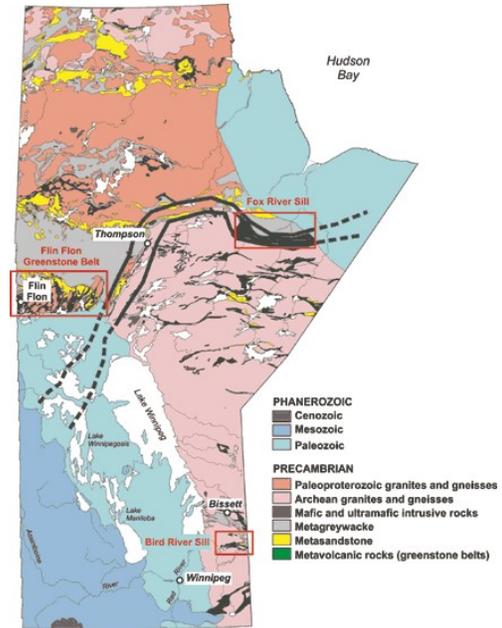


# 2016-2019 Strategic Plan

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**MINING ASSOCIATION OF MANITOBA**



# 2016 SWOT (*Mining in Manitoba*)

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## Strengths

- Vast, untapped regions with high geologic potential.
- Excellent public geologic database.
- Low political risk.
- Good infrastructure to multiple known mineral belts.
- Established corps of prospectors, developed claims.
- Low-cost power.
- Growing First Nations interest in mining industry.

## Weaknesses

- Uncertainty over work permit timeframes.
- High tax levels in every category compared with other Canadian jurisdictions.
- Mining is not seen as a high public policy priority in Manitoba.
- Ongoing attrition of current prospector corps without clear indication of new entrants.

## Opportunities

- When commodity cycle turns, focus goes toward early-stage companies/projects. Investment tends to be rapid and frothy / speculative.
- Other jurisdictions such as Saskatchewan have shown that more focused permitting results in increased investment and also in improved relations with First Nations.
- Northern development / boreal planning processes.

## Threats

- No clear end in sight for global slowdown, low commodity prices.
- Capital markets remain tight. Bay Street remains stretched for new investment capital.
- New park development initiatives and pending caribou strategy.
- Northern development / boreal planning processes.

# Introduction

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Manitoba faces increasingly complex challenges in fostering a healthy mining sector. Mining activity is affected primarily by regulatory, economic, and environmental policies and has the potential to effect a wide range of stakeholder issues.

Success in one or more of these areas can have positive implications for industry, for stakeholders, and for the Province as a whole. Addressing issues that emerge in these areas requires an integrated, responsive and efficient association focused on achieving clearly communicated goals.

The Mining Association of Manitoba's updated 2016-2019 Strategic Plan takes on these challenges through the execution of its strategic priorities and takes action through the activities and recommendations of its six committees.

## Association Governance

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The Association is governed by a Board of Directors, comprised of its common members, which are mining companies in good standing, assessed to have 40 or more employees.

The Association also has a number of associate members, which includes exploration companies, mining service and supply companies, and other companies with a vested interest in the success of the mining industry in Manitoba.

All member companies are welcome to participate in the Association's committees to advance the Association's strategic priorities by developing policy positions for recommendation to the Board, and through various industry initiatives.

- Safety
- Manitoba Mine Rescue Organization
- Aboriginal Relations
- Taxation
- Exploration
- Environment

Additionally, the Association maintains an important role in the governance of mine safety and mine rescue programs in Manitoba.

The mining industry continues to be a leader among all industries in the development and implementation of worker safety programs. The Association's Safety Committee is the central organization in Manitoba for promoting and implementing leading-edge mine accident prevention actions and programs. The Safety Committee also assists in the management of workers compensation for its members.

The Manitoba Mine Rescue Organization (MMRO) provides governance for mine rescue activities within the Province of Manitoba. The MMRO also provides required governance related to the provincial Mine Rescue & Emergency Preparedness Reference Manual and its protocols and ongoing local and provincial mine rescue competency testing.

## Purpose of the Plan

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The purpose of the strategic plan is to support the success of the mining industry and Association members by focusing the activities of the Association staff and committees on those priorities that are most likely to advance the mission and vision of the Association.

