What We Heard

A summary of the feedback received from the public engagement process on the development of a Critical Minerals Strategy

October 2023

Newfoundland & Labrador

This publication is available in alternate formats upon request.

Please contact EngageCriticalMinerals@gov.nl.ca.

Photo credit - Vale Newfoundland and Labrador

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Introduction

Critical minerals are essential for economic security and the transition to a green and digital economy. The demand for critical minerals is anticipated to greatly increase and will require additional supply, new products and manufacturing capacity.

Newfoundland and Labrador has tremendous critical mineral potential that can support new mines, mineral processing and manufacturing based here in the province. Developing our critical minerals could form the basis of competitive advantages and participation further along the supply chain.

To help further position Newfoundland and Labrador as a stable, responsible supplier of critical minerals and ensure appropriate policy frameworks are in place to sustainably develop its mineral resources, the Government of Newfoundland and Labrador has been seeking public input on the development of the Newfoundland and Labrador Critical Minerals Strategy. This Strategy will guide the development of new resources, potential mineral processing facilities and new manufacturing opportunities.

The overall objective of engagement was to provide all stakeholders an opportunity to provide input on how to unlock the province's critical mineral potential, in a way that maximizes its value.

This document will outline the process that was undertaken to seek input and will summarize what was heard during the engagement process, including comments recorded during public and stakeholder virtual sessions, online questionnaire results and comments, as well as input received via written submissions. Concerns and recommendations have been extracted from feedback and categorized. Valuable data from this process will be used to inform the development of a critical minerals strategy for Newfoundland and Labrador.

Engagement Process

The approach gathered input into developing a critical minerals strategy, which was designed and implemented with the support of the Public Engagement and Planning Division (PEP).

The Department of Industry, Energy and Technology (IET) requested input from the public, industry and stakeholders through the Province's online engagement platform, engageNL from June 9 to July 14, 2023. IET issued a press release to communicate the beginning of the engagement process and to direct interested parties to the engageNL site. This site included:

- A landing page which provided an overview of the engagement process
- A presentation in pdf format, which included an overview of critical minerals, the purpose of a strategy, Newfoundland and Labrador's strategic assets and potential focus areas for the Strategy
- A schedule and Eventbrite links to pre-register for virtual engagement sessions
- An online questionnaire
- An option of providing a written submission to IET by email or mail

In collaboration with IET, PEP hosted and supported three virtual engagement sessions.

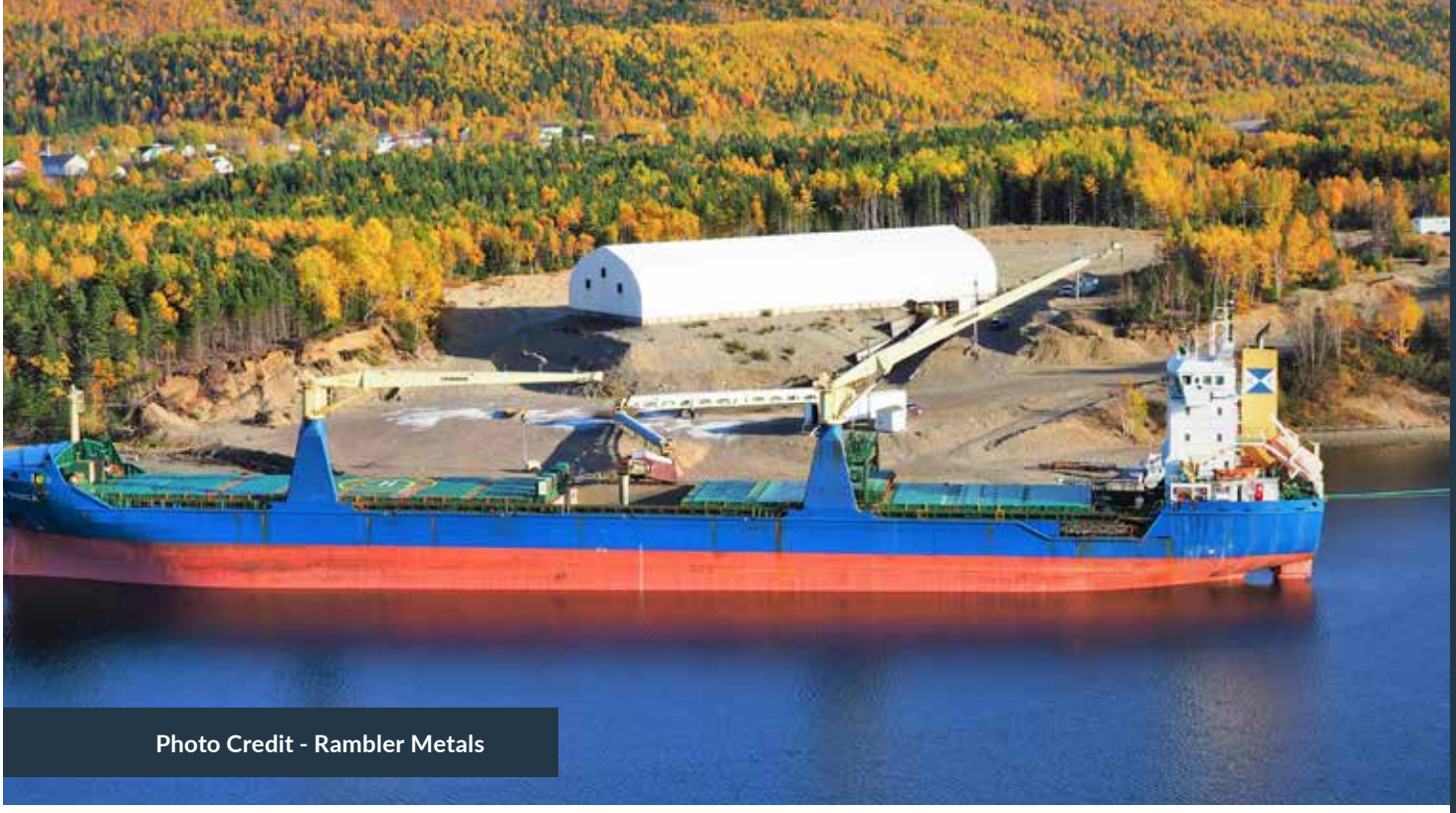


Photo Credit - Rambler Metals

On June 5, 2023, the Department of Industry, Energy and Technology commenced engagement with Indigenous Governments and Organizations, inviting input in the development of a critical minerals strategy for Newfoundland and Labrador. A virtual meeting was offered as an opportunity to discuss the organizations' detailed views on the development of a provincial strategy. Each organization was also offered the option to provide written comments via email.

To promote and encourage high participation in the engageNL engagement process, the Department of Industry, Energy and Technology sent an email to stakeholders such as; industry associations, industry (prospectors, exploration companies and operators), post-secondary institutions, women/equity seeking organizations, municipalities and chambers of commerce. PEP also distributed an email notice to registered users of the Provincial online engagement platform inviting participation in the process.

IET held 20 additional stakeholder sessions including Indigenous Governments and Organizations, mining and junior exploration companies targeting minerals required for the green transition and academic institutions in the research and innovation space.

Participation

A total of 24 individuals participated in the public virtual engagement sessions that discussed developing a critical minerals strategy. An overview of participants can be found below.

Session	Date	Number of Participants
Public Session 1	June 19, 2023	11
Public Session 2	June 21, 2023	2
Public Session 3	July 5, 2023	11

Individual attendance during additional stakeholder engagement sessions changed as people entered and left meetings based on topics and schedules. It is estimated that 100 people in total participated in the 20 sessions.

Written submissions were received from 16 individuals, companies, groups and Indigenous Governments and Organizations.

In total, 76 questionnaire submissions were received through engageNL.

The discussion document was also presented at conferences during the engagement period including the Baie Verte Mining Conference and the Expo Labrador Conference in Goose Bay. This provided an opportunity for detailed discussions with conference attendees representing all stages of mineral development and supporting goods and services.

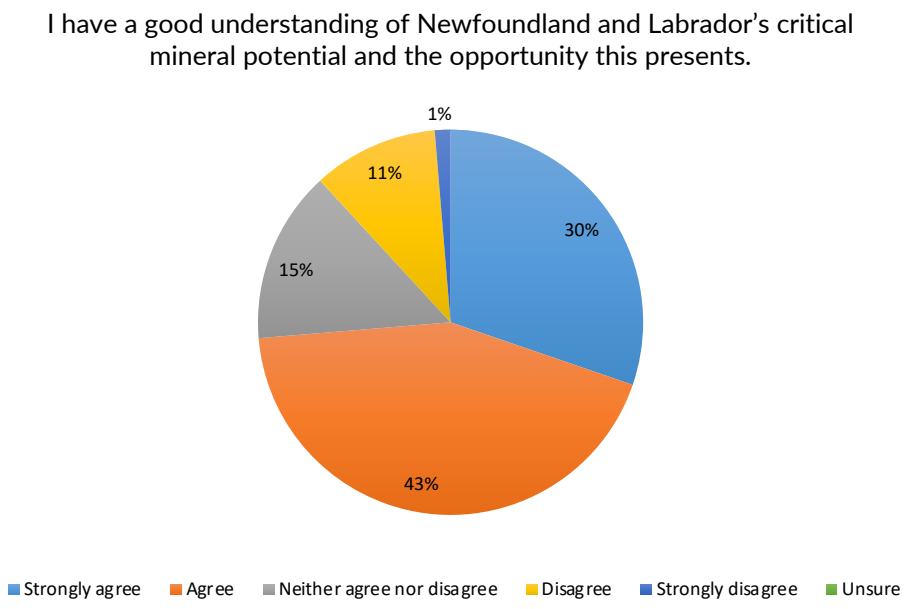
Representation from across the province and industry was achieved via the inclusion of participants such as Indigenous Governments and Organizations, mining and exploration companies, prospectors, service companies, associations and academic institutions.

Feedback

The discussion document outlined the opportunities around critical minerals, Newfoundland and Labrador's strategic assets and potential focus areas were presented throughout all engagement activities. General feedback was positive indicating a level of support for potential pillars, areas of action and individual actions.

With respect to questionnaire responses, it should be noted that a small minority of respondents did not answer every question. As such, the subsequent charts reflect the percentage of individuals that responded under each question. Percentages may not total 100 due to rounding.

