



THE QUEBEC MINING SECTOR DURING THE COVID-19 PANDEMIC

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PRESENTATION PLAN

- The Quebec Mining Association
- Mining in Québec
- Facts and figures
- COVID -19 pandemic

QUÉBEC MINING ASSOCIATION

- Founded in 1936
- More than 80 members, comprising:
 - Mining companies, processors and refiners
 - Mining contractors
 - Exploration companies
 - Institutions and non-profit organizations
 - Suppliers of goods and services

QUÉBEC MINING ASSOCIATION

Mission

Promote, support and develop a committed, responsible and innovative mining industry in Québec

Vision

The QMA is a leader and a reference for a responsible, innovative and competitive Québec mining industry, within a sustainable development perspective

Values

Membership in the QMA entails compliance with the values of:

- Respect
- Transparency
- Responsibility
- Teamwork

ROLE OF THE QMA

- Represent Québec's mining industry in relations with the federal and provincial governments
- Support the efforts made by its members in the fields of the environment, health and safety, technological R&D, training, human resources, community relations, etc.
- Promote the general interests of the mining industry
- Provide member companies with services
- Communicate the opinions, commitments, objectives and achievements of Québec's mining industry to various stakeholders and the medias



ACTIVITIES AND AREAS OF INTEREST OF THE QMA

- Communications and Public Affairs
 - Committee - communications and public affairs
 - Press relations
 - Mass-market communications – communications campaign
 - Coordination of Québec Mining Week
- Ground Control
 - Committee – ground control
 - Ground control program
 - Audits
- Sustainable Development
 - TSM (implementation, training and support)
 - Sustainable development charter and strategy
 - Inventory of the circular economy initiatives
- Maintenance
 - Committee – maintenance
 - Audits



ACTIVITIES AND AREAS OF INTEREST OF THE QMA

- Environment
 - Committee - environment
 - Regulatory monitoring
 - Weekly press release
- Community Relations
 - Committee – community relations
 - Guidelines for relations with Aboriginal communities
- Taxation
 - Committee - taxation
- Human Resources and Manpower Development
 - Committee – human resources
 - CSMO / APSM / INM
 - Links with universities and training centres

ACTIVITIES AND AREAS OF INTEREST OF THE QMA

- Mine Rescue (Catamine)
 - Committee – Catamine
 - CNESST - mine rescue training service
- Health and Accident Prevention
 - Committee – health and accident prevention
 - Supervisory Formula and Work Card
 - Modular training for mine workers
 - Incident reports
 - CNESST (357 and 357.1 regulatory committees; technical subcommittees)
 - APSM
 - Health and safety audits (4)
 - Nursing protocols
 - Management diagnoses and training for management teams
 - F.J O'Connell Trophy (recognition for accident prevention and improvements in the safety record)
 - Accident statistics (web platform)



