining industry's competitiveness and to communicate its vast economic and social benefits to Canadians.
- Largest ever *Mining Day on the Hill* lobby day, themed "Mining for Canada's Future."
- Enhanced communications for the TSM initiative and greater recognition of member achievement through new TSM Awards for Community Engagement and Environmental Excellence.
- New ad campaign tying minerals and metals to items that characterize elections, such as ballots, campaign buses and debates, and ads that celebrate Canada's democracy with symbolic imagery of Parliament Hill.

FEDERAL ADVOCACY

Advocacy efforts in 2014, which involved active participation and consultation with the members of the Public Affairs Committee (PAC), Board of Directors, and other MAC members, predominantly focused on the regulatory and economic environment for mining. On regulatory issues, ongoing challenges related to the significant reform to the federal regulatory regime for mining remained a top priority. Advocacy efforts were also focused on other mining-related legislation, including the *Species at Risk Act* and the review of the *Metal Mining Effluent Regulations*.

With the industry experiencing a downturn throughout 2014, MAC focused its communications with policy makers on the importance of maintaining the Canadian mining industry's leadership and enhancing its ability to compete for highly-mobile global mining investment. This meant advocating for the following key issues:

- A positive fiscal regime and strategic tax incentives that would encourage growth for cost-intensive projects and enable the industry to cope with the current economic environment.
- Critical infrastructure, including roads, ports, and power generation, in remote and northern regions to make building and operating new mines possible.
- The free flow of trade and opening up the industry to new and emerging markets to sell its products.
- Government support to extend the benefits of Canadian mining abroad and to encourage best practices in corporate social responsibility both domestically and internationally.
- Resolution of transportation issues, particularly rail service which continues to be challenging for mining companies, as well as marine shipping.
- Greater participation of Aboriginal people in the mining sector through effective and meaningful consultation, ongoing engagement, and through economic and societal benefits like direct and indirect jobs, education and skills training, business development, and community investments.
- Continued investment in developing the next-generation of mining workers to address the future skills shortage.

Strategic outreach to Parliamentarians and members of their staff to communicate the mining industry's opportunities and challenges within Canada and abroad was a priority in 2014, surpassing efforts of previous years. Engagement involved sourcing input and participation from the PAC and other MAC members. Outreach targeted federal government officials in key departments and agencies relevant to mining, including the Canadian Environmental Assessment Agency, Natural Resources Canada, Fisheries and Oceans Canada, Environment Canada, Aboriginal Affairs and Northern Development Canada, Transport Canada, the Privy Council of Canada,



Employment and Social Development Canada, Finance Canada, and Foreign Affairs, Trade and Development Canada.

As an indication of the high degree of advocacy conducted throughout the year, MAC's President and CEO, Pierre Gratton, was once again listed by the *Hill Times* in its latest *Top 100 Lobbyists List* for 2014 activity. MAC's own lobbying records echo that 2014 was very active on the advocacy front with more than 150 meetings with senior bureaucrats and political stakeholders – a new record for MAC's lobbying activity.

MAC EVENTS

NATIONAL MINING WEEK

To mark the 18th annual National Mining Week, MAC partnered with Natural Resources Canada on the inaugural Mineral Outlook Dialogue Conference, which brought together senior government officials and industry representatives to discuss key policy areas related to innovation, infrastructure, community development, and corporate social responsibility. Plans are to make this conference an annual event. Following the conference, MAC hosted a networking reception that featured remarks from MP Kelly Block, Parliamentary Secretary for the Minister of Natural Resources, on the importance of Canada's mining industry to the nation's economy and how the Government of Canada is working to seize future growth opportunities. During the week, MAC also hosted a group of 50 local students at the Canadian Museum of Nature to encourage them to learn more about Canada's mineral resources and mining industry by touring the Vale Earth Gallery.



(LEFT TO RIGHT) PIERRE GRATTON, MAC; JOSÉE MÉTHOT, QMA; AND MINISTER LUC BLANCHETTE CELEBRATE THE QMA'S ADOPTION OF TSM IN JUNE 2014

ANNUAL GENERAL MEETING

During MAC's 2014 AGM in June, the Quebec Mining Association (QMA) announced its adoption of the Towards Sustainable Mining (TSM) initiative, becoming the second provincial mining association to do so after the Mining Association of British Columbia (MABC). Quebec's Minister Responsible for Mines, Luc Blanchette, addressed MAC's Board of Directors and was present during the announcement in Montreal on June 17, 2014. Minister Blanchette commended the QMA for its adoption of TSM, indicating that it will help make the province a world leader in sustainable mining. A milestone for the TSM initiative, the QMA and MABC's adoption of the program will help to expand its reach within Canada and recognizes its effectiveness as a mining standard that improves performance for critical environmental and social aspects of mining.

REGIONAL SPEAKING EVENTS

The PAC helps identify speaking opportunities, and supports MAC's events through their attendance, promotion and, at times, sponsorship. Throughout the year, MAC participated in several major mining conferences across Canada, including the PDAC Convention, CIM Convention and the Mineral Exploration Roundup. MAC's President and CEO, Pierre Gratton, also presented at several international events to highlight the Canadian mining industry, including Mining Indaba in South Africa and the Expomin conference in Chile.

In keynote addresses in September 2014 at the North American Mining Expo in Sudbury and at a Vancouver Board of Trade luncheon, Mr. Gratton spoke about the importance of Canada holding onto its leadership in mining, and stressed the areas that would benefit from further government action to enable the industry to thrive in an increasingly competitive global environment. In October, Mr. Gratton also participated in a panel discussion focused on financial transparency alongside Publish What You Pay Canada and the Global Organization for Parliamentarians Against Corruption, organized by the Empire Club in Toronto. The discussion focused on the importance of mining payment transparency in the global fight against corruption and highlighted the innovative collaboration of the Resource Revenue Transparency Working Group, comprised of MAC, the Prospectors & Developers Association of Canada, Publish What You Pay Canada and the Natural Resource Governance Institute.

MINING DAY ON THE HILL AND ANNUAL RECEPTION

MAC's annual *Mining Day on the Hill* lobby event was once again a highlight, and provided an excellent opportunity for MAC members to connect with Parliamentarians and senior-level government officials. It was the largest Mining Day to-date with 60 MAC member delegates from across the country participating in a record 68 meetings across the National Capital Region. This year's event was developed around the theme "Mining for Canada's Future" in recognition of the important role that responsible mining development can play as a powerful economic engine and a major employer.

For the Mining Day luncheon, MAC delegates and invited guests were joined by the Honourable Greg Rickford, Minister of Natural Resources, and the Honourable Ed Fast, Minister of International Trade. Minister Fast chose the event to announce the Government of Canada's Extractive Sector Trade Strategy, launched shortly after the government's release of the renewed CSR Strategy. At the luncheon, Roberta Jamieson, President and CEO of Indspire, also provided remarks calling on industry and government to continue supporting her organization's efforts in providing much-needed financial support for Aboriginal youth pursuing post-secondary education.

The Mining Day program concluded with MAC's annual reception at the Fairmont Château Laurier, which featured gem and mineral samples from the Canadian Museum of Nature's impressive collection. The reception was very well attended by Parliamentarians, political staffers and government officials.



THE HONOURABLE ED FAST, MINISTER OF INTERNATIONAL TRADE, ANNOUNCES THE EXTRACTIVE SECTOR TRADE STRATEGY AT MAC'S MINING DAY LUNCHEON IN NOVEMBER 2014.