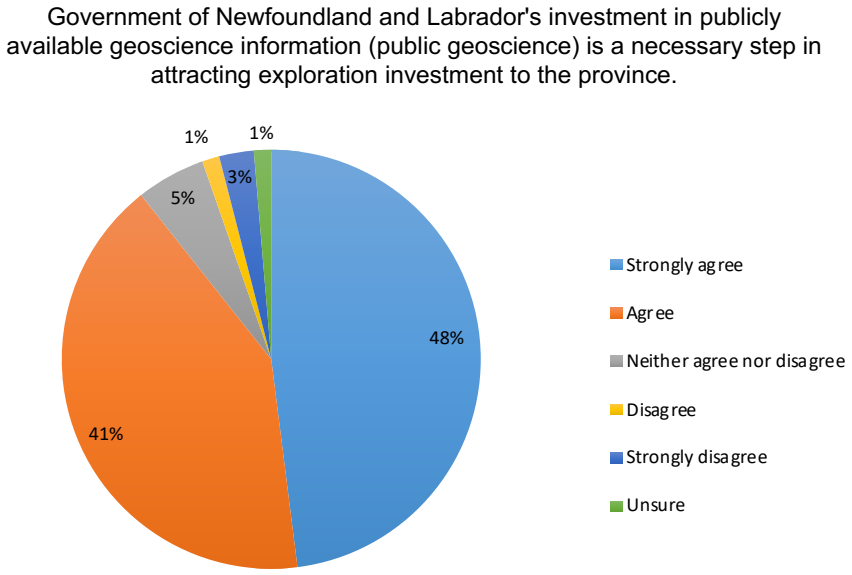
The majority of respondents (73 per cent) strongly agreed or agreed that they have a good understanding of the critical mineral potential in Newfoundland and Labrador and the opportunity this presents.



Unlocking our Critical Mineral Potential

Expand and Promote Geoscience

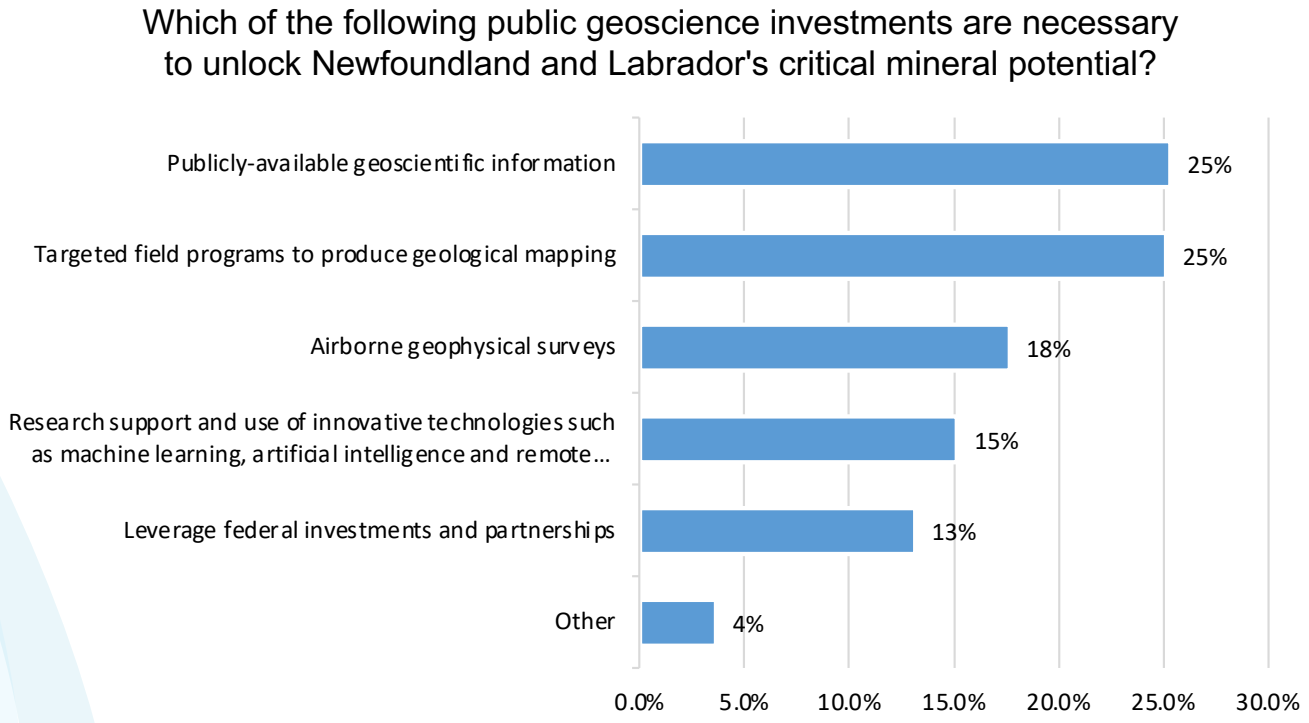
Results from the online questionnaire show that the majority of participants agreed that the Government of Newfoundland and Labrador's investment in publicly available geoscience is a necessary step in attracting exploration investment to the province. Of those that completed the online questionnaire, 89 per cent indicated that they strongly agree or agree with the investment in public geoscience as a necessary first step. Based on discussions from the engagement sessions (virtual and stakeholder), there was a strong agreement from the majority of participants that this is the first step. Few individuals disagreed, stating that other focus areas such as unlocking exempt mineral lands should be the first step in attracting exploration investment to the province.



Investments in publicly available geoscientific information (25 per cent), targeted field programs to produce geological mapping (25 per cent) and airborne geophysical surveys (18 per cent) were seen as the three most necessary public geoscience investments to unlock Newfoundland and Labrador's critical mineral potential by individuals who completed the online questionnaire. Other comments from the questionnaire suggested that increased investments for the drill core storage and retrieval program are needed. The department heard that up-to-date geoscience needs to be more available to help de-risk investment. Few participants suggested that geoscience data is already available and the Provincial Geoscience Atlas is the most comprehensive, up-to-date and accurate spatial data source among provincial datasets. Participants shared that mapping is a priority and results must be released in a timely manner. Many participants in the engagement and written submissions shared similar ideas to comments received from the online questionnaire, as all groups agreed that existing geoscience data needs to be more available and useable by suggesting that:

- Industry should provide digital data.
- Geoscience formats should be standardized to facilitate data sharing among stakeholders.
- Geoscience data should be made available through an open source, user-friendly platform.

- Geoscience data should be compiled from various sources.
- Raw data maps should be published, along with the interpretations of those maps.
- Feedback mechanisms are needed to help improve the quality and relevance of public geoscience.
- Post-secondary students be included to help with updating and digitizing data.
- Steady funding of government programming such as the Geological Survey of Newfoundland and Labrador is key to developing maps and models, which form key inputs to exploration.



Many participants in the online questionnaire, written submissions and virtual sessions confirmed that investing and fully utilizing available funding for baseline geoscience is necessary. Comments from the online questionnaire and engagement sessions included:

- Baseline geoscience airborne surveys are needed and some areas should be re-flown with updated equipment.
- Field programs have been lacking in recent years.
- Regional geophysical surveys must be target focused.
- Enhancement is needed to existing geological maps using geophysics, geochemistry and remote sensing.

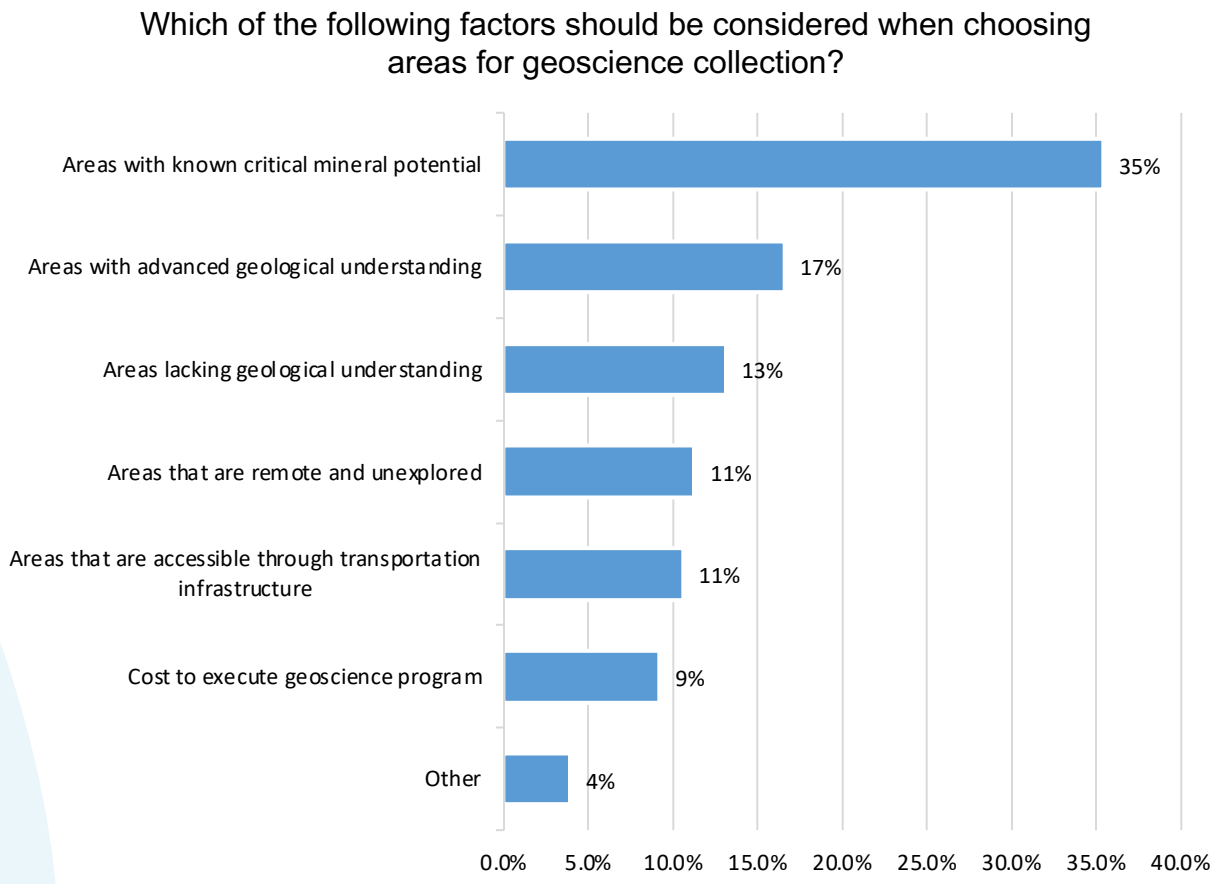
According to the questionnaire results, individuals agreed that research support and the use of innovative technologies such as machine learning, artificial intelligence (AI) and remote sensing is a necessary public geoscience investment. Participants in the virtual sessions also agreed, stating that we can use AI to think differently about older datasets, reprocessing existing data can produce a huge amount of new information. Others agreed that innovative technologies could be used to enhance existing geological maps or identify deposits that are harder to find.