SUSTAINABLE DEVELOPMENT

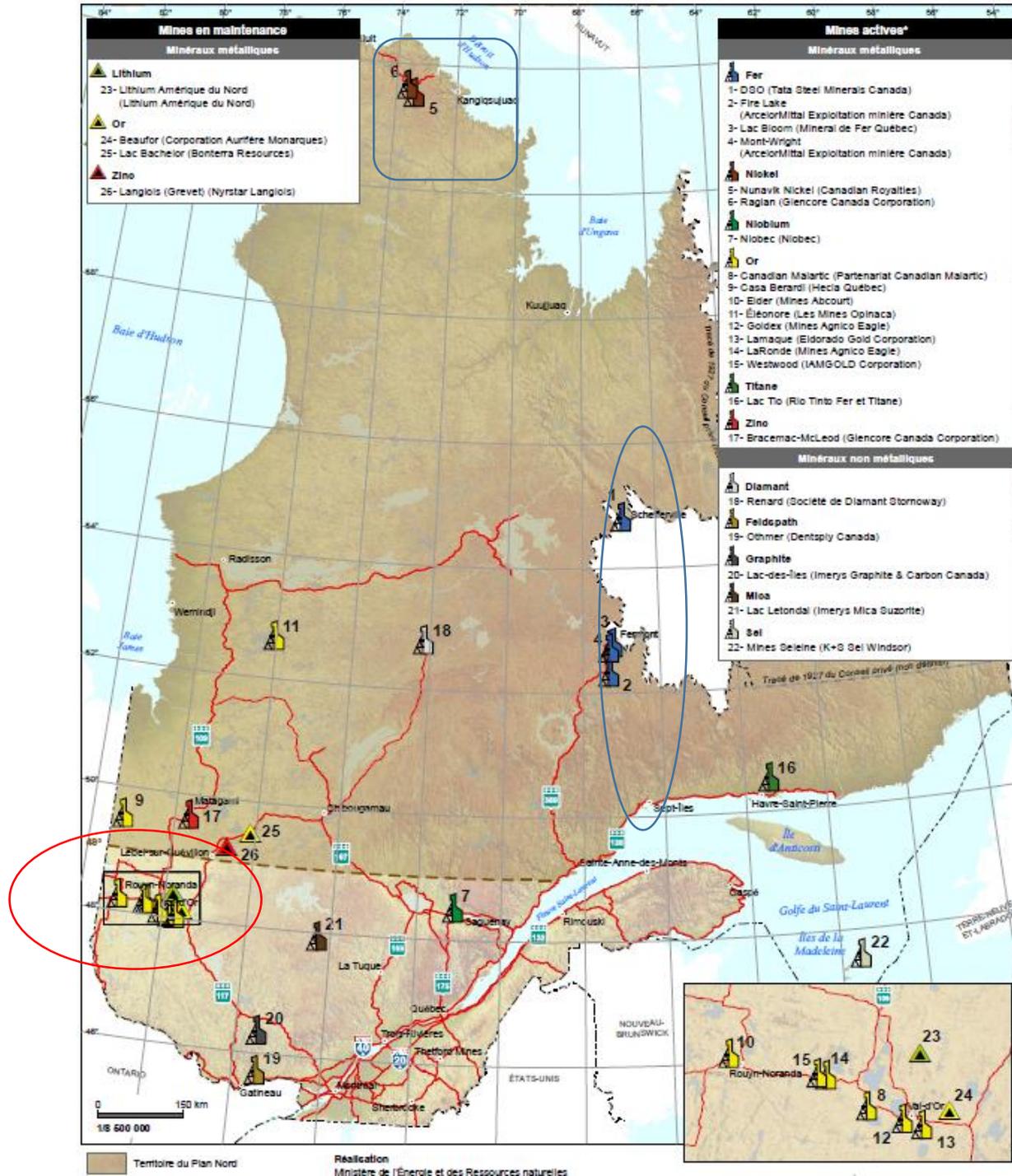
- Towards Sustainable Mining (TSM):
 - Mandatory for QMA members
- Sustainable development charter of mining companies working in Quebec:
 - To ensure that mining companies working in Québec adopt the best practices in the field of corporate social responsibility in order to maintain an innovative and competitive mining industry
- Guidelines on relations with Aboriginal communities
 - To ensure that mining companies working in Québec establish and maintain harmonious and respectful relations with the Aboriginal communities in order to favour the reconciliation of the uses of the territory



22 active mines:

17 of metallic minerals

5 of non-metallic minerals



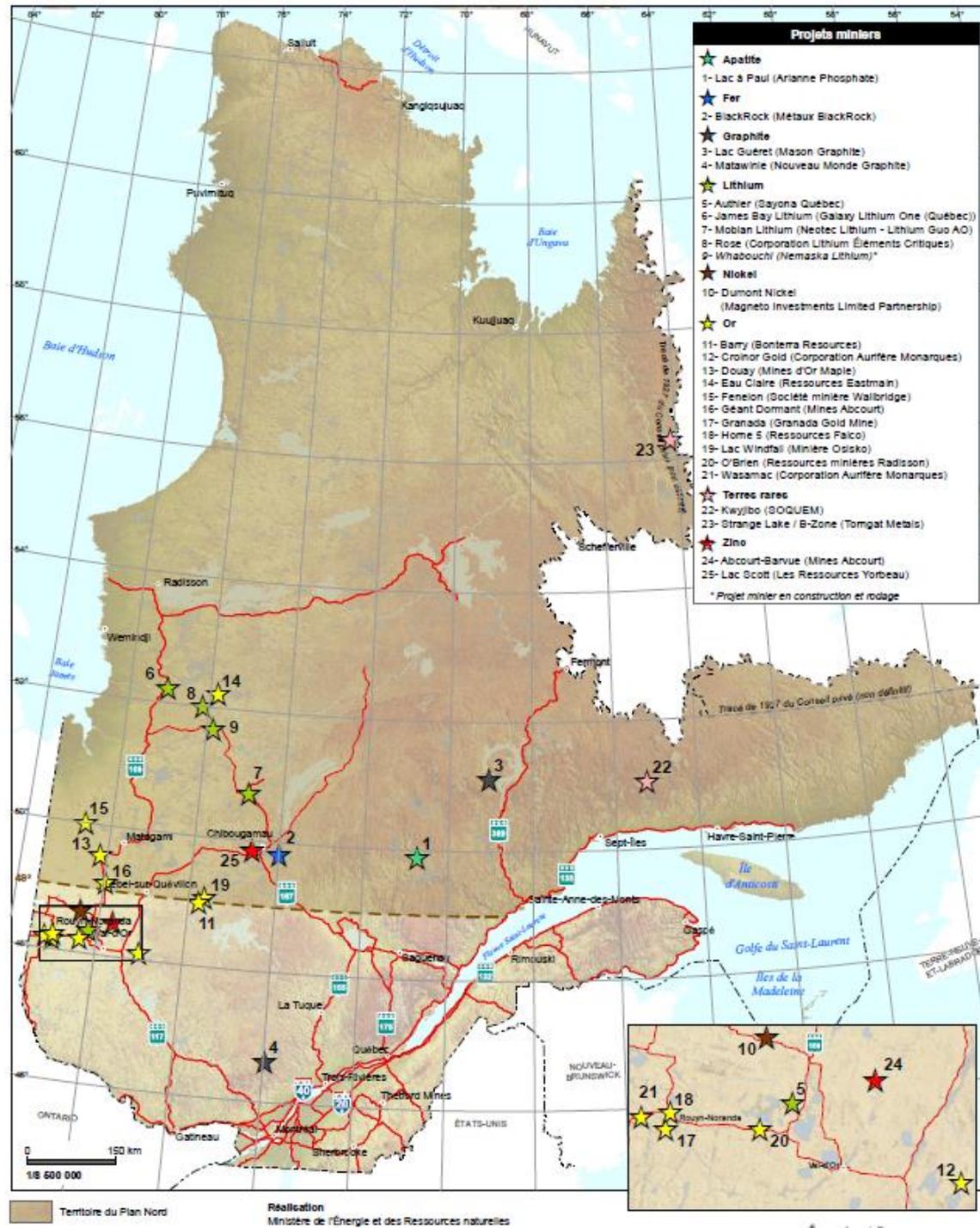
> 30 minerals

Majority:
Gold and Iron ore

- 5 CSM

25 projects in development:

- 11 – gold
- 5 – lithium
- 2 – rare earth



FACTS AND FIGURES

FOOTPRINT

- Past and current mines cover 0,03 % of the territory;
- Active mines occupy 0,005 % of the territory;
- Claims cover 4,1 % of Quebec;
- Less than 15 % of the underground is currently known.



FACTS AND FIGURES (2018)