ANNUAL OPINION POLLING ON CANADIAN ATTITUDES ON MINING

To monitor how Canadians are viewing our sector, MAC conducted its third annual public opinion poll in 2014. The PAC assisted MAC in updating the questions, and using the findings to inform MAC's activities and priorities in the year ahead. Results continued to show a largely positive view towards the industry, its vast economic and societal contributions to Canada, and its role in providing the building blocks of useful, modern products. Highlights include:

- 82% say they have a favourable view of Canadian-owned mining companies, up from 74% the previous year and the highest favourability to-date.
- 75% believe the industry is innovative, is changing for the better, and is a provider of good jobs.

- 76% expressed pride that Canada is the world's leading mining country, and 71% believe the government should help promote the mining sector.

COMMUNICATIONS SUPPORT FOR TSM

In recent years, the PAC has become more involved in providing support to MAC's TSM Initiative Leaders group to enhance the communication and promotion of the TSM initiative, which celebrated its 10-year anniversary in 2014. This collaboration resulted in several positive outcomes in 2014, including the establishment of TSM Awards for Environmental Excellence and Community Engagement, which celebrate innovative projects that raise the bar in environmental and social performance. At the CIM Awards Gala in May 2014, IAMGOLD Corporation was recognized with the TSM Community Engagement Award for its village market gardening initiative developed by its Essakane mine in Burkina Faso. Syncrude Canada won the TSM Excellence Award for its tailings reclamation project, the Sandhill Fen Research Watershed Initiative. CIM will continue to showcase the annual TSM Award winners each year during its May convention.

TSM Leadership Awards—the highest form of the TSM Performance Awards—were given out to three mining facilities in 2014 for their performance achievements in the TSM initiative: Glencore's Sudbury Integrated Nickel Operations, and Teck Resources' Cardinal River Operations and Trail Operations. This rare distinction celebrates a facility for achieving the highest performance levels (Level A or higher) across all of the six protocols and 23 indicators of TSM.

In 2014, MAC also released a new video, *TSM as a Tool for Investors*, to showcase the rise of socially-conscious investors. The video features Irene Sosa, Senior Analyst at Sustainalytics and Stephen Kibsey, Vice President of Risk Management at La Caisse de dépôt et placement du Québec, who discuss the growing trend of investors considering environmental, social and governance issues in their decision-making processes for mining investments, and why TSM is proving to be a valuable source of that information.



IAMGOLD CORPORATION'S AWARD-WINNING VILLAGE MARKET GARDENING INITIATIVE NEAR THE ESSAKANE MINE, BURKINA FASO

MEDIA AND SOCIAL MEDIA ENGAGEMENT

MAC continued to maintain a high level of proactive and reactive media engagement on mining-related news and issues. In 2014, MAC was quoted in approximately 250 media stories in outlets across the country and is regularly approached by media (national and regional outlets, political media, and trade publications) for comment on a wide range of topics. MAC's Twitter presence (@theminingstory) has also continued to increase, growing approximately 40% over the previous year. Tweet content includes factoids about the Canadian mining sector, and links to MAC and member company news. MAC's President and CEO, Pierre Gratton, is also on Twitter (@GrattonPierre).

In 2013-2014, MAC undertook a project to completely re-design its website (www.mining.ca) on new back-end infrastructure to make the site more user-friendly through enhanced web navigation and robust in terms of content offerings. The site was launched in early 2014.

PUBLICATIONS

Throughout the year, MAC issued seasonal newsletters to communicate new developments in the industry and positive news from MAC and its member companies. The newsletter is sent to Ottawa-based decision-makers in a

high-quality print format, and electronically to industry stakeholders across the country. The 2014 edition of our flagship publication, *Facts and Figures*, was launched in January 2014 in both print and electronic versions. Additionally, the 2014 edition of *TSM Progress Report* was published in September 2014. All publications are available on MAC's website (www.mining.ca).

CANADIAN MINING AD CAMPAIGN

In September 2014, MAC launched its latest advertising campaign, which ran in high-traffic areas around the National Capital Region and in national media outlets. With the upcoming federal election top-of-mind, the ads took on a political theme, tying minerals and metals to items that characterize elections, such as ballots, campaign buses and debates. Also introduced was a series of ads that celebrate Canada's democracy with symbolic imagery of Parliament Hill. While previous years' campaigns focused on mining's connection to modern and useful products, in 2014, MAC highlighted the role that minerals and metals play in the daily lives of Parliamentarians and leaders who serve the public in Canada. The campaign achieved more than 15 million ad impressions and generated more than 24,000 visits to MAC's website.

PAUL STOTHART MEMORIAL SCHOLARSHIP IN MINERAL ECONOMICS

In 2014, Brett Hannigan (University of British Columbia) was selected as the second annual recipient of the Paul Stothart Memorial Scholarship in Mineral Economics (\$3,500 value). Brett's exemplary academic achievements and his strong interest in the minerals sector, as evidenced by his volunteer record and work experience, impressed the scholarship's selection committee. He has acted as President of the Natural Resources Club at UBC and, in 2009, acted as an ambassador at the PDAC's Student Industry Mineral Exploration Workshop. He is a professional geoscientist and has worked in the sector in several geologist, environmental scientist and strategy roles since graduating from Simon Fraser University in 2009.

The scholarship was established in 2012 from the generosity of MAC member companies in memory of the late Paul Stothart, MAC's former Vice President of Economic Affairs, and is awarded annually. For eligibility and application requirements, please visit the MAC website (www.mining.ca).



SCIENCE COMMITTEE

Chair: Kent England, Manager, Environment and Licensing, Cameco Corporation

The primary focus of the Science Committee is the application of sound science and technology towards mitigating and/or minimizing the impacts of mining on aquatic and terrestrial ecosystems.

HIGHLIGHTS

- The MAC Science and Environment Committees continued to focus on the 10-year review of the *Metal Mining Effluent Regulations* (MMER). Science Committee members make up the majority of participants in the MMER Sub-Group processes.
- The Sandy Pond Alliance filed a Notice of Discontinuance with the Federal Court of Appeal, thus ending a four-year court challenge to Schedule 2 tailings facilities.
- The Canada Mining Innovation Council initiated a “Towards Zero Waste Mining” initiative during 2014 and advanced work to procure industry commitment to support Canadian mining innovation funding.

During 2014, the MAC Science Committee met jointly with the MAC Environment Committee in February, June and October to collaborate on issues related to the *Fisheries Act*, the *Metal Mining Effluent Regulations* and the Environmental Effects Monitoring Program.

METAL MINING EFFLUENT REGULATIONS (MMER)

The consultation process for the 10-year review of the MMER, initiated by Environment Canada (EC) in 2012, continued throughout 2013 and 2014. The review is focused on proposed amendments by EC that would include more stringent effluent limits, as well as add new substances to Schedule 4 of the regulations. The review may also amend the Environmental Effects Monitoring (EEM) program, including new substances for effluent characterization. It also proposes to make diamond and coal mines subject to the regulation, and require that all mine effluent be non-acutely lethal to *Daphnia magna*. The review process has included a Working Group and Sub-Groups dealing with EEM, Acute Lethality, Selenium, and New and Existing Substances.