Many participants through the questionnaire and sessions shared that engagement opportunities, such as public lectures, to learn more about ongoing research and modern trends in the industry is a necessary public geoscience investment. Other stakeholders including Indigenous Governments and Organizations would like to see outreach programs to help create awareness and appreciation for the value of geoscience information.

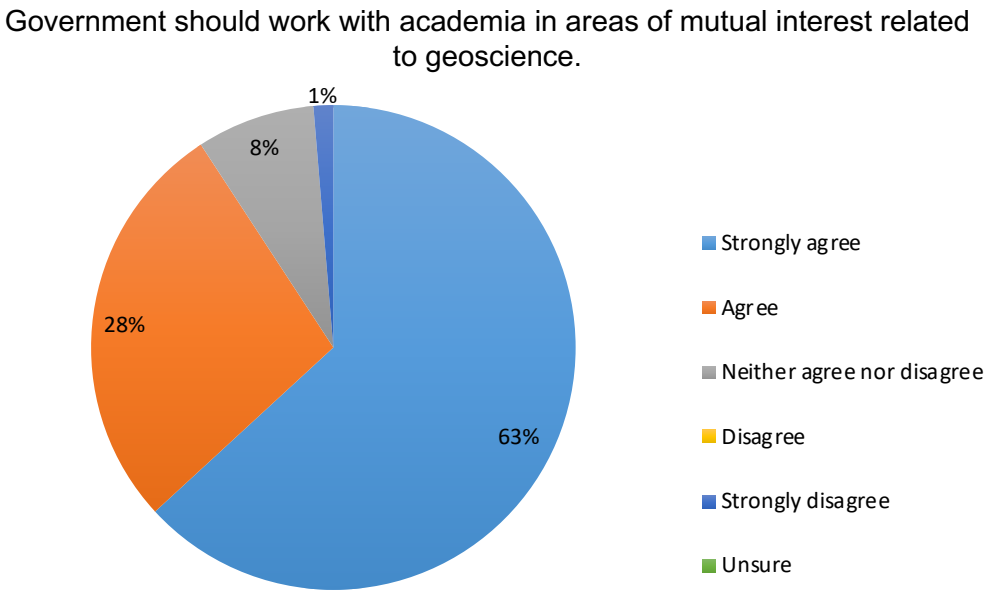
Photo Credit - Geological Survey Newfoundland and Labrador

In the online questionnaire, most participants (35 per cent) agreed that areas with known critical mineral potential should be the focus of geoscience collection. Participants saw areas with advanced geological understanding as the second factor to consider when choosing areas for geoscience collection. Areas lacking geological understanding ranked as the third factor, followed closely by areas that are remote and unexplored and areas that are accessible through transportation infrastructure. The cost to execute the geoscience program was ranked as the sixth factor to consider when choosing areas for geoscience collection. Other focus areas identified in the questionnaire included:

- Areas that have clearly defined rights to mineral claims.
- Areas that do not negatively impact existing provincial resources.
- Areas that have minimum impact on birds, wildlife and plants.



A large majority (91 per cent) of online questionnaire participants strongly agreed or agreed that government should work with academia in areas of mutual interest related to geoscience.

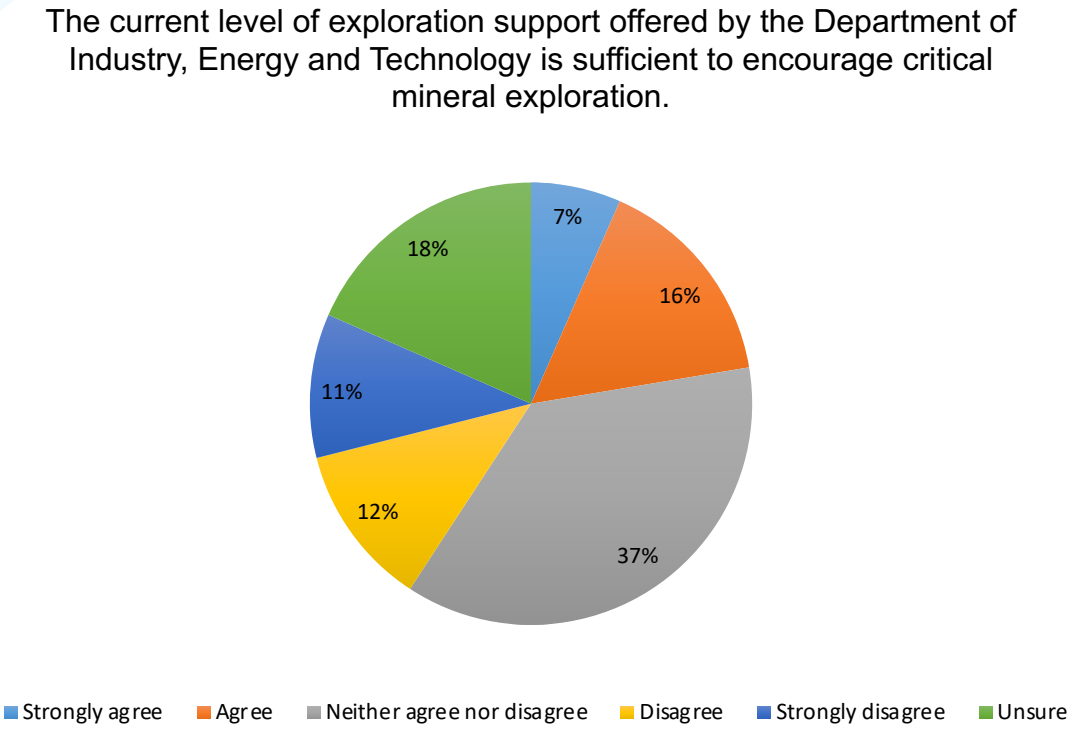


Additional comments related to geoscience from the virtual sessions and written submissions include:

- More geologists are needed to do work on ground truthing.
- More regional geologists are needed to do detailed structural mapping.
- Newfoundland and Labrador should participate in a Hyperspectral Critical Minerals Database.

Prospecting and Exploration

According to the online questionnaire, there was no clear consensus on whether the current level of exploration support offered by the Department of Industry, Energy and Technology is sufficient to encourage critical mineral exploration. Twenty-three per cent of participants strongly agreed or agreed with the statement provided, while 23 per cent of participants strongly disagreed or disagreed. The majority of individuals (37 per cent) neither agreed nor disagreed and the remaining 18 per cent of participants were unsure.



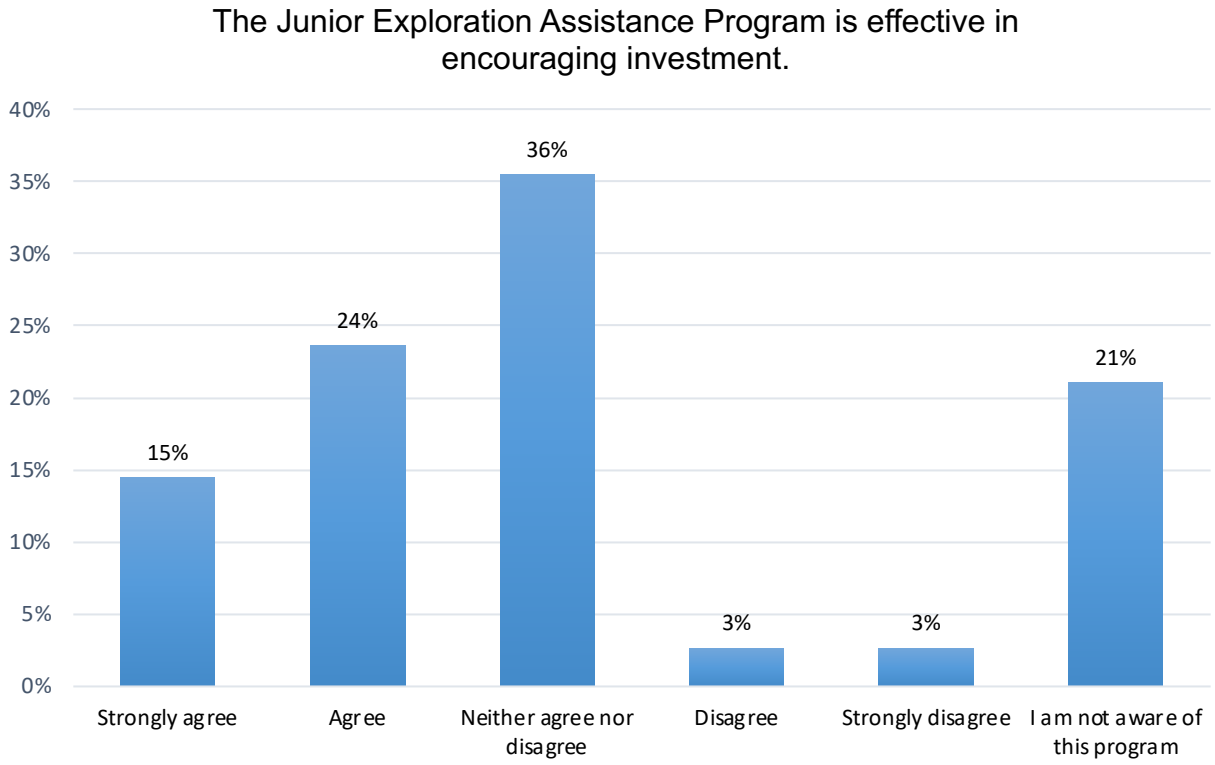
During engagement sessions, participants shared a number of comments regarding exploration support. Many discussed the prospector training program, which included comments such as:

- The training needs to be offered more frequently.
- The training should be offered on-demand, online.
- It is preferred that in-person training and/or practicum be delivered in some Indigenous Governments and Organizations communities.
- Training should be offered in areas with the population needed to support the exploration activity.
- Collaborate with educational institutions and industry associations to offer specialized training in geoscience, mineral exploration techniques and sustainable mining practices.
- Some Indigenous Governments and Organizations suggested that online training is not an option, in-person learning works best for some people.

Other comments from participants related to supporting prospector development include:

- Expand opportunities for training and upskilling for women, Indigenous Peoples and other underrepresented groups.
- Have trained geologists do outreach programs (specifically for training in UV analysis, geophysics, gravity separation techniques and sieve analysis).
- Place a full-time mineral geologist in Happy Valley-Goose Bay.
- Host a workshop to explain the prospector's assessment report format.
- Provide funding for students who want to become prospectors.