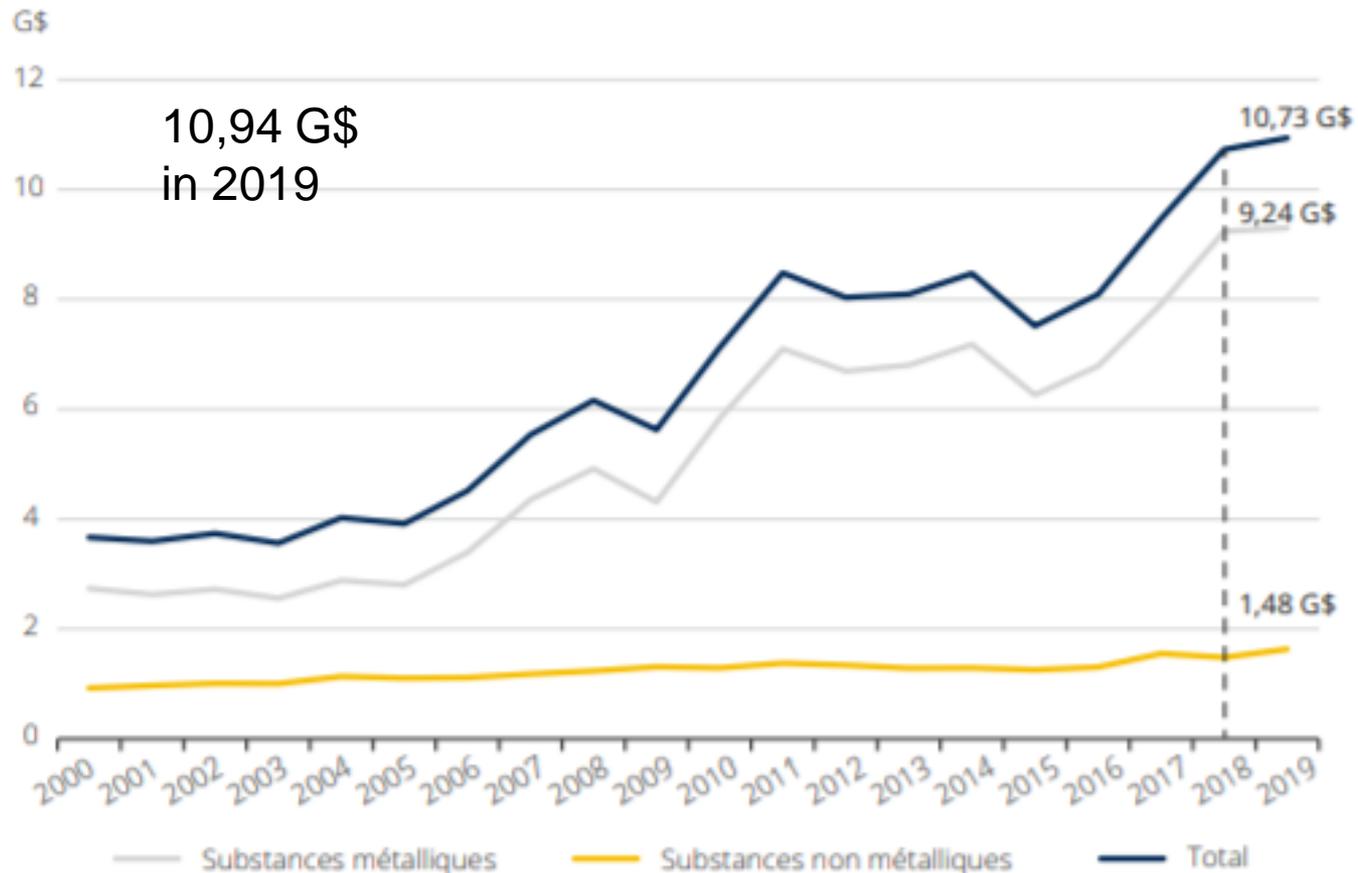
ECONOMIC BENEFITS

- 48 000 direct, indirect and induced jobs;
- 1,8 G\$ in wages for exploration and extraction;
- 3 800 suppliers – everywhere in Québec;
- Total expenses = 9,9 G\$;
- 1,8 G\$ paid each year to our two levels of government;
 - 1,3 G\$ to the Government of Québec;
- Contribution to the Québec GDP = G B\$.