All activities undertaken by the Association are founded in the following principles:

- Regulatory, economic, environmental and stakeholder challenges are interrelated. Success in one or more categories can have a positive impact on the others, and on the sector as a whole.
- Overcoming regulatory, environmental, and stakeholder challenges requires an integrated, responsive and efficient Association focused on achieving clearly communicated goals. The mining industry can only be successful if mining activity also contributes toward the success of government, community, and other related stakeholders in the pursuit of their goals.

## Vision and Mission

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### Our Vision

As a global leader in the sector, Manitoba is characterized by a transparent and predictable regulatory climate, safe and secure operations, environmentally and socially sustainable industry practices, and trusting stakeholder partnerships that provide mutual benefits for all. In achieving this vision, the Association cultivates strong relationships with industry, government, Aboriginal and other stakeholders.

### Our Mission

The Association advocates for the collective interests of Manitoba's mining industry and the advancement of the sector through education and collaboration with our industry members, government, Aboriginal and other stakeholders.

#### *Advocate*

By advocating on behalf of its members, the Association raises the profile of the industry in the province and gives voice to industry concerns in order to improve Manitoba's regulatory climate.

#### *Educate*

Through education programming, the Association helps Manitobans understand the contributions, value and sustainability (including safety) of the industry.

#### *Collaborate*

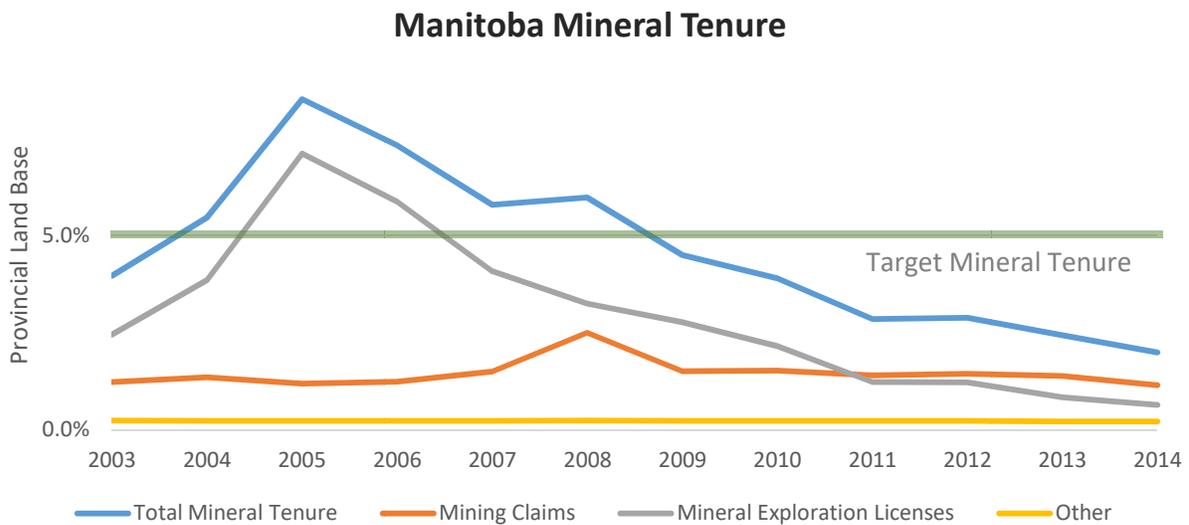
The Association collaborates with all stakeholders to share best practices and work towards improvement.

# Key Targets

The Association works with its members to continuously improve the industry's performance in terms of safety, environment, and Aboriginal and community relations and recognizes a long-term goal of zero harm from all mining operations.

The Association has also identified the following targets as the key determinants of success for mining in Manitoba over the next five years and encourages all Manitoba mining stakeholders to adopt, advocate and work toward the realization of these targets.

- **10% mineral tenure of the Manitoba land base (8.5% in 2005, declining to 2.0% in 2014)**
- **10% exploration expenditures of national total (3.1% in 2016)**
- **10% GDP from mining of Manitoba GDP (2.75% in 2015)**



# Strategic Priorities

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The Association has identified the following five strategic priority areas as the key drivers for fulfilling the Vision and Mission of the Association and for achieving the targets identified in this plan.