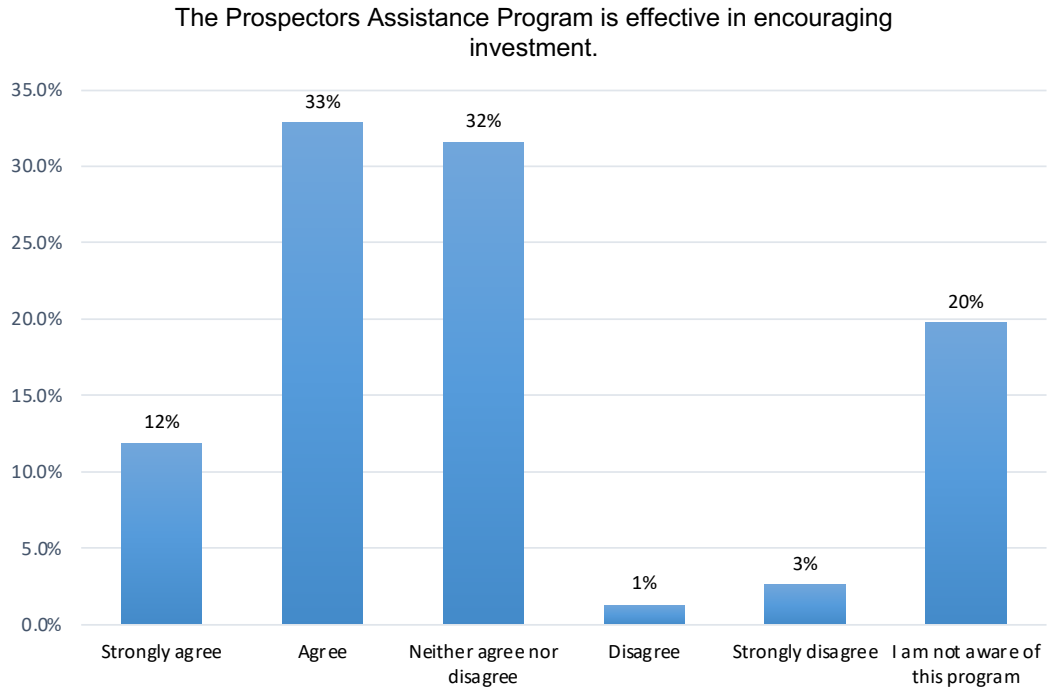
As shown in the questionnaire results, 21 per cent of participants were not aware of the Junior Exploration Assistance (JEA) program. Most participants (39 per cent) either strongly agreed or agreed that the JEA program is effective in encouraging investment. Six per cent of participants disagreed or strongly disagreed that the JEA program is effective in encouraging investment. The remaining 36 per cent of individuals neither agreed nor disagreed with the statement provided.



The department heard that while JEA is a great program, it is oversubscribed. Participants shared that since the program is oversubscribed, the funding provided is much lower than it could be, making the program less of an incentive. Individuals suggested that JEA needs more funding and few participants shared it should be limited to smaller companies or individuals. Additional comments include:

- JEA makes fundraising easier, but it needs more promotion.
- Companies receiving revenue from mineral production within the province should not be allowed to avail of JEA funding.
- The Provincial Government should work with industry associations and Indigenous Governments and Organizations to increase funding for exploration companies.
- Support is needed both on and off the mining lease, as exploration is the first expense cut when funding gets low.
- More attention should be paid to the quality and history of management of junior companies and the impact of foreign investment within some junior companies.
- JEA program should be evaluated each year to determine what adaptations are needed.
- JEA should be replaced with provincial flow-through share.
- Flow-through shares are destructive.
- Exploration assistance could include wage subsidy, tax breaks on operational costs, carbon tax breaks or assay lab discounts.

When asked if the Prospectors Assistance (PA) program is effective in encouraging investment, 45 per cent of participants strongly agreed or agreed. Twenty per cent of participants were unaware of the program. Four per cent of people either disagreed or strongly disagreed that the PA program is effective in encouraging investment. The remaining 32 per cent of participants neither agreed nor disagreed with the statement provided.

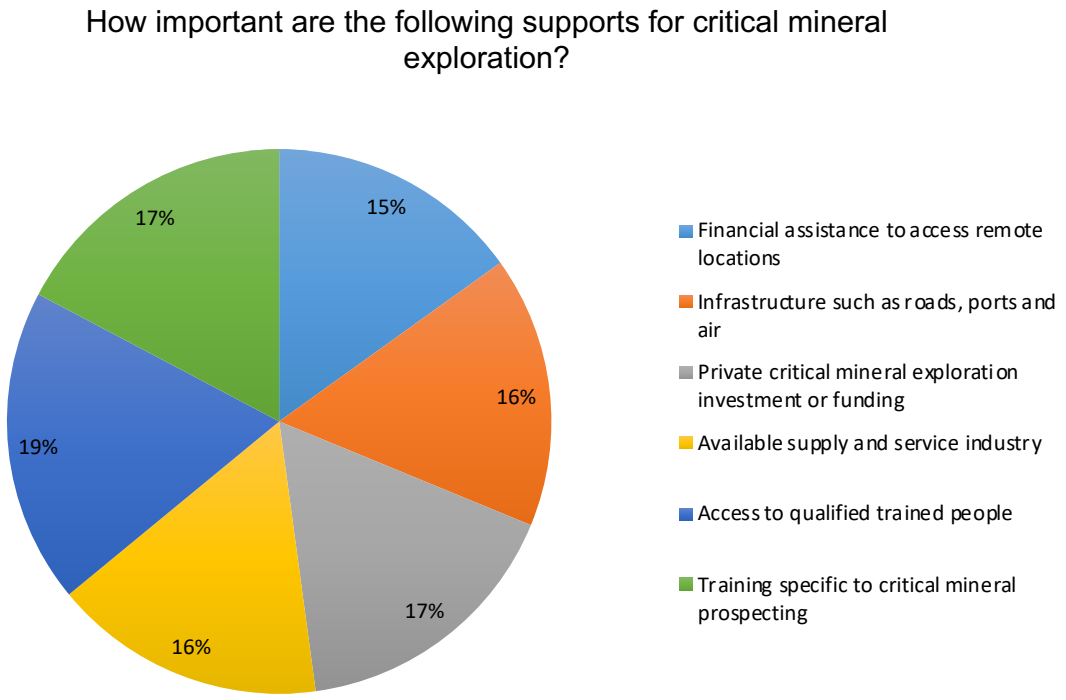


The department heard that some prospectors do not avail of funding because of the administrative requirements that are involved, such as interpretation and analysis of results. Participants also suggested an increase in funding and promotion of the program.

Some additional comments related to the existing prospector and junior exploration programming included:

- Provide more financial support to prospectors and junior explorers to provide fair value for their time and work.
- Ensure the quality of work and reporting is held to a certain standard to ensure the information produced is most effective in attracting investment.
- These programs should offer loans instead of grants.
- The Government needs to make it easier to access resources.
- Explorers should invest in their own resources.
- The funds would be better spent giving outreach to prospectors who attract large companies.
- The funds would be better spent outside of resource development.

In the questionnaire, participants ranked identified supports for critical mineral exploration as almost equally important (15 – 19 per cent). Participants saw access to qualified trained people as the most important support, followed closely by private critical mineral exploration investment or funding and training specific to critical mineral prospecting. Support for infrastructure such as roads, ports and air was tied with support for available supply and service industry. Participants also showed support for financial assistance to access remote locations. During engagement sessions, these supports were discussed and all were seen as necessary to unlock provincial critical mineral potential. For those in prospecting and exploration, both prospector grants and junior exploration assistance were noted as significant tools that encourage and support prospecting and exploration in Newfoundland and Labrador.



Investment Attraction

Online questionnaire participants were asked to choose their top three ways in which government could best communicate or promote Newfoundland and Labrador's critical mineral potential to attract investment. All four suggested responses received similar support from participants as seen below (21 – 25 per cent). Participants saw that geoscientific-specific news releases and publications as the best way government can communicate critical mineral potential and attract investment. This was followed closely by increased collaboration with industry and inter-governmental collaboration. Participants agreed that promotion at conferences and events is also a great way to communicate Newfoundland and Labrador's critical mineral potential to attract investment. Additional comments include:

- Attract investment by focusing on buyers.
- A partnership between the Government of Newfoundland and Labrador and Memorial University (geology and engineering programs) would attract investment.
- Promote worldwide to attract private investment.
- Promote Newfoundland and Labrador as a sustainable area that wants to manufacture and lead the way to a green economy.
- Work with local areas, organizations and people to help attract investment.
- Leverage social media, online surveys, advertising, schools, university and the radio to educate and create a travelling communication team to work in communities with active potential resources.
- Host recruiting events for exploration, development and producing companies.
- Promote all 23 critical minerals found in Newfoundland and Labrador at trade shows and conferences.