VALUE OF MINERAL SHIPMENTS

Évolution de la valeur des livraisons minérales, Québec, 2000-2019¹

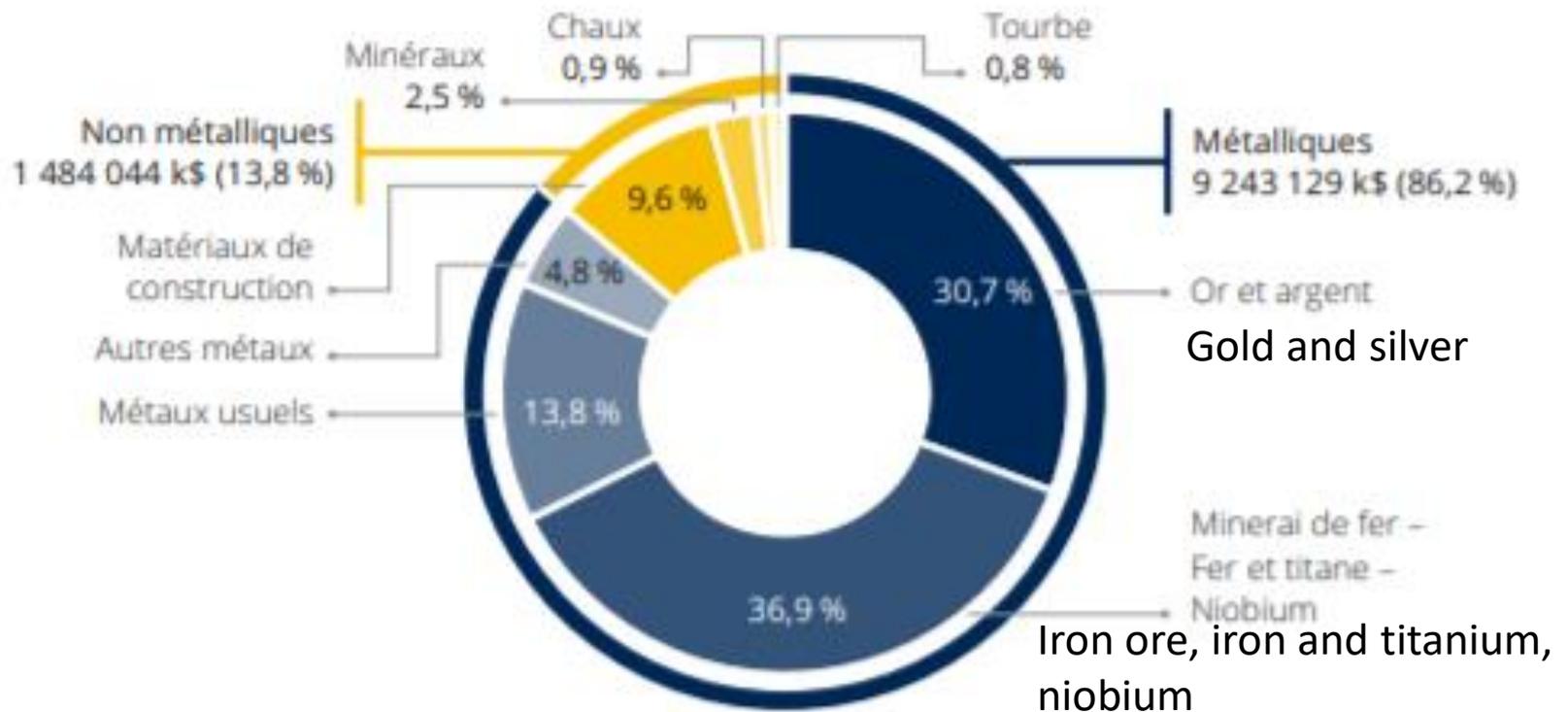


1. 2000-2018 : données finales ; 2019 : données provisoires.

Source : Institut de la statistique du Québec, Recensement annuel sur la production minérale.

VALUE OF MINERAL SHIPMENTS

Répartition de la valeur des livraisons minérales selon le type de substances, Québec, 2018