Key documents supporting the review, and recommended by the Science and Environment Committees, included a study on Best Available Technology Economically Achievable (BATEA), commissioned by the Mine Environment Neutral Drainage Program, and two MAC-commissioned peer review studies on EEM data analysis. The results of the BATEA report influenced MAC’s response to EC-proposed amendments to MMER substance limits. The EEM studies came about following MAC’s two-year lobbying effort to acquire access to the National EEM database, through the *Access to Information and Privacy Act*, as well as focused advocacy during Mining Day on the Hill. The studies responded to EC’s position in the MMER review that all mines are having detrimental effects on fish and fish habitat. Both MAC studies demonstrated flaws in the department’s methodology and interpretation, and emphasized the need for accurate, science-based outcomes for the regulatory review. Members of the Science Committee also participated directly in the MMER Selenium Sub-Group, which worked towards developing a workable regulatory approach to selenium. As Sub-Group co-chair, MAC organized several presentations featuring experts and case studies that led to EC to



PHOTO: AGNICO EAGLE MINES LIMITED, MEADOWBANK MINE, NUNAVUT



accept that a tiered, site-specific approach that acknowledges that the fate, effects and assessment of selenium in the food chain are essential components for selenium regulation.

In late 2014, MAC established a MMR Task Force, comprising members of the MAC Board of Directors, which focused on developing desired outcomes from the review. This initiative was in response to EC's indication that it was willing to consider a proposal from industry on the various components of the MMR review. Guided by the Task Force, MAC submitted a letter to the Minister of Environment in November 2014 that detailed MAC's position on the proposed amendments, followed by advocacy meetings during Mining Day on the Hill later that month.

SANDY POND FEDERAL COURT CHALLENGE

On July 7, 2014 the legal counsel for the Sandy Pond Alliance for the Protection of Canadian Waters, an ENGO group that challenged the federal government's authority to designate Schedule 2 tailings impoundment areas under the MMR, filed a notice of discontinuance with the Federal Court of Appeal. The group brought the court challenge forward in June 2010, and subsequently, MAC, the Mining Association of British Columbia and Vale were granted intervener status in this case. The Federal Court dismissed the application in October 2013, followed by the ENGO group's appeal in December 2013. The discontinuance brought this case to a close after four years of legal interaction supported by MAC and its co-interveners.

CANADA MINING INNOVATION COUNCIL (CMIC)

As a supporting member of CMIC, MAC participates as a member of its Board of Directors, Governance Committee, and Environmental Stewardship Committee. CMIC's prime objective is to develop and implement strategies for investment in mining innovation and R&D in Canada. The Council takes a comprehensive focus on the mining life cycle and, in 2014, began instigating an overarching strategy towards "Zero Waste" mining. MAC works with CMIC to facilitate advocacy meetings with senior levels of government. In June 2014, MAC organized a meeting with the Deputy Minister of Natural Resources Canada and CMIC to review possible approaches to joint industry-government funding for mining innovation. Subsequently, CMIC initiated a drive to garner direct funding support from senior Canadian mining companies, with the objective of procuring matched funding from the federal government. This initiative is continuing into 2015.

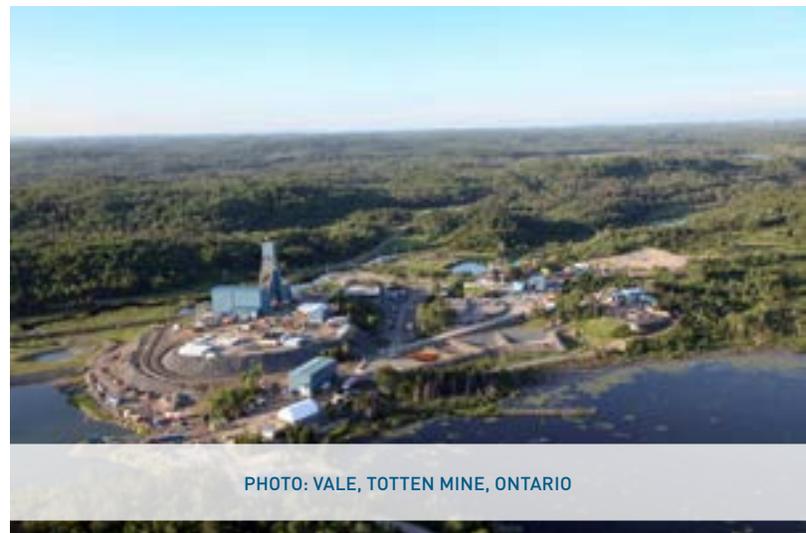


PHOTO: VALE, TOTTEN MINE, ONTARIO

NATIONAL ORPHANED AND ABANDONED MINES INITIATIVE (NOAMI)

NOAMI works towards supporting policy development to eliminate future mine abandonment, and improved mine closure and remediation. NOAMI also provides education and engagement opportunities for Aboriginal communities. MAC supports NOAMI as a member of its Advisory Committee, and provides administration and financial support. Secretariat support is housed at CANMET, part of Natural Resources Canada. NOAMI is also supported by other national, provincial and territorial mining associations. During 2014, NOAMI continued work on a national abandoned mines inventory project. This project will provide web-portal access to all Canadian mining jurisdictions, allowing them to update individual site information within their regions.

CANADIAN ECOTOXICOLOGY WORKSHOP (CEW)

MAC is a member of the CEW's (formerly the Aquatic Toxicity Workshop) Advisory Committee, which held its annual workshop in September in 2014. The workshop featured a full-day session, organized by MAC, on studies related to mining operations. The session included presentations related to the MMER review, including EEM studies, data analysis and investigation of cause, and were delivered by members of the MAC Science Committee.

MINE ENVIRONMENT NEUTRAL DRAINAGE PROGRAM (MEND)

Since its establishment in 1989, the MEND program has served as a credible driver of research to enhance understanding of acidic drainage and its prevention. It has accomplished this through a strong focus on innovative, peer-reviewed research driven by a multi-stakeholder steering committee that has maintained two objectives: increasing information and technology transfer. By focusing on technologies that meet Canadian needs within an international context, the MEND program attempts to reduce these costs to both existing and future operations. MEND has made great progress in addressing research priorities identified by the Canadian mining industry, civil society, and federal, provincial and territorial governments. The annual funds that MAC provides act as seed capital to fund research proposals. All funds contributed by MAC are matched or exceeded by monies and/or in-kind contributions from other organizations, including companies, consultants, universities and government departments.

In 2014, MEND's single focus was to support the 10-year review of the MMER. Following MAC's recommendation, MEND commissioned HATCH to conduct a detailed survey of mines operating across Canada to identify treatment technologies that are currently being employed. The study was completed in 2014 and provided useful information to move the MMER process forward. MEND also provided funding for a number of NGOs to come together to commission a third-party review of EC's second national assessment of the MMER environmental effects data.



PHOTO: HUBBAY MINERALS, LALOR MINE, MANITOBA

TAILINGS WORKING GROUP

Chair: Michael Davies, Vice President, Environment, Teck Resources Limited

The Tailings Working Group (TWG) reviews the management of tailings and mine waste to develop industry guidelines for the safe and environmentally-responsible operation of tailings and water management facilities. It also promotes effective facility management and risk assessment at MAC member facilities and throughout the broader mining industry. The TWG contributes to MAC's Towards Sustainable Mining (TSM) initiative, specifically with the development and implementation of the TSM Tailings Management Protocol, and with joint delivery of tailings management workshops.