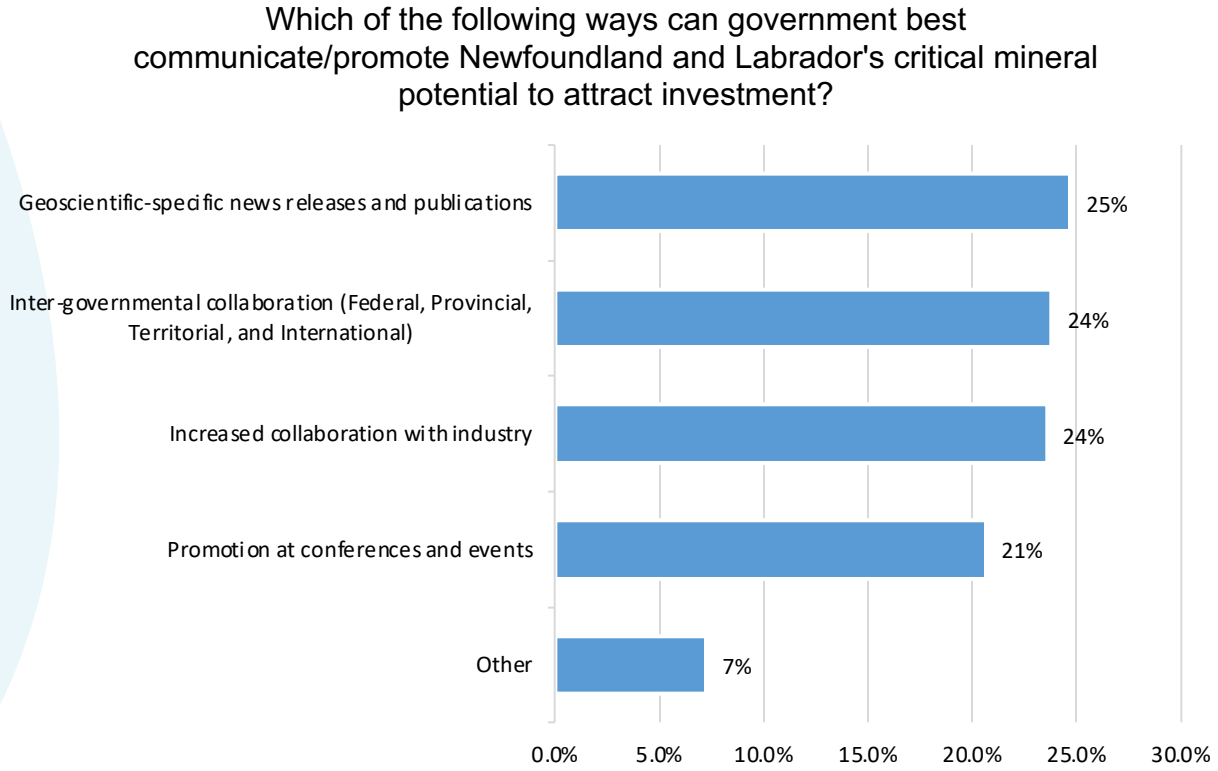
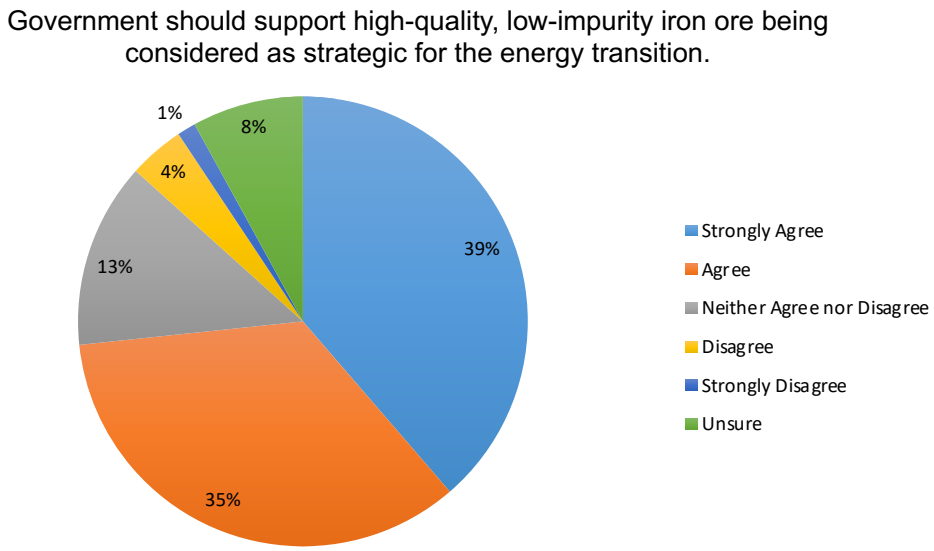


Photo credit - Iron Ore Company of Canada

Iron Ore and Other Minerals

The majority of questionnaire participants (74 per cent) strongly agreed or agreed that the Government of Newfoundland and Labrador should support high-quality, low-impurity iron ore being considered as strategic for the energy transition. Five per cent of participants disagreed or strongly disagreed with this. Few participants (13 per cent) neither agreed nor disagreed and the remaining eight per cent were unsure.

The department heard from individuals, organizations and companies who sent in written submissions and participated in sessions that high-quality, low-impurity iron ore should be listed as a strategic or critical mineral.



Some participants in the online questionnaire and written submissions advised that other minerals should be considered critical; as well, a focus needs to include the method in which the mineral is extracted. Others suggested that barite, beryllium, gold, selenium and silver are minerals that could also contribute to the green economy. Other comments included:

- As the technology that drives the green economy is constantly and quickly evolving, many minerals that seem to be insignificant now may soon become necessary, so we should put ourselves in a position to take advantage of these evolutions.
- It is important to have an understanding of the minerals found in Newfoundland and Labrador before considering if they are critical or not.

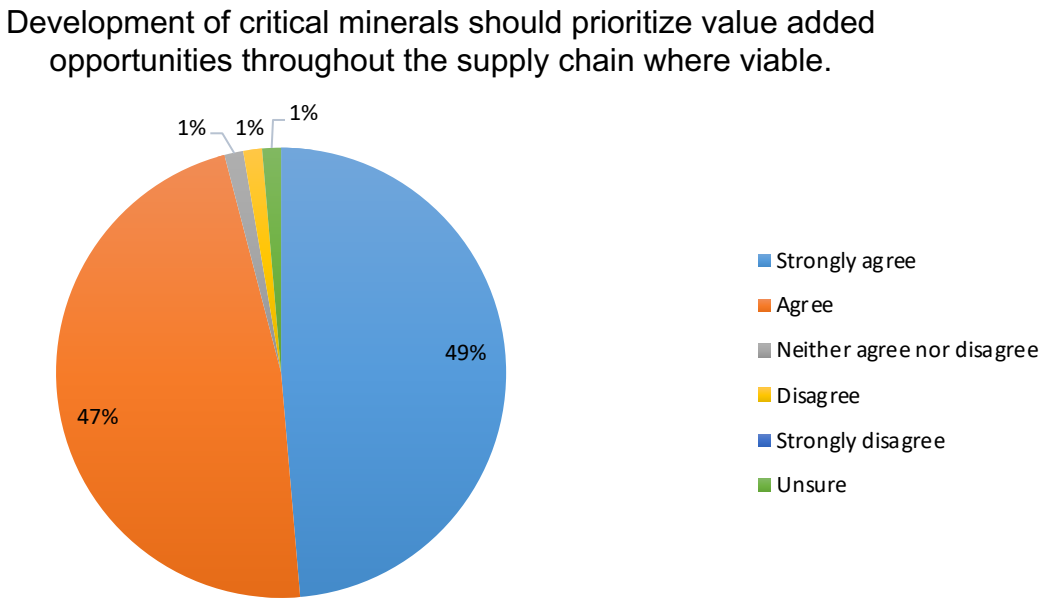
Additional comments related to unlocking our critical mineral potential include:

- Prospectors need support from a geologist and access to the Matty Mitchell Prospectors Resource Room.
- The Matty Mitchell Prospectors Resource Room needs equipment to test mineral samples on site.
- Invest in the most up-to-date online staking platform to eliminate ongoing technical problems.
- Relate exploration that occurs in the summer months to programs at post-secondary institutions to help with workforce challenges.
- Hire contract geologists to review the backlog of mineral assessment reports and put a 3-month time limit on the review of reports.
- Map the step-by-step procedure to help those who are new to prospecting (include how to complete paperwork such as reports and claims).
- People are power – a more educated population that understands the relevance of these minerals will lead to attracting more people to the industry, which would make a bigger difference than just contracting exploration companies to collect and share data.
- Provide prospecting rewards for geologists who find valuable mineral deposits in remote areas.
- Cost to access remote areas is concerning for prospectors.
- Create a citizen-science program to encourage those who are already in remote areas for other reasons such as hunters or hikers to participate in prospecting. These individuals could collect the rock sample and note the location using a GPS.

Maximizing the Value of our Critical Mineral Potential

Supply Chain Opportunities

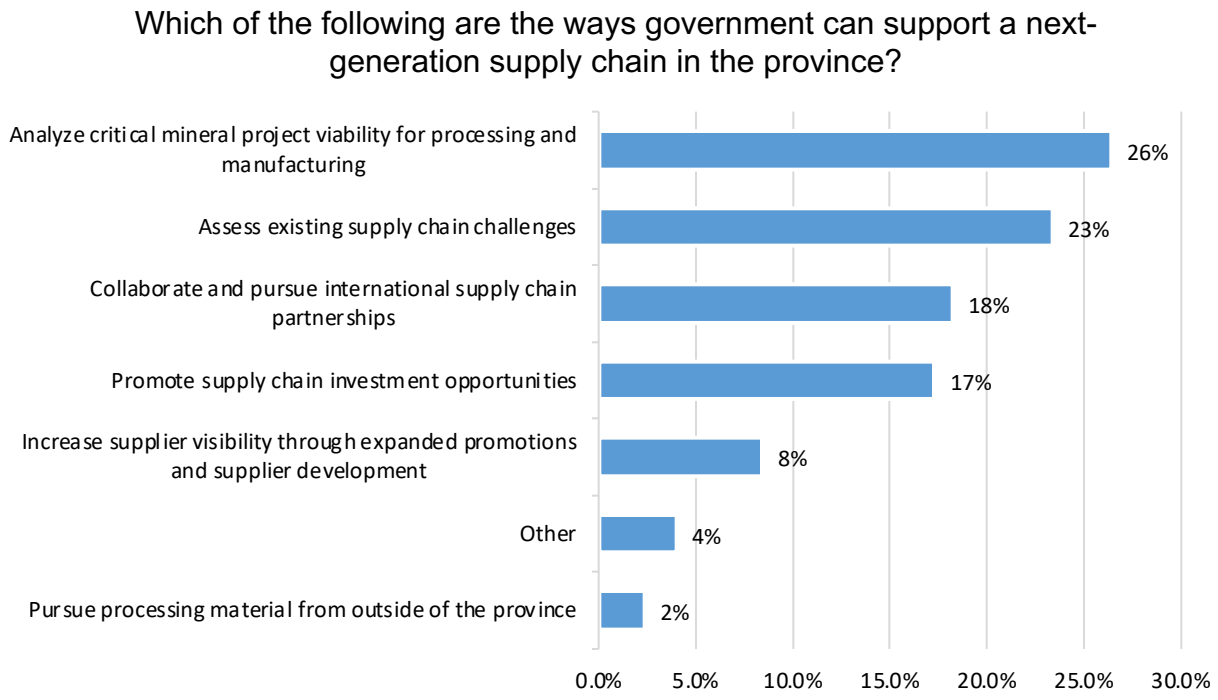
A large majority of participants in the online questionnaire (96 per cent) strongly agreed or agreed that the development of critical minerals should prioritize value added opportunities throughout the supply chain where viable.