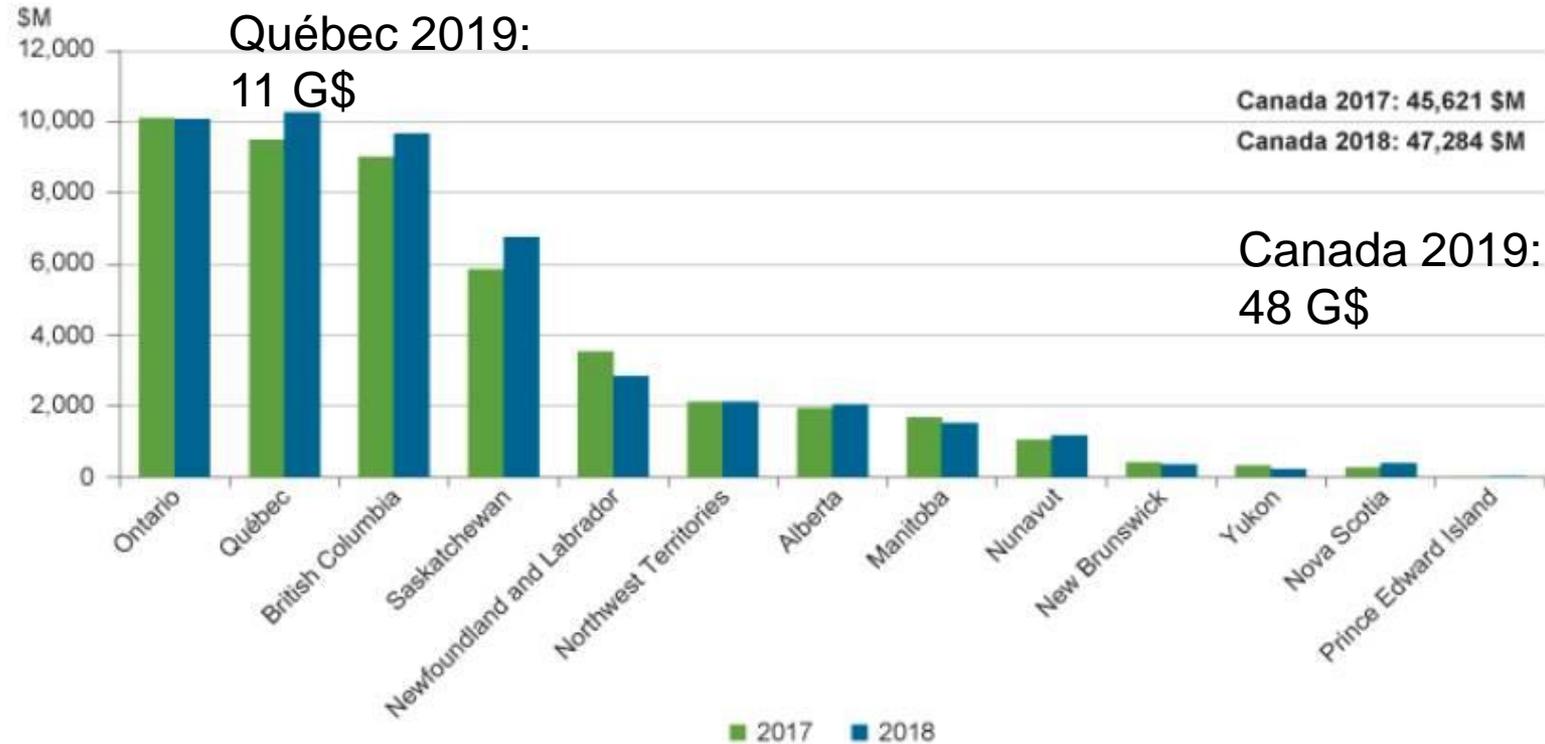


Source : Institut de la statistique du Québec, *Recensement annuel sur la production minérale*.

QUÉBEC IN CANADA

Value of mineral shipments in Canada

Value of mineral shipments, Canadian provinces and territories, 2017-2018¹



1. 2017: final data; 2018: preliminary data.

Sources: Natural Resources Canada, *Annual Survey of Mines, Quarries and Sand Pits* (except Québec).
Institut de la statistique du Québec, *Annual Census on Mineral Production* (Québec).

QUÉBEC IN THE WORLD

- Fraser Institute Annual Survey of Mining Companies:
 - Best mining jurisdiction from 2007 to 2010;
 - 6th in 2018;
 - 2nd in Canada
 - 4th in 2019;
 - 2nd in Canada
 - 18th in 2020 (environmental permitting processes under review at both levels of government)
 - 3rd in Canada

**Our competitors are everywhere
on the planet!**



THE STRENGTHS OF QUÉBEC

- Workforce amongst the best in the world;
 - Quebecers are employed in mines all over the world;
- Recognized expertise;
 - 42 university programs related to mining offered in 9 institutions;
 - 9 research chairs;
- Excellent supplier network;
- Leader in occupational health and safety.