HIGHLIGHTS

- Following the tailings dam failure at the Mount Polley mine in British Columbia, the TWG met to determine whether revisions were required for MAC's tailings management requirements and guidance.
- MAC and MABC members jointly agreed that a proactive and comprehensive review of MAC's tailings management guides and TSM Tailings Management Protocol was warranted to ensure they continue to contribute to the effective management of tailings facilities.
- MAC staff and TWG members delivered tailings management workshops throughout the year to encourage best practices in the safe operation and management of tailings facilities.

The August 4, 2014 tailings dam failure at the Mount Polley mine in British Columbia, owned and operated by Imperial Metals Corporation, created significant concern among the industry, regulators and the public regarding the management and operation of tailings facilities. Following the incident, the TWG held a teleconference in September to discuss the implications for MAC's tailings management initiatives. This was followed up by a joint workshop with MAC and MABC in November where participants agreed that a comprehensive review of MAC's three tailings management guides and TSM Tailings Management Protocol was warranted to ensure they were as effective as possible in preventing tailings failures. This proactive action was taken well before the cause of the breach became known and speaks to the industry's commitment to dam safety. Work related to the review commenced in late 2014 and will continue throughout 2015. Areas of focus could include updating the existing tailings management framework, adding technical components to the guides, incorporating risk management and mandatory emergency preparedness plans, and ensuring consistent requirements for the audit and assessment of tailings facilities.

MAC staff and volunteers from the TWG continued to deliver workshops throughout 2014 to promote the use of MAC's tailings management guides. Several were delivered at industry events, and others were customized workshops for member operations. In May 2014, MAC delivered joint TSM-tailings workshops with MABC in Kamloops and Vancouver. The Kamloops workshop included presentations by representatives from Teck Resources Limited (Highland Valley Copper) and New Gold (New Afton). MAC also presented a comprehensive tailings management workshop in Saskatoon in October 2014 at the Saskatchewan Mining Association's Environmental Forum. The workshop provided an overview of the MAC guides and included tailings operations case studies by HudBay Minerals and Cameco Corporation. Attendance at this workshop was unprecedented, with more than 100 participants. As a result of the ongoing training workshops, TSM performance scores in tailings management have improved markedly in recent years.

In 2014, MAC and the TWG also engaged with the Canadian Dam Association (CDA) on the application of the CDA's Mining Dams Safety Guidelines initiative.

Copies of MAC's tailings management guides in English, French and Spanish are available on the MAC website (www.mining.ca).



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

HIGHLIGHTS

- Provided input to the federal budget through pre-budget submissions, mines ministers briefings and other activities.
- Advocated for changes to the federal government's Foreign Affiliate Dumping Measures and achieved measurable success.
- Made significant progress on a quantitative study assessing the cost differential between remote and northern and centrally-located mining projects, and the economic implications that result.

FEDERAL BUDGET 2014

Finance Minister Jim Flaherty tabled Budget 2014 on February 11, 2014. It was the ninth budget tabled by the Conservative government. With the government seeking to rebalance its books, the budget did not contain much new spending, and forecast a return to surplus in fiscal year 2015-2016.

Additionally, the 15% Mineral Exploration Tax Credit was renewed for another year – an important tax incentive for the junior exploration sector.

FOREIGN AFFILIATE DUMPING RULES

Over the last two years of persistent advocacy, MAC, with engagement from Vale, Glencore, Rio Tinto and Ernst & Young, succeeded in achieving a number of significant technical amendments to the Foreign Affiliate Dumping (FAD) rules. In 2014, this included the introduction of provisions enabling the conversion of debt into equity, continuity rules for Paid Up Capital (PUC) reinstatement, and more measured compliance rules, among others. The amendments MAC has obtained through its advocacy efforts have resulted in a more manageable set of tax rules that initially, upon first tabling in October 2012, presented serious challenges to Canada's tax competitiveness. These measures threatened Canada's attractiveness as a destination for global mining investment and as a locale for junior mining companies to headquarter.

REMOTE AND NORTHERN TAX STUDY

Remote and northern projects are not on a level playing field with more centrally-located mining projects. Given the infrastructure deficit and the vastness of these regions' geography, there is a significant increase in costs to discover, develop and then operate mines when projects are compared to southern Canada. Simultaneously, the future of the Canadian mining industry increasingly lies in remote and northern regions. The federal government must recognize that the operational reality of mining on the ground is changing, and assess how mining policy can change in step with it. The opportunity for Canada is great, but a failure to capitalize on it strategically will see mineral investment depart for more competitive international jurisdictions.

Natural Resources Canada officials agreed to work collaboratively with industry on a study that explores the tax landscape and operational nature of mining in remote and northern Canada. Industry partners of the project include MAC, the Prospectors & Developers Association of Canada, the NWT & Nunavut Chamber of Mines, the Yukon Chamber of Mines, and the Association of Consulting Engineers of Canada. The study seeks to identify the cost differential between remote and northern and more centrally-located mining projects, and the economic implications that result from this difference. By quantifying the cost of developing and operating mines in remote and northern Canada, the study will identify how much it costs for miners to overcome Canadian geography, and will make policy recommendations to support responsible resource development in these regions.

TRANSPORTATION COMMITTEE

Chair: Vacant

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.

HIGHLIGHTS

- The Statutory Review of the *Canada Transportation Act* was launched.
- MAC actively engaged with Transport Canada and the International Maritime Organization on marine shipping developments that impact the Canadian mining industry, including MARPOL Annex V regulations and moisture management procedures.
- Bill C-52, *The Safe and Accountable Rail Act*, was tabled and Bill C-30, *The Fair Rail for Grain Farmers Act*, became law.

Each year, Canadian exports of aluminum, gold, nickel, copper, zinc, iron ore, coal, uranium, potash and diamonds amount to tens of billions of dollars. In 2013, for example, total Canadian mineral export value reached \$87 billion, accounting for approximately 20% of Canada's total exports. These mineral and metal products account for much of the volume handled at Canadian ports, and around half of total rail freight volume and revenue generated by Canadian railways.

A low-cost, effective and reliable system of marine, rail and truck transportation is essential to the Canadian mining industry's international competitiveness. Given that trade starts at home, it is also key to enabling the industry to take advantage of many trade agreements the government has negotiated. This is especially important as Canada must overcome its vast geography to compete against other countries that have significantly shorter logistical supply chains.

RAIL

Rail freight transportation has been challenging on several fronts. In the last two years, rail service, safety and liability challenges and events have been the subject of significant national media attention and the object of public concern. This has included the Lac-Mégantic disaster in July 2013, the back-log of shipments throughout the winter of 2014, and other long-standing rail service issues faced by many sectors, including the mining industry. These challenges have led the federal government to undertake large-scale reforms through three pieces of legislation and associated regulations. To ensure these reforms take into consideration the needs and priorities of the mining industry, MAC was actively engaged in each consultation and legislative process. MAC is also engaged in the government's 2015 Statutory Review of the *Canada Transportation Act*, which remains ongoing.

BILL C-30, THE FAIR RAIL FOR GRAIN FARMERS ACT

Bill C-30, *The Fair Rail for Grain Farmers Act*, was enacted in response to protracted service failures spanning late 2013 and early 2014. While these failures were experienced by all shippers, much of the attention was focused almost exclusively on the grain sector. This is in large part because the railways attributed the service failures to an exceptionally harsh winter that caused trains to travel more slowly with fewer cars in tow. The railways also pointed



PHOTO: IRON ORE COMPANY OF CANADA, QNS&L RAILWAY



to the bumper crop of grain that had to be moved, indicating that it placed greater demand for rail resources at a time when rail capacity was limited.