When asked to choose the top three ways government can support a next-generation supply chain in the province, questionnaire participants most commonly selected analyzing critical mineral project viability for processing and manufacturing. The second most selected option is to assess existing supply chain challenges followed by collaborating and pursuing international supply chain partnerships. Seventeen per cent of participants suggested the fourth best way to support a next generation supply chain in the province is to promote supply chain investment opportunities. Some participants agreed to increase supplier visibility through expanded promotions and supplier development and few participants agreed that pursuing processing material from outside of the province could support a next-generation supply chain in the province. The remaining participants provided other comments, which are included below:

- Conduct a comprehensive analysis of the critical mineral supply chain, including identifying key dependencies, vulnerabilities and potential bottlenecks. This analysis can help prioritize investments and policy interventions to ensure a resilient and diversified supply chain for critical minerals.
- The development of the Critical Minerals Strategy should involve all stages of critical minerals from raw materials to final products within the province. This should include recycling and disposal strategies. All aspects would prioritize Newfoundland and Labrador benefits and societal development.
- Supply chains support development. Development requires access to lands for exploration and development.

- A successful exploration/development industry naturally supports satellite industries, including supply chains.
- Support market development initiatives to expand the demand and application of critical minerals. This includes promoting domestic consumption through incentives, fostering international trade relationships and encouraging the development of downstream industries that utilize critical minerals in innovative ways.
- Governments should be cautious with presumptions about the degree to which advancing toward a net-zero future will increase the demand for critical minerals.



Most participants (72 per cent) strongly agreed or agreed that they are comfortable with a processing or manufacturing facility being located in/near their community.

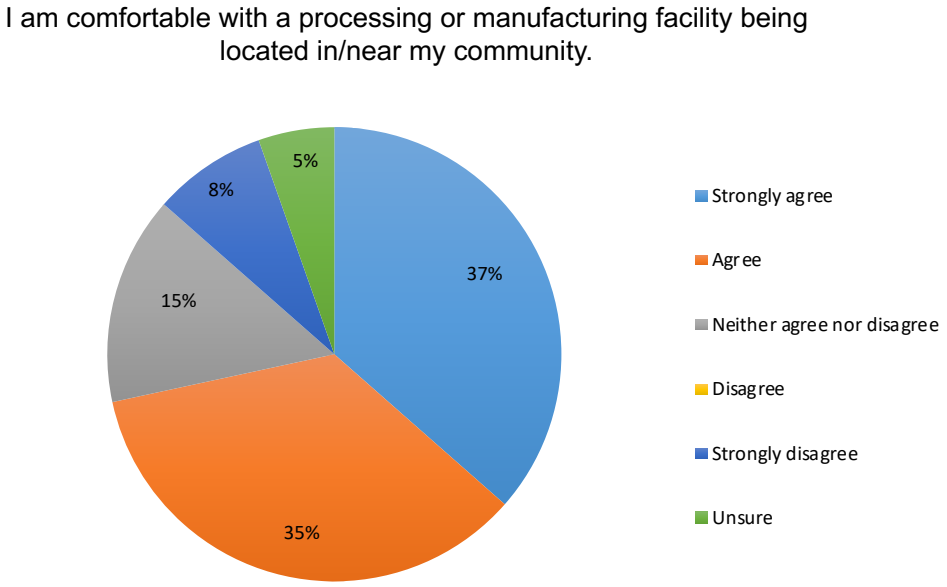


Photo credit - Vale Newfoundland and Labrador

Supply chains were discussed in written submissions as well as during the engagement sessions. The department heard that while downstream opportunities have potential, continuing to focus on upstream opportunities, even at the exploration stage, is important. Some individuals shared that we can determine what opportunities exist once we know which minerals are available. Other comments include:

- Newfoundland and Labrador needs a facility that can handle processing of rare earth elements, the post-secondary institutions could collaborate on this.
- The Government of Newfoundland and Labrador should facilitate communication with industry suppliers. A strategic relationship with an end user will help with funding.
- Create a database of diverse suppliers and establish reporting the number of contracts awarded to businesses majority owned by Indigenous Peoples and other underrepresented groups.
- Consideration of capacity supports for Indigenous partnerships in critical mineral supply projects, including at a minimum, business capacity, technical capacity, legal capacity, membership/community engagement capacity, education and permitting and regulatory capacity.
- Partnership opportunities for Indigenous Governments and Organizations should be made available at all stages of the critical mineral supply chain.
- Promote Indigenous Government's and Organization's human resources and services.
- Promote and encourage value added processing and manufacturing opportunities that are both economical and sustainable in the province.
- Need more power in numbers to help smaller mines start up quickly. Working together will help overcome the supply chain issues.

Innovation and Research & Development

When asked if opportunities to expand innovation and research and development capacity in the province should be pursued to facilitate critical mineral development, 90 per cent of online questionnaire participants strongly agreed or agreed. Five per cent of participants neither agreed nor disagreed with the statement provided. Two per cent of participants disagreed or strongly disagreed, and the remaining one per cent of participants felt unsure.

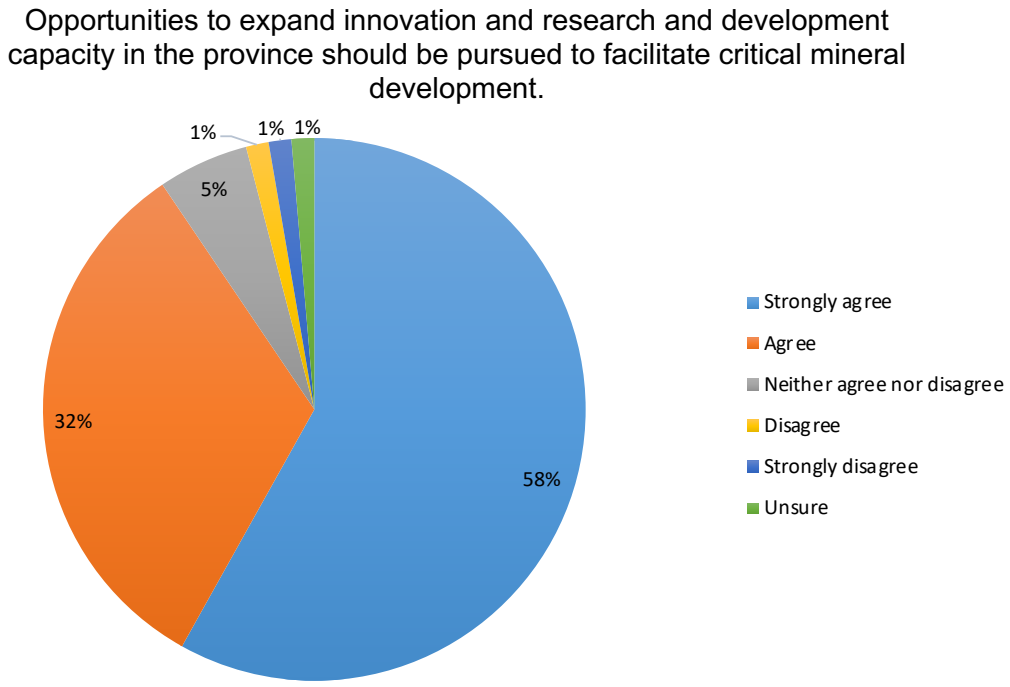
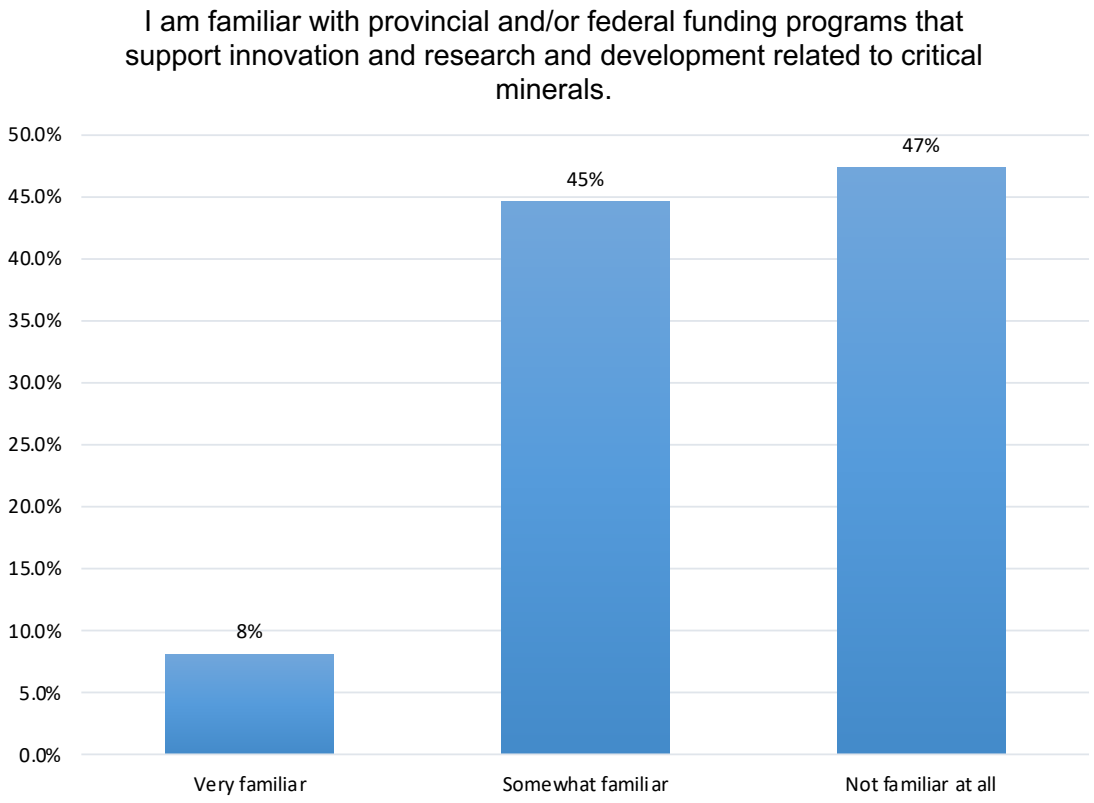