## **Safety & Mine Rescue**

Providing expert leadership in the field of safety and health excellence for the mining industry and overall governance for the Manitoba Mine Rescue Program.

## **Aboriginal Relations**

Building relationships with Aboriginal leaders, listening to issues affecting Aboriginal people, communicating issues affecting the mining industry, and identifying common goals that can be pursued together.

## **Competitive Regulatory Climate**

Working collaboratively with government stakeholders to support industry's principal needs for secure and timely access to ground with high mineral potential and for a competitive tax and financial incentive landscape that will attract mining investors seeking fair returns.

## **Communications and Advocacy**

Developing and communicating key messages about the importance of the industry to the province and the policy directions supported by the Association.

## **Education and Information Hub**

Becoming the leading source in Manitoba for information on responsible, safe and sustainable mineral exploration and development.

# Safety & Mine Rescue

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## Goal Statement:

Providing expert leadership in the field of safety and health excellence for the mining industry and overall governance for the Manitoba Mine Rescue Program.

## Focus Areas:

- *Manitoba Mine Rescue & Emergency Preparedness Reference Manual.*
- *Local and provincial mine rescue competency testing.*
- *Industry liaison/presence on related boards and committees.*

Goal	Actions	Timeline	Notes
<b>Mine Rescue &amp; Emergency Preparedness Reference Manual.</b>	Provide governance related to the manual and its protocols.	Ongoing	Keep manual current and consistent with national and international standards.
	Ensure outreach and training is carried out.	Ongoing	Mine Rescue member training and certification, including instructors.
<b>Local and provincial mine rescue competency testing.</b>	Carry out ongoing local and provincial mine rescue competency testing as per the manual.	Ongoing	Annual local and provincial competitions in Manitoba.
<b>Industry Liaison/presence on related boards and committees.</b>	Serve as the industry liaison, fostering strong relationships, with the Workplace Safety & Health department of the Manitoba government as well as the Workers Compensation Board.	Ongoing	Representative on John T. Ryan Committee, WCB Appeal Commission, National Western Region Mine Rescue Committee, and others as required.

# Aboriginal Relations

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## Goal Statement:

Building relationships with Aboriginal leaders, listening to issues affecting Aboriginal peoples, communicating issues affecting the mining industry, and identifying common goals that can be pursued together.

## Focus Areas:

- *Build relationships and generate dialogue with First Nations leaders.*
- *Improve First Nation participation in the economic benefits of mining.*

Goal	Actions	Timeline	Notes
<b>Build relationships and generate dialogue with First Nations leaders.</b>	Participate in Minister's Mining Advisory Council and related working group.	Ongoing	Develop understanding on and provide input on key issues. <ul style="list-style-type: none"> <li>o Government Resource Revenue Sharing.</li> <li>o Duty to Consult.</li> <li>o Free, Prior and Informed Consent.</li> <li>o Engagement intensity through mine life cycle.</li> </ul>
	Establish an Association presence on MMR consultations, where appropriate.	End of 2015	Provide state-of-the-industry update, mining life cycle, economic opportunity insight presentation. Build relationships directly with communities.
<b>Improve First Nation participation in the economic benefits of mining.</b>	Facilitate introductions with potential MEDCO business partners.  Facilitate business planning processes.	Ongoing. Encourage target at least one significant new venture per year.	Encourage participation of MEDCO on government / community consultations.

# Competitive Regulatory Climate

## Goal Statement:

Working collaboratively with government stakeholders to support industry’s principal needs for secure and timely access to ground with high mineral potential and for a competitive tax and financial incentive landscape that will attract mining investors seeking fair returns.