As political pressure mounted amid persisting service failures, the federal government enacted, without consultation, grain sector-specific volume commitments at the expense of all other industrial groups, including mining. The government also introduced expanded interswitching provisions from 30 kilometres to 160 kilometres across the Prairies – still out of range for all mining companies. MAC appeared at committee during the legislative process and recommended key amendments to the legislation, but these were not accepted. The bill became law in May 2014.

BILL C-52, THE SAFE AND ACCOUNTABLE RAIL ACT

Bill C-52, *The Safe and Accountable Rail Act*, delivers on an October 2013 Throne Speech commitment, in response to the Lac-Mégantic disaster, to require shippers and railways to carry additional insurance for the movement of dangerous goods. The government's goal in pursuing legislative change was to strengthen the third-party railway liability insurance regime to reduce taxpayers' exposure to financial damages from future rail accidents. MAC was actively engaged in both rounds of legislative consultation, producing two submissions, and participated in meetings with officials. The bill, tabled in February 2015, is largely consistent with the principles underscored in MAC's submissions, and closes a loophole (tariff 8) the railways were using to circumnavigate the common carrier obligation for shippers of certain dangerous goods. The closure of this loophole was a significant MAC request. The bill is expected to pass without amendment.



PHOTO: IRON ORE COMPANY OF CANADA, QNS&L RAILWAY

THE 2015 STATUTORY REVIEW OF THE CANADA TRANSPORTATION ACT

The 2015 Statutory Review of the *Canada Transportation Act* was launched early, in June 2014, as part of the government's response to the rail service failures of late 2013 and early 2014. To date, MAC has met with the Secretariat, prepared a submission to the review panel, and will be engaging with panel representatives to discuss the Canadian mining industry's priorities for the review.

MARINE

MAC's engagement on marine shipping issues has focused increasingly on international policy and regulatory developments from the International Maritime Organization, and the subsequent implementation of these measures domestically into Canadian laws and regulations. Working in partnership with the International Council on Mining and Metals (ICMM) and key domestic stakeholders, MAC focused on domestic and international developments on the implementation of MARPOL Annex V, amendments to the International Maritime Solid Bulk Cargoes Code, and new requirements with respect to product moisture testing and management procedures.

INTERNATIONAL MARITIME ORGANIZATION (IMO)

The IMO is the United Nations' special agency responsible for the global safety and security of shipping and the prevention of marine pollution by ships. Recent changes to MARPOL Annex V, which aim to prevent pollution in the marine environment, have raised important questions about impacts to the trade and shipment of certain mining products. As ores and concentrates were largely exempt from earlier programs such as the European Union's REACH (Restriction, Evaluation, Authorisation and Restriction of Chemicals), the IMO has emerged as the

global regulator for chemical management of mining products. The mining industry has worked hard to develop a common voice to ensure proportional regulations based on sound science.

MARPOL ANNEX V

MARPOL is short for the International Convention for the Prevention of Pollution from Ships. Annex V is specifically focused on the treatment of ship garbage. Cargo residues, according to MARPOL, are a form of garbage and are dealt with in Annex V. Recently, amendments to Annex V created a new set of criteria determining that certain cargo residues are no longer allowed to be discharged into the sea as of January 1, 2013. Instead, dry residues and/or wash water containing residues meeting any of the criteria will have to be discharged at port reception facilities, thus potentially hampering trade and complicating the shipping element of the logistics supply chain.

MAC and several of its members have been active on this file, engaging with Transport Canada regulators, and providing industry views during the development of Canada's position on this topic and related issues. This engagement has been accomplished through a variety of ways, including a multi-stakeholder workshop hosted at the CANMET Laboratories and MAC's participation at an IMO workshop in London hosted by ICMM. MAC also completed a white paper addressing key issues for the domestic implementation of MARPOL, and was instrumental in organizing a Canada/US bi-lateral meeting to build consensus on key issues.

In September 2014, the reporting of an IMO Correspondence Group – in which MAC was engaged in – resulted in the advancement of recommendations with respect to the development of cargo lists of products in light of the new Annex V criteria. It also highlighted the need for the IMO to develop further guidance on the classification of cargoes based on the UN Globally Harmonised System. These recommendations – seen to reflect industry's concerns and views on the issues – were made by the Carriage of Cargoes and Containers (CCC) Subcommittee to the Marine Environment Protection Committee (MEPC). While industry has participated in much discussion with and has gained support from many members of the CCC, the MEPC is the parent body and will make the final decisions. The next MEPC meeting is in May 2015.

INTERNATIONAL MARITIME SOLID BULK CARGOES CODE (IMSBC CODE)

Beyond MARPOL Annex V, MAC members have been engaged domestically with Transport Canada on the issue of certifying the adequacy of existing moisture management processes and testing procedures for cargoes destined for marine transport. IMO regulations, to which affected Canadian shippers of certain commodities must comply, came into force on January 1, 2015. Transport Canada, as the seat of the Canadian Secretariat to the IMO, is tasked with making the approvals. After having secured a temporary approval process for affected members in December 2014, enabling miners to continue shipping their products after January 1, 2015 until full compliance is assured, MAC will remain engaged with Transport Canada officials on issues of scope and adequacy of processes. To date, a productive workshop with officials and stakeholders was convened, and work in this area remains ongoing.

INTERNATIONAL SOCIAL RESPONSIBILITY COMMITTEE

Chair: Alanna Heath, Vice President, Government Affairs, Barrick Gold Corporation

The MAC International Social Responsibility (ISR) Committee's mandate is to review international issues that affect the interests of the members, identify emerging issues, set priorities, develop policy advice for the MAC Board and develop strategies to address those emerging issues.

HIGHLIGHTS

- The Resource Revenue Transparency Working Group (RRTWG) published its framework for the mandatory disclosure of payments to governments derived from mining activities with the endorsement of all four participating organizations.
- The federal government passed the *Extractive Sector Transparency Measures Act* creating a mandatory disclosure reporting obligation based largely on the RRTWG framework.
- The ISR Committee completed a draft guide to address common implementation challenges with site-level grievance mechanisms.
- The federal government announced its enhanced CSR Strategy, *Doing Business the Canadian Way: A Strategy to Advance Corporate Social Responsibility in Canada's Extractive Sector Abroad*, which includes an endorsement of the Towards Sustainable Mining (TSM) initiative. MAC continues to support the strategy's implementation in several ways, including co-chairing the Centre for Excellence on CSR.
- The ISR Committee undertook a successful introductory dialogue with Canadian faith-based organizations to re-establish lines of communication and seek further opportunities for future engagement.

STRATEGIC PLAN

In 2014, MAC's ISR Committee began working under a new strategic plan to help guide its activities for the next two to three years. As part of this process, the committee developed a vision statement that guides the entire plan, which is as follows:

Through the work of the ISR committee, MAC is recognized as:

- *An excellent and credible source of policy, guidance and practices on emerging issues to drive performance and proactively demonstrate leadership.*
- *A bridge for collaboration across players and initiatives.*

This will deliver credibility to the mining industry and deeper/stronger relationships with stakeholders. To achieve the vision presented above, the ISR Committee developed the following five strategic objectives:

1. Leadership in Human Rights
2. Monitoring and Exploring Emerging Issues
3. Government Engagement
4. Strategic Civil Society Engagement
5. Improved International Social Responsibility Performance

As the committee looks to pursue new projects and set future work plans, these objectives will act as a guide to focus priorities.