THE STRENGTHS OF QUÉBEC

- Political stability;
- Good reputation of our mining sector;
- Government vision for the development of critical and strategic minerals:
 - Québec has the most variety of critical and strategic minerals in Canada
- Good environmental performance:
 - More than 100 laws, norms and regulations (federal et provincial)
- Access to clean energy (hydroelectricity)



OPINION ON MINING IN QUEBEC

- 67% of Quebecers believe that metals and minerals play an essential role in their everyday life.
- 84 % of Quebecers agree that the mining sector creates good opportunities for young people.
- 72 % of Quebecers agree that the mining sector creates good opportunities for Aboriginal people.
- 71 % of Quebecers believe that the mining sector deserves a good reputation.



OPINION ON MINING IN QUEBEC

- 68 % of Quebecers believe that mining companies are good neighbours.
- 74 % of Quebecers agree that mining companies make efforts to limit their environmental impact.
- 88 % think that mining is positive for Quebec's economy.
- 61 % of Quebecers believe that the Quebec government should do more to promote mining investment in the province.



COVID-19 PANDEMIC

TIMELINE

- March 24 - Closure of all non-essential businesses until April 13
 - Mining industry (priority sector) – activities to be reduced to a minimum
 - Mining companies deployed their emergency plan and put their operations in care and maintenance
 - 5 mines were exempted (iron ore, salt, niobium, titanium)
 - Québec – the only province in Canada where mining was not deemed essential
 - Telework the new norm

COVID-19 PANDEMIC

TIMELINE

- April 15 – Resumption of mining activities (mineral production only)
 - First sector to resume operations with residential construction
 - Exclusions: exploration, construction, fieldwork, expansion work, projects development, etc.
- May 11 – All mining operations are permitted



Health and safety of workers, of their families and the population – the first priority

- Even before production interruption, the mining industry had gone ahead and put in place important preventive, physical distancing and sanitary measures
- March 24 - Collaborative work started on the élaboration of preventive measures
 - Industry / QMA / MERN
- Objective:
 - Resumption of mining activities to take place without risks for the workers, their health and their security, as well as those of their loved ones and the population
- Approach: intervention before or at the point of entry to the site in order to give access only to those without symptoms or those that are not within the different risk groups



COVID-19 PANDEMIC

- Sorting of workers before entering the workplace:
 - Exclusion of workers aged 70 years or more (65 years for Fly in / Fly out operations)
 - Exclusion of workers with a body temperature of 38°C or more
 - Exclusion of workers exhibiting COVID-19 symptoms within the last 14 days
 - Exclusion of workers that traveled outside of the country in the last 14 days
- Exclusion of anybody that came into contact with an infected person or exhibiting symptoms such as fever, cough or respiratory distress within the last 14 days

COVID-19 PANDEMIC

- To limit the risks of propagation at the mine site :
 - Cleaning and disinfection of common areas, workspace, cages, vehicles, mining equipments, machinery, frequently touches surfaces, etc.;
 - Physical distancing imposed for the transport of workers (planes, buses, trucks, mining vehicles, cages, etc.);
 - Physical distancing mandatory in common areas or in the workspace;
 - Organization of work methods;
 - Training and information plan;
 - Suspension of all non-essential visits;
 - Non-essential personnel to do telework.



COVID-19 PANDEMIC

- No meetings of more than 10 workers
- When impossible to respect the 2 m of distancing - protective personal equipment (mask, gloves and glasses) is absolutely required
- Toolkit from the Occupational Health and Safety Commission:
 - Workplace Sanitary Standards Guide for the mining industry – COVID-19
 - Daily checklist
 - Preventive measures to protect the health of workers

COVID-19 PANDEMIC

Status report as of May 26

- Two mines have not yet restarted their mining operations
 - in care and maintenance
- Good adaptation of the workers
- Visits from the Occupational Health and Safety Commission and Public Health
 - Everything is going well.



COVID-19 PANDEMIC - SOLIDARITY

- > 1,3 M\$ in donation to community organizations
- Donation of masks, of liquid disinfectants and personal protective equipments
- Transport of medical materials to remote and isolated communities

GRACIAS!

Quebec Mining Association

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