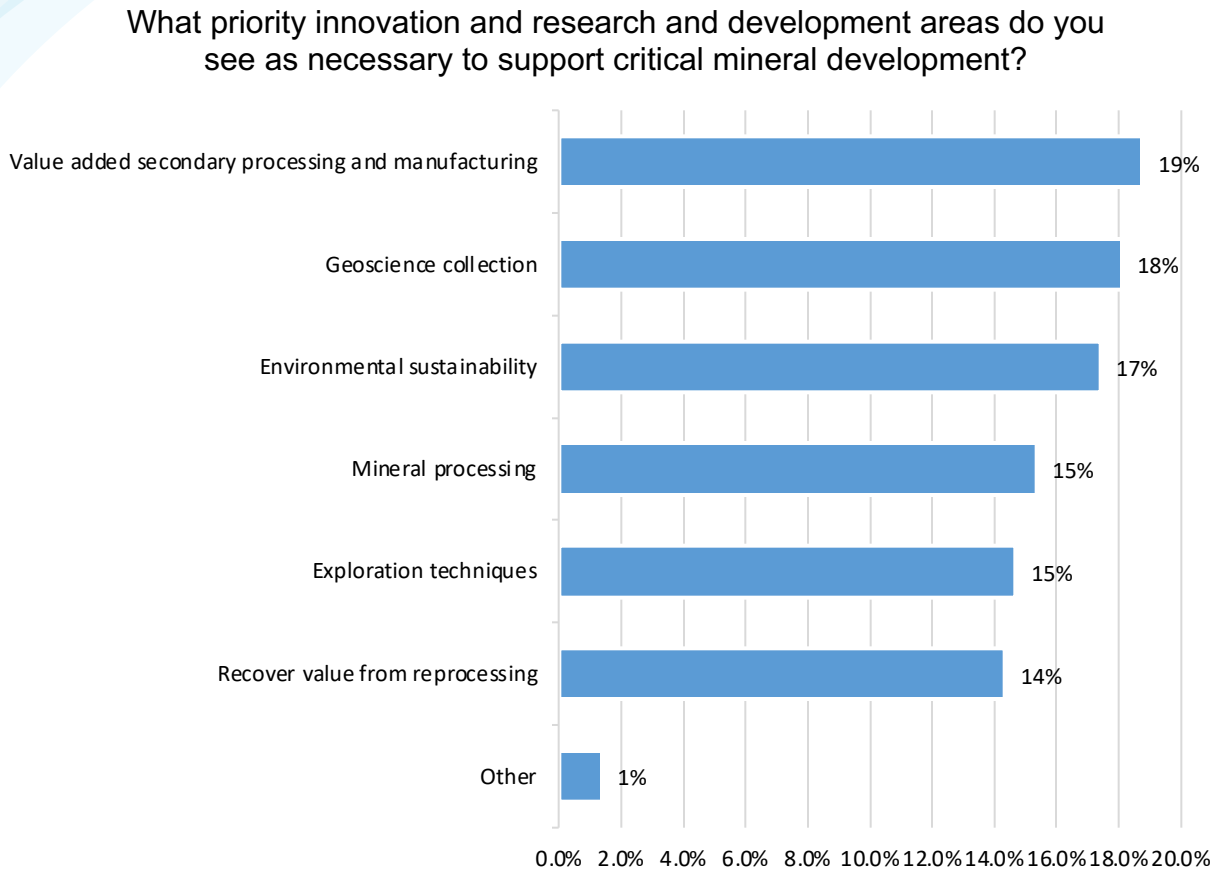
Photo credit - Matador

As seen below, fifty-three per cent of online questionnaire participants were very familiar or somewhat familiar with provincial and/or federal funding programs that support innovation and research and development related to critical minerals. The remaining 47 per cent of participants were not familiar.



When asked to select which priority innovation and research and development areas are necessary to support critical mineral development, all six areas received similar support (14 – 19 per cent). The top priority area was value added secondary processing and manufacturing, followed by geoscience collection. Environmental sustainability was seen as the third priority area. Mineral processing and exploration techniques were tied as the fourth priority area, followed closely by recovering value from reprocessing. The remaining one per cent shared additional priority areas including:

- Leverage genomics/bioleaching as well as using tailings is necessary to support critical mineral development.
- Critical economic analysis throughout the mining cycle and we need to prioritize resources (both public and private) to support critical mineral development.



The department received several comments during engagement sessions and from the written submissions in support of joint collaboration between Memorial University (MUN) and the College of the North Atlantic (CNA) in the area of critical minerals. Many participants supported the development of a hub or centre, such as:

- Joint collaboration between MUN, CNA and the New Brunswick Research and Productivity Council to create a facility in Newfoundland and Labrador.
- A centre, similar to the Centre for Social Responsibility in Mining at the University of Queensland, could exist with many partners.
- Look to Federal funding to support a MUN/CNA hub.

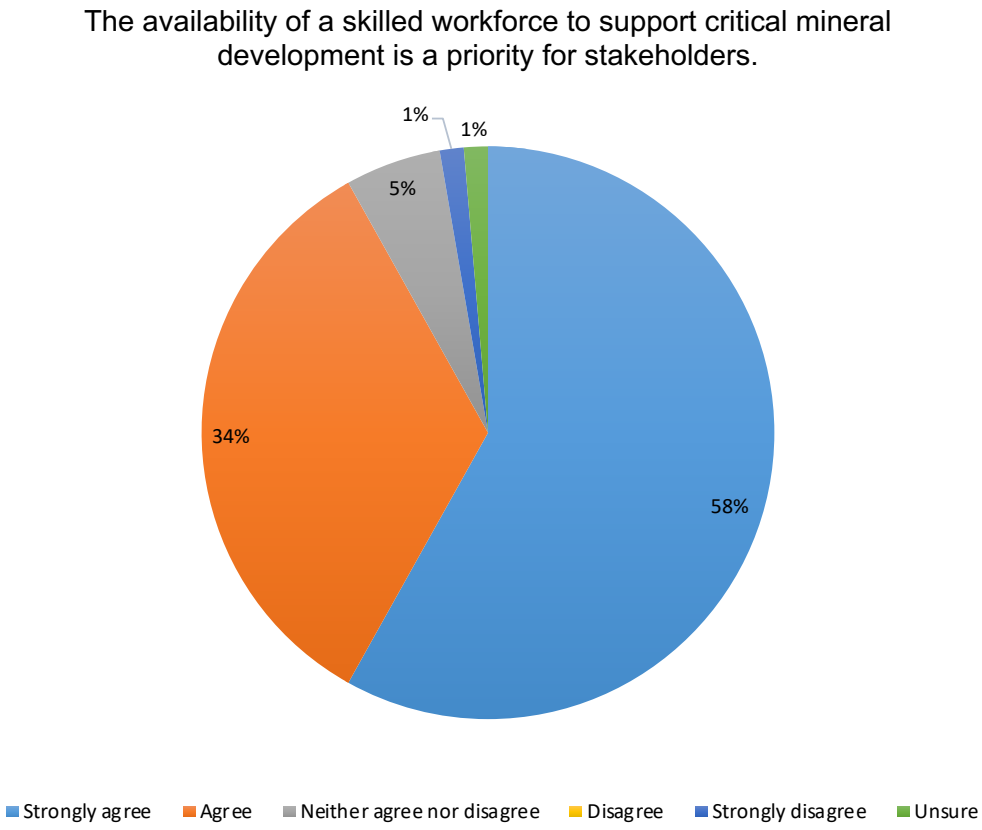
The participants stressed that the research and company goals need to be tied together and this type of collaboration will help shape the industry. It was also suggested that companies could create a research fund using revenue, and then post-secondary institutions could submit proposals. Mining companies could rank the research proposals and an overarching committee could award the funding. A program like this would create tight alignment between proposed research and industry goals. Other comments about innovation and research and development include:

- Have the Government of Newfoundland and Labrador facilitate the relationship between those in the field, existing resources and MUN/CNA.
- A joint collaboration between MUN Process Engineering, CREAIT analytical laboratory network and CNA Chemical Process Engineering Technology to investigate the metallurgy and greener processing of rare earth elements.

- Joint collaboration between MUN/CNA and industry to support the manganese project.
- MUN/CNA could have research students focused in the area of exploration.
- MUN/CNA should research how to deal with concentrate, as to reduce the cost of material movement.
- Governments could support companies that are engaged with and hiring geology students by funding a portion of the student's salary.
- Allocate funding for research and development initiatives focused on critical mineral exploration, extraction, processing and recycling. Investing in research and development supports technological innovation, process optimization and the development of sustainable mining practices, ultimately maximizing the value and efficiency of critical mineral projects.

Access to a Skilled Workforce

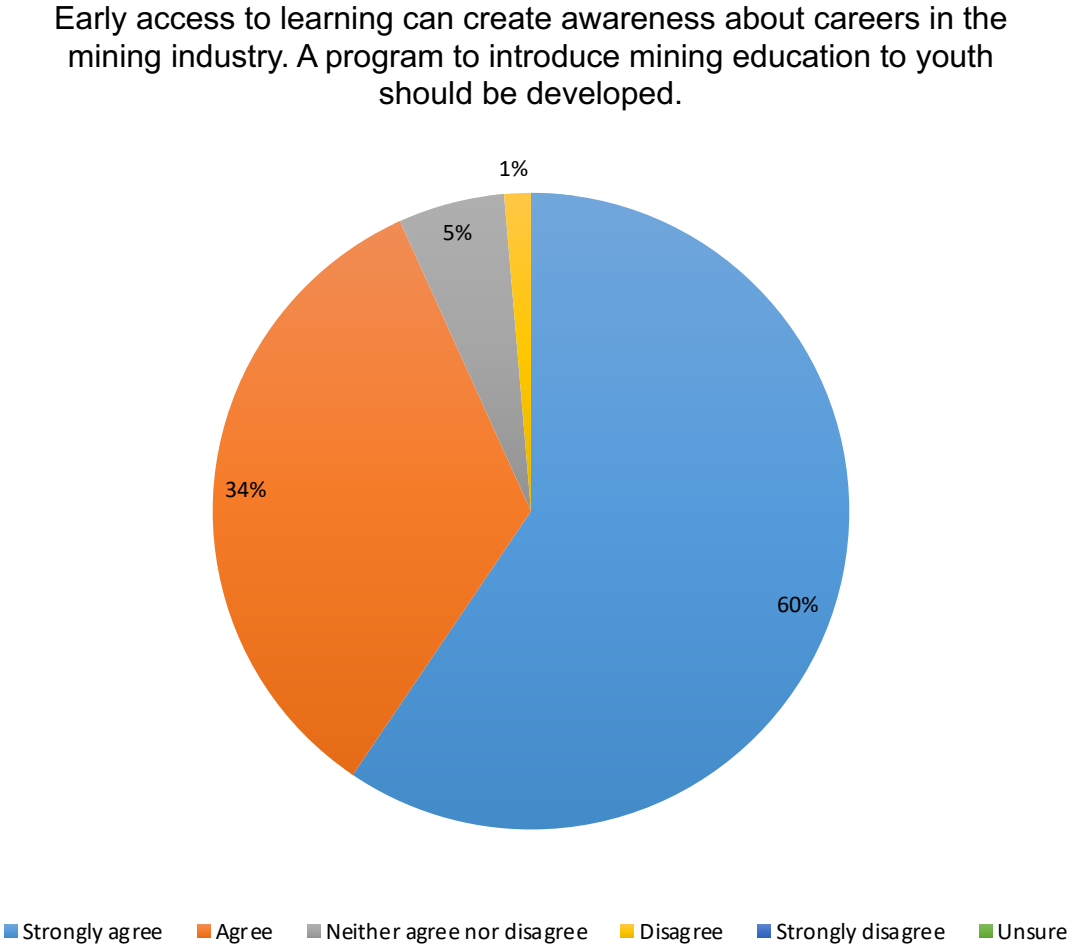
The majority of questionnaire participants (92 per cent) strongly agreed or agreed that the availability of a skilled workforce to support critical mineral development is a priority for stakeholders.