EXTRACTIVE SECTOR TRANSPARENCY MEASURES ACT

In 2012, MAC began a partnership with Publish What You Pay-Canada, the Natural Resources Governance Institute (formerly the Revenue Watch Institute) and the Prospectors & Developers Association of Canada (PDAC) with the



goal of developing recommendations that would inform the development of a regime for the mandatory disclosure of payments made to governments derived from mining activities.

Known as the Resource Revenue Transparency Working Group (RRTWG), the members have worked towards a common goal of assisting in the effort towards establishing greater transparency in the mining industry in Canada and overseas. The intent is to ultimately provide communities with the financial information they need to hold their governments accountable for the use of mining revenues. The initiative involved high levels of collaboration and consultation with stakeholders over a period of a year and a half. The structure of the working group provided a platform for industry and civil society to build a mandatory disclosure framework that reflected the needs and perspectives of both parties.

The RRTWG's final framework was completed and endorsed by the four participating organizations, and formally announced in January 2014. A second milestone was reached in November 2014 when the federal government tabled the *Extractive Sector Transparency Measures Act*. The Act received royal assent a month later. The next stage will be for industry and civil society representatives to work with Natural Resources Canada (NRCan) to develop guidance to support the implementation of the Act. It is expected that the Act will come into force in June 2015 to meet a commitment made by the Prime Minister in June 2013 to have this regime in place within two years.



PHOTO: BARRICK GOLD CORPORATION, PASCUA-LAMA MINE, CHILE

For the most part, the Act aligns very closely with the RRTWG framework; however, there are a few points of contention that will need to be addressed through the guidance process and possible future amendments. These include issues related to the way in which joint ventures are addressed and how the Act determines who has control of a project for the purposes of triggering the reporting obligation. There are also concerns related to the enforcement provisions linked to the potential severity of fines and penalties for minor errors and omissions, as well as the level of rigour required by the assurance and attestation requirements that are significantly more onerous than other financial audit requirements.

In addition, the federal government went beyond the scope of the RRTWG recommendations to include payments to Aboriginal governments, thus raising additional issues requiring further consideration. However, the federal government delayed the implementation of this provision for two years after the Act comes into force to allow for further consultation with Aboriginal governments and organizations. The ISR Committee will continue to work with NRCan and other relevant government departments to achieve an orderly and practical implementation of this Act. It will continue to be a priority for the committee to ensure equivalency provisions are used appropriately to align with reporting obligations in other jurisdictions such as the United Kingdom.

HUMAN RIGHTS – REMEDY AND SITE-LEVEL GRIEVANCE MECHANISMS

In early 2014, the ISR Committee commissioned Dr. Craig Ford to develop a guide that would help companies overcome common implementation challenges related to site-level grievance mechanisms at the mine site and community levels. The idea for this project stemmed from a workshop jointly hosted by the committee and the CSR Counsellor in late 2013. While MAC already contributes to the body of practice in community response mechanisms through the TSM Aboriginal and Community Outreach Protocol, it was felt that MAC could further contribute by documenting the combined experience of members and experts in the areas of:

- Challenges with building awareness of the mechanism and trust in communities.

- Challenges with securing internal buy-in at the site level from the people that engage with the community and from other key departments.
- Challenges with gaining consistency of practice across a diverse range of sites.

A draft of the guide was completed by the end of 2014 and was reviewed by several leading experts on dispute resolution, including: Lloyd Lipsett, a notable human rights lawyer; Dr. Deanna Kemp, Deputy Director at the Centre for Social Responsibility in Mining; David Kovick, Senior Advisor at SHIFT; and Luc Zandvliet, Senior Associate at SHIFT. The guide will be finalized and presented to the MAC Board of Directors for approval and publication in 2015.

The intent of the guide is to help companies that are struggling with implementing functional site-level grievance mechanisms. It will also complement a number of existing guidance documents that address the design elements of grievance mechanisms. With this project, MAC takes an additional step forward in its efforts to identify CSR challenges and contribute to solutions. The guide will underscore the importance of dispute resolution at an early stage and at the community level, and will help companies build effective site and community level grievance mechanisms.

OECD STAKEHOLDER ENGAGEMENT DUE DILIGENCE PROJECT

Since 2013, MAC has been working with industry and civil society representatives on the development of an OECD guide focused on due diligence in stakeholder engagement as it applies to extractive industries. This project is sponsored jointly by Canada and Norway, and was accepted as part of the OECD Proactive Agenda that covers topics relevant to mining, including work on artisanal and small-scale mining, conflict minerals and profit shifting (transfer pricing). To guide this project, the OECD formed a multi-stakeholder advisory group, co-chaired by Canada and Norway, in June 2013. At the request of the Government of Canada, MAC joined other associations on this advisory group, such as the International Council on Mining and Metals (ICMM) and the World Gold Council, to ensure the guide is useful for industry. MAC's value to the project is its expertise derived from the TSM initiative which, through the Aboriginal and Community Outreach Protocol, has established a useful, site-level tool for due diligence on engagement systems.

During 2014, the Advisory Group helped develop and reviewed drafts of the guide, which was prepared by a consultant hired by the OECD. The OECD is expected to release a draft for public review in the first half of 2015.

CANADA'S EXTRACTIVE SECTOR TRADE AND CSR STRATEGIES

In late 2013 and early 2014, the ISR Committee developed a series of policy recommendations intended to strengthen the federal government's CSR Strategy. These recommendations were submitted as part of a five-year review of the strategy launched by the Minister of International Trade. Among other things, these recommendations included the desire to see strengthened roles for the Office of the Extractive Sector CSR Counsellor and the OECD National Contact Point, including consequences for companies that choose not to participate in these processes.

In November 2014, the federal government launched two strategies to support Canadian mining abroad, the new *Extractive Sector Trade Strategy* and the enhanced CSR Strategy, *Doing Business the Canadian Way: A Strategy to Advance Corporate Social Responsibility in Canada's Extractive Sector Abroad*. The trade strategy builds an extractive-specific element into the *Global Markets Action Plan*, which was announced by the federal government in 2013, and focuses on removing barriers through the negotiation of trade agreements. It also focuses on increasing the knowledge of the trade commissioner network to better connect Canadian companies with opportunities in other countries and positioning Canada as a partner of choice for Canadian direct investment abroad.

The enhanced CSR Strategy, largely based on the recommendations developed by the ISR Committee, sets expectations of companies to adhere to international standards regarding social and environmental practices. It also strengthens and coordinates Canada's international dispute resolution mechanisms, the Extractive Sector CSR Counsellor and the OECD National Contact Point. This new coordination creates a front-end screening role for

the CSR Counsellor and establishes the National Contact Point as the mechanism for mediation. Also noteworthy, in addition to adding new CSR standards such as the United Nations' Guiding Principles on Business and Human Rights, the strategy includes an endorsement of MAC's TSM Initiative.

Taken together, these two strategies send a welcome signal that Canada supports and promotes a strong and vibrant Canadian mining sector both at home and abroad. The Government of Canada is also setting a high bar for corporate responsibility performance and furthering Canada's position as a global leader in the extractive sector.

PLANS FOR 2015

The ISR Committee has identified a number of priorities as it implements its new strategic plan in the year ahead. Highlights of these priorities include:

LEADERSHIP IN HUMAN RIGHTS

- Finalize and publish the guide, *Practical Design and Implementation Guide for Site-Level Grievance and Community Response Mechanisms in the Resource Development Industry*.
- Continue to engage with the OECD to ensure its Stakeholder Engagement Due Diligence project adds value to the mining sector and communities.