## Focus Areas:

- *Improve permitting certainty and streamline timeframes.*
- *Advocate for competitive tax and financial regulations.*
- *Provide analysis on contribution of mining to Manitoba economy.*
- *Demonstrate how Manitoba mining taxes compare with other similar jurisdictions.*

Goal	Actions	Timeline	Notes
<b>Improve permitting certainty and streamline timeframes.</b>	Map permitting process and identify sticking points.	Ongoing	Work with MMR to formalize a process forward.
	Advocate for firm timelines and clear decision-making bodies at every step of the permitting process.	Ongoing	
	Discuss potential for an accelerated permitting protocol with MMR for willing communities.	To be negotiated with MMR	Possible features: <ul style="list-style-type: none"> <li>o Focussed consultation and duty to respond on early stage permits.</li> <li>o Prospector (7 week) &amp; entrep (2x1 week) training from FN MEDCO.</li> <li>o Traditional area mining activity update from MMR (in place of project-by-project update).</li> <li>o GIS traditional land use mapping.</li> </ul>
<b>Advocate for competitive tax and financial regulations.</b>	Develop relationships with Finance staff.	Ongoing	
	Include Finance staff at MMAC.	To be negotiated with MMR	Consider encouraging participation from CWS, Infrastructure and Transport, and others as applicable.
	Pre-Budget consult.	Annually	
<b>Provide analysis on contribution of mining to MB economy.</b>	Annual survey of payments to provinces and other economic benefits resulting from mining.	Annually	
<b>Demonstrate how MB mining taxes compare with other similar jurisdictions.</b>	Identify key metrics to evaluate and compare policy success over time and across jurisdictions.	Ongoing	
	Identify, analyze and distribute tax analysis documents from major consultancies (PWC, E&Y, KPMG, Deloitte).	Annually, as they come available	

# Communications and Advocacy

## Goal Statement:

Developing and communicating key messages about the importance of the industry to the province and the policy directions supported by the association.

## Focus Areas:

- *Provide a vigorous, engaging, and credible voice for mining in Manitoba.*
- *Participate in government initiatives with potential to impact mining industry.*

Goal	Actions	Timeline	Notes
<b>Provide a vigorous, engaging, and credible voice for mining in Manitoba.</b>	Develop and update association policy book.	Annually, and as needed	Provides preliminary step toward policy development.
	Provide talking point bulletins to members to maintain consistent messaging on issues.		
	Develop and update key messages.		
	Build on relationships with local media.	As needed	
	Be present and network at key Manitoba functions.	Monthly	
	Seek out opportunities to present at functions.	Min 6 events annually	MMR Convention MPDA Others
<b>Participate in government initiatives with potential to impact mining industry.</b>	<ul style="list-style-type: none"> <li>o MMAC (Minister's Council)</li> <li>o MPAC (Mineral Potential)</li> <li>o MPDA (Prospectors)</li> <li>o MAC (Mining Association CA)</li> <li>o MEC (Employer's Council)</li> <li>o LMRC (Labour Management)</li> <li>o WCB (Workers Comp)</li> </ul>	<ul style="list-style-type: none"> <li>2 weeks</li> <li>As issues arise</li> <li>Monthly</li> <li>Email updates</li> <li>Monthly</li> <li>As issues arise</li> <li>TBD</li> </ul>	<p><i>Rate model changes represent significant change in cost structure for industry. Potential for leveraging industry-wide standards to reduce costs.</i></p>

# Education and Information Hub

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## Goal Statement:

Become the leading source in Manitoba for information on responsible, safe and sustainable mineral exploration and development.

## Focus Areas:

- *Provide support to members related to current policy and industry trends, as requested.*
- *Work with Manitoba Geological Survey (MGS) to promote their information library.*
- *Facilitate knowledge transfer of MGS data to key stakeholders such as First Nations.*
- *Build awareness of mining with other stakeholders.*

Goal	Actions	Timeline	Notes
<i>Provide support to members related to current policy and industry trends.</i>	Meet regularly with current and potential members to discuss their current operations, challenges, and opportunities.	As requested	
<i>Work with MGS to promote their information library.</i>	Provide links and explanations from association web site and explanations on how to use the available tools.	Ongoing	
<i>Facilitate knowledge transfer of MGS data to key stakeholders such as First Nations.</i>	Work with MEDCO to build community-specific databases.	Ongoing	
<i>Build awareness of mining with other stakeholders.</i>	Develop mining investor forum.	Tentative, spring 2017	Continue regular meetings with associations and heads of key schools.