MONITORING AND EXPLORING EMERGING ISSUES

- Develop a Canadian version of the World Gold Council's *Value Distribution Report*, which provides country-level data on the amount of money spent by mining companies that remains in the host country.
- Develop a work plan to address issues related to transfer pricing that are being raised by Canadian civil society organizations.

GOVERNMENT ENGAGEMENT

- Continue to engage with the Canadian International Resource and Development Institute (CIRDI), formerly called the Canadian International Institute for Extractive Industries and Development, to help ensure its successful implementation.
- Engage with the Government of Canada to support the successful implementation of Canada's enhanced CSR Strategy.
- Work with Natural Resources Canada to develop guidance for the implementation of the *Extractive Sector Transparency Measures Act*.
- Continue to build on efforts to work more closely with the Government of Canada on its presence at the Mining Indaba in South Africa.

STRATEGIC CIVIL SOCIETY ENGAGEMENT

- MAC will formally join the Devonshire Initiative and become a more active participant in the Initiative's work.
- Build on dialogue efforts with Canadian faith-based organizations, and explore opportunities to connect domestic initiatives with similar activities taking place at the international level, led by Anglo American with the support of ICMM.
- Reach out to the socially-responsible investment community to help improve CSR-related research activities.



ENERGY COMMITTEE

Chair: Chris Adachi, Leader, Energy and Carbon Management, Teck Resources Limited

The Energy Committee promotes overall energy management, including improved energy efficiency and greenhouse gas intensity performance.

HIGHLIGHTS

- Monitored government progress on setting targets and regulations for GHG emissions.
- Continued measuring and reporting GHG emissions of MAC member companies.
- Improved company results under the TSM Energy Use and GHG Emissions Management Protocol.

ENERGY EFFICIENCY AND GHG REDUCTION

The Energy Committee encourages continuous improvement in enhancing energy efficiency and reducing greenhouse gas (GHG) emissions among MAC members' facilities. Every year, the committee engages the Canadian Industrial Energy End-Use Data and Analysis Centre (CIEEDAC) to prepare industry data on energy, and GHG consumption and emissions. For example, according to CIEEDAC's 2014 report, direct emissions from Canada's metal and non-metal mines accounted for just 0.86% of the country's total GHG emissions in 2012. MAC also participates in the Canadian Industry Program for Energy Conservation, serves as Co-Chair of the Mining Sector Task Force, and engages in the Mining Sector Energy Management Dialogue.

MAC and its members have been involved in federal consultations on measures to regulate GHG emissions for many years. Although the process has been slow, progress has been made in some areas. For example, the federal government has announced standards for heavy-duty vehicle fuel efficiency and coal-fired power plant efficiency. Most recently in 2014, the government announced regulations governing the use of industrial boilers. As a component of these targeted regulations, it is expected that similar measures for the oil and gas and mining sectors will be developed. Through the TSM Energy Use and GHG Emissions Management Protocol, MAC members continue to inventory, measure and report on their energy and climate change management plans, positioning the industry well for any future reporting requirements.

With regard to climate change policies, MAC continues to highlight the importance of global competitiveness, the uniqueness of specific facilities and situations, and individual members' progress on increasing energy efficiency and reducing GHG emissions. MAC has also informed the federal government that the mining industry seeks a simple, low-cost and single-window reporting system under any proposed federal GHG regulatory regime. Given the many different targets and tools that have emerged at the provincial level in recent years, it is clear that developing a single, consistent national policy and reporting system will be difficult, but needed to avoid cumbersome and unnecessary duplication of efforts. Further, MAC continues to emphasize the role that energy efficiency and process investment could play in dealing with climate change, clean air and productivity issues.

CANADIAN INDUSTRY PROGRAM FOR ENERGY CONSERVATION TO FUND TSM

The Canadian Industry Program for Energy Conservation (CIPEC) has confirmed its ability and willingness to fund MAC members in pursuit of the attainment of Levels A (or higher) for the TSM Energy Use and GHG Emissions Management Protocol. The partnership has been designed to provide cost-shared assistance of up to 50% of eligible costs to a maximum of \$40,000 to perform energy management systems implementation, process integration studies and/or computational fluid dynamics studies.

The investment is a significant endorsement of MAC's TSM initiative by the federal government, and is indicative of an increasing and broader level of recognition of the merit of TSM as an effective corporate responsibility standard.





Other Work Areas



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.

HIGHLIGHTS

- Engaged in consultations on the Extractive Sector Review.
- Supported the federal government's negotiation of Foreign Investment Promotion and Protection Agreements.
- Supported the federal government's negotiation of Free Trade Agreements.
- Monitored and responded to trade and economic developments.

The mining industry ranks alongside financial services and oil and gas as the most international of Canada's industry sectors. The industry accounted for nearly 20% of the value of Canadian goods exports in 2013, and an average of 9% of Canada's stock of direct investment abroad. Canada is also a global hub for mining finance, with the Toronto Stock Exchange (TSX) and TSX Venture Exchange (TSX-V) hosting 57% of the world's publicly-listed mining companies. From 2008 to 2012, the two exchanges accounted for 39% of the value of global mining equity financings. In 2013 alone, 48% of all global mining equity financings were handled on the TSX and TSX-V.

Canada's success in mining is influenced in part by the federal government's trade efforts. This includes the overseas network of embassies and trade commissioners, the trade finance capacity through Export Development Canada, and an array of Free Trade Agreements and Foreign Investment Promotion and Protection Agreements.

CANADA'S EXTRACTIVE SECTOR TRADE AND CSR STRATEGIES

In November 2014, the federal government launched two strategies to support Canadian mining abroad, the new *Extractive Sector Trade Strategy* and the enhanced CSR Strategy, *Doing Business the Canadian Way: A Strategy to Advance Corporate Social Responsibility in Canada's Extractive Sector Abroad*. MAC participated in consultations and engaged with Minister Fast on the development of these strategies over the course of the year. The trade strategy builds an extractive-specific element into the *Global Markets Action Plan*, announced by the federal government in 2013, and focuses on removing barriers through the negotiation of trade agreements. It also focuses on increasing the knowledge of the trade commissioner network to better connect Canadian companies with opportunities in other countries and positioning Canada as a partner of choice for Canadian direct investment abroad.

Taken together, these two strategies send a welcome signal that Canada supports and promotes a strong and vibrant Canadian mining sector both at home and abroad. The Government of Canada is also setting a high bar for corporate responsibility performance and furthering Canada's position as a global leader in the extractive sector.

FOREIGN INVESTMENT PROMOTION AND PROTECTION AGREEMENTS (FIPA)

In recent years, the federal government has adopted an ambitious agenda to broaden and modernize Canada's trade infrastructure. As of 2014, Canada has 28 FIPAs in place, has concluded agreements with eight additional countries, and remains engaged in negotiations with 11 others. MAC monitors and feeds into Canada's negotiation efforts on these agreements on a regular basis.

FIPAs are bilateral agreements that place investment-treatment obligations on each country. They also give foreign investors access to independent rules and arbitrators should disputes arise between the investor and the host government. These mechanisms provide Canada's overseas investors with an added layer of security and, while the

enforcement components are rarely used, the mere existence of a FIPA gives foreign governments a set of rules on fairness and transparency.

FREE TRADE AGREEMENTS (FTA)

On March 11, 2014, the governments of Canada and South Korea signed a new FTA—Canada's first with a south pacific country. Of interest to the Canadian mining industry is that the agreement reduces tariffs on certain metals, including iron, aluminum and nickel. A growing market for Canadian mining products, the total value of Canadian mining exports to South Korea in 2012 exceeded \$1.8 billion.

In August 2014, Canada and the European Union (EU) completed the text of the Comprehensive Economic and Trade Agreement (CETA). Upon CETA's implementation, 98% of Canadian and EU tariffs will be eliminated and most remaining tariffs will be phased out over time. Beyond the reduction of tariffs for metal products, the agreement expands into areas of investment, labour mobility and enhanced regulatory cooperation, as well as lifts ownership restrictions on uranium. The agreement is the first in which Canada has included provisions on regulatory cooperation.

Since 2006, several FTAs with Latin American countries have come into force, including Peru (2009), Panama (2013), Colombia (2011) and Honduras (2014), while negotiations remain ongoing with Guatemala, Nicaragua, El Salvador and the Dominican Republic. Additionally, a host of FTA negotiations and exploratory discussions remain ongoing with other regions and countries around the world. This includes ongoing discussions centred on the Trans-Pacific Partnership, and trade negotiations with India and Japan.

MAC remains actively engaged with the federal government on a range of international trade and investment issues, such as the progress being made in the multilateral World Trade Organization Doha Round negotiations (including the Bali Package finalized in late 2013) and the implementation of policy responses on international corporate social responsibility.

In its meetings and discussions with foreign governments, MAC highlights the importance of efficient regulatory processes, modern infrastructure, investment in geological mapping and openness to foreign investment. Two-way flows of foreign investment can provide important conduits for gaining access to new technology, management skills and foreign market opportunities.

MINING INDUSTRY HUMAN RESOURCES COUNCIL (MIHR)

Executive Director: Ryan Montpellier

Board Chair: Ingrid Hann (Head of Human Resources, De Beers Canada)

The Mining Industry Human Resources Council (MiHR) is a non-profit, independent organization with a mandate to identify and address the HR and labour market challenges facing the Canadian mining sector. The organization is financially supported by the Mining Association of Canada and receives the majority of its funding from the Government of Canada and revenue from program activities.

ADDRESSING THE HR CHALLENGES OF THE INDUSTRY

MiHR contributes to the strength, competitiveness and sustainability of the Canadian minerals and metals sector by leading the collaboration of industry stakeholders in the development of solutions to national HR challenges. The Council is governed by a 15-person Board of Directors that provides direction and support to ensure that the stated mission, values and activities deliver tangible results for industry. Members of the Board represent a cross-section of MAC member companies, contractors, organized labour, and educators from across Canada. MiHR also brings together a network of over 250 industry volunteers to help inform its research and guide its project committees.

KEY ACTIVITIES OF MIHR

- **Labour Market Trends, Intelligence and Research:** To provide industry with a centralized, trusted and responsive knowledge centre for minerals and metals labour market trends, intelligence, and research that will become a go-to resource for mining industry stakeholders.
- **Optimizing Human Resources Supply:** To develop and distribute tools that help employers effectively engage all potential sources of labour, including women, Aboriginal people and new Canadians.
- **Standards and Workforce Readiness:** To develop and maintain a suite of National Occupational Standards (NOS) and accompanying essential skills resources for select mining occupations.
- **Credentials and Recognition:** To recognize and promote the skills of individuals through certification, and through the achievements and practices of employers and training providers.

LABOUR MARKET TRENDS, INTELLIGENCE AND RESEARCH: HIGHLIGHTS

National Labour Market Information: MiHR's labour market information (LMI) forecasting model is sector specific and is recognized as the go-to labour market resource for industry. Building on the current MiHR model, the new, publicly-funded LMI project (2014 - 2017) has added forecasting capabilities, including: the ability to track and measure worker mobility; a framework for commodity-based labour market forecasts; and the development of skills forecasts. New information, including the mobility analysis, is published in the June 2015 national labour market report. This, plus research into key underrepresented talent groups, including immigrants, women, and Aboriginal people, will help industry better understand talent gaps and skills shortages.

Regional Labour Market Information: MiHR has completed, or is in the process of creating, the following regional labour market reports:

- *Northwest Territories Mining Hiring Requirements and Available Talent Forecasts, 2014*
- *Nunavut Mining Hiring Requirements and Available Talent Forecasts, 2014*
- *Mining Industry Hiring Requirements and Available Talent Across Canada's North to 2024*
- *Saskatchewan Mining Industry Hiring Requirements and Available Talent Forecasts, 2015*
- *Newfoundland and Labrador Mining Industry Hiring Requirements and Available Talent Forecasts, 2015*



OPTIMIZING HUMAN RESOURCES SUPPLY: HIGHLIGHTS

Mining Alternative Careers for Immigrants: This three-year project will help immigrants living in Canada as well as Immigrant Serving Agencies by increasing their awareness of and access to accurate information about the Canadian mining sector, its careers, and the potential transferability of international skills and knowledge leading to employment in the sector. The intent of the project is to help reduce the industry's need for temporary foreign workers in the long term.

STANDARDS AND WORKFORCE READINESS: HIGHLIGHTS

National Occupational Standards and the Office of the Registrar: MiHR, in collaboration with the industry, creates National Occupational Standards (NOS) for key mining occupations. Certifying workers to industry-defined standards ensures that the training, skills and experience of existing and new workers meet the needs of employers. It also helps to create and support the ongoing growth of a highly-skilled labour pool that will enhance recruitment and retention. MiHR's new NOS project funding (2014-2017) was used to revise three current NOS in 2014 (Underground Miner; Surface Miner; and Minerals Processing Operator) and add three new standards (Industry Trainer; Hoist Operator; and Frontline Supervisor) by 2016.

Mining Essentials: Mining Essentials is a work readiness training program developed in partnership with the Assembly of First Nations to meet two goals: 1) to provide Aboriginal peoples with the skills and confidence needed to enter the mining workforce, and 2) to provide industry with a ready-to-work, local workforce based on a nationally-validated pre-employment program. Since the program's inception, learners have achieved a 75% graduation rate and approximately 75% of graduates are employed or have returned to education.

CREDENTIALS AND RECOGNITION: HIGHLIGHTS

The Canadian Mining Certification Program (CMCP): The CMCP has now certified over 1,000 workers. The program is governed by a multi-stakeholder certification standing committee, which reports to the MiHR Board. Companies implementing this program include: Teck Resources, Glencore, Rio Tinto-Diavik, Cementation, New Gold, De Beers, Imperial Oil Esso (Kearl), Boart Longyear, and others. Under this program national certification is available for workers in the following occupational groups: Underground Miners; Minerals Processing Operators; Surface Miners; and Diamond Drillers.

For more information on the MiHR Council or any of its programs, visit the MiHR website (www.mihrc.ca) or contact MiHR's Executive Director, Ryan Montpellier, at rmontpellier@mihrc.ca.

Directors and Committees



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*Left MAC Board in early 2015

**Joined MAC Board in early 2015



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 Sean Willy, Cameco Corporation**
 Joseph Wabegijig, Hatch & Associates Inc.

*Left position as Chair in early 2015

**Assumed position as Chair in early 2015

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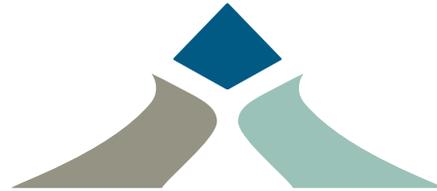
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