Participants in the engagement sessions and comments from written submissions also stressed the importance of having a highly skilled workforce. The department heard that a needs assessment must be completed to determine skill gaps. Participants shared that apprenticeship programs to provide hands-on training and mentorship for individuals interested in entering the mining sector are needed. Participants discussed professional development programs and opportunities for ongoing learning and upskilling. Others suggested fostering partnerships between industry, the Government and training organizations to better align training programs with industry needs.

Participants in the sessions and written submissions also stressed the importance to include a mining focus through immigration efforts. Participants shared that foreign credentials should be recognized in Newfoundland and Labrador and there should be new policies to attract foreign talent to move to Newfoundland and Labrador. Participants stressed that immigration is essential in securing the workforce of the future.

As demonstrated below, 94 per cent of online questionnaire participants strongly agreed or agreed that early access to learning can create awareness about careers in the mining industry and a program to introduce mining education to youth should be developed.



The department heard that mining education needs to begin in the K-12 school system. Participants shared that parents and teachers also need to be educated about the positive impacts of mining. Several participants suggested that high school students could be invited to a mining conference to learn more about the industry. Others suggested a pilot program to show youth the needs and possibilities during school visits. Some participants mentioned using technology to help introduce mining in the classroom by hosting virtual tours of facilities, talk to people in various types of jobs, use simulators or create virtual reality videos. The department heard that participants would like to see scholarships and grants created to encourage students, including girls and gender diverse youth to pursue mining related education and training. Some participants also suggested a high school program so students could have advanced study opportunities and earn hours towards their apprenticeship.

Other comments related to maximizing the value of our critical mineral potential include:

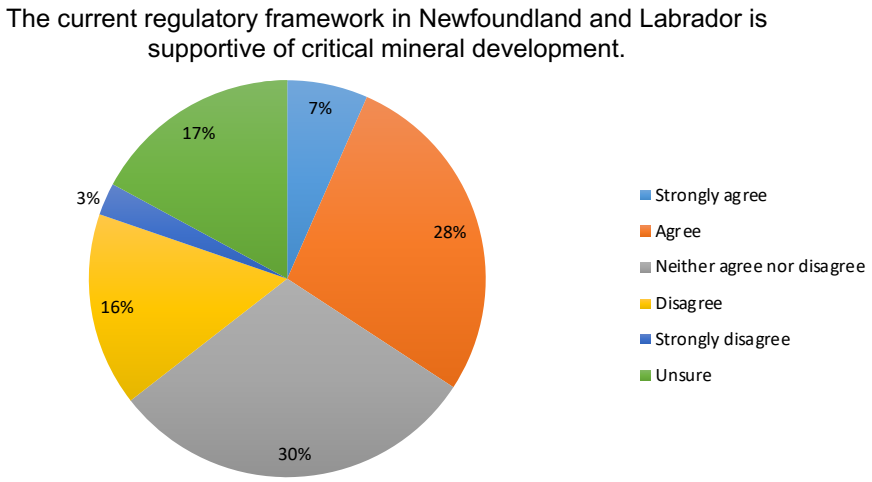
- Apply a GDEI (Gender, Diversity, Equity and Inclusion) lens to workforce development.
- Newfoundland and Labrador's stable, highly skilled workforce is a strategic asset and needs to be promoted.
- Include computer skills in the skilled trades programs and apprenticeships.
- Some Indigenous Governments and Organizations are interested in better utilizing provincial post-secondary institutions to meet their training needs.
- Launch targeted campaigns to raise awareness about career opportunities in the mining sector. Highlight the diverse range of roles and opportunities available, emphasize technological advancements, sustainability practices and the potential for career growth and international mobility.
- Actively promote diversity and inclusion in the mining sector to attract a wider pool of talent. Encourage women, Indigenous Peoples and other underrepresented groups to pursue careers in mining by implementing inclusive hiring practices, mentorship programs and support networks.
- Build employment partnerships. For example, in partnership with Indigenous Governments and Organizations, design a circular program to accomplish year-round opportunities for seasonal workers.
- Promote the mining sector's positive contributions to society, including its economic impact, technological innovation, environmental stewardship and social responsibility. Highlight sustainable mining practices and the industry's commitment to environmental protection and community engagement.
- The mining industry is not a secret so it is unnecessary to promote it as a viable career option.
- Open a school in Grand Falls-Windsor dedicated to mining, prospecting and exploration.

Photo credit - Vale Newfoundland and Labrador

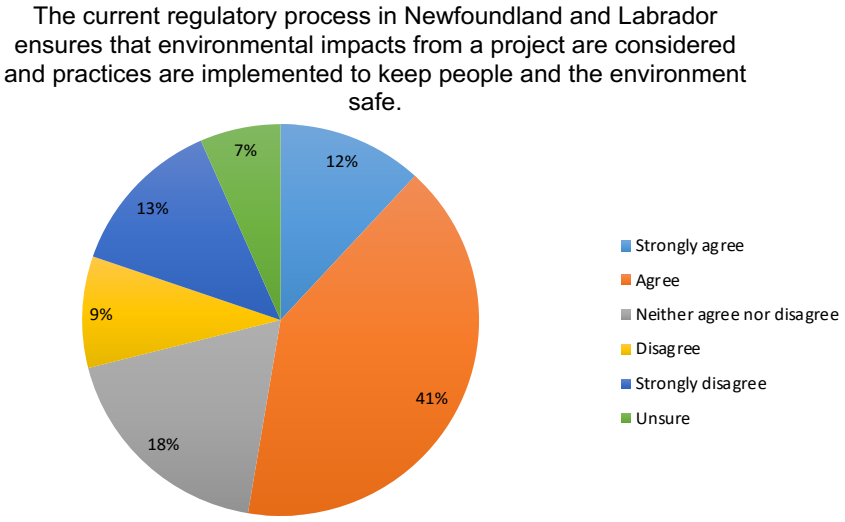
Supporting Project Development

Enhance Regulatory Framework

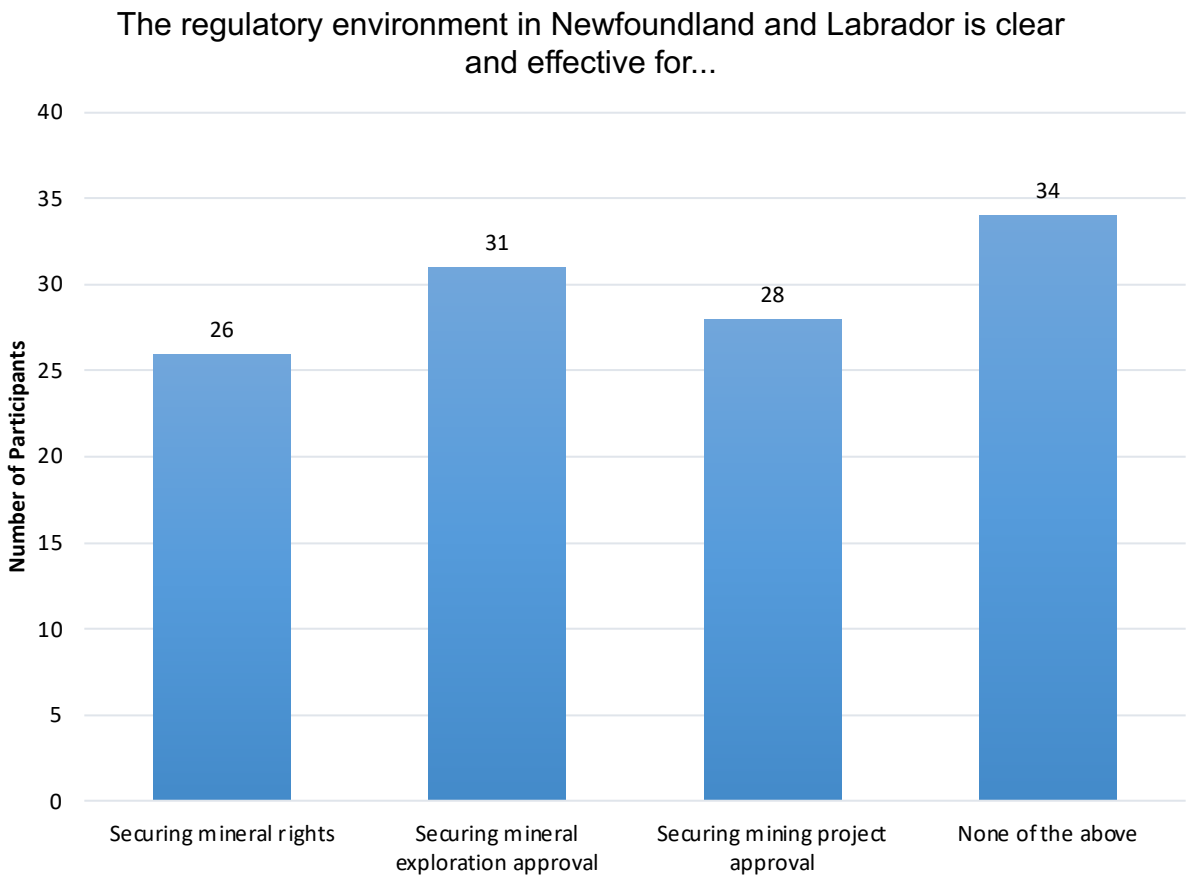
When asked if the current regulatory framework in Newfoundland and Labrador is supportive of critical mineral development, 35 per cent of questionnaire participants strongly agreed or agreed. Nineteen per cent of participants disagreed or strongly disagreed. Similarly, 17 per cent of participants were unsure and the remaining 30 per cent of participants neither agreed nor disagreed with the statement provided.



The majority of questionnaire participants (53 per cent) strongly agreed or agreed that the current regulatory process in Newfoundland and Labrador ensures that environmental impacts from a project are considered and practices are implemented to keep people and the environment safe. Twenty-two per cent of participants disagreed or strongly disagreed with the statement. Similarly, 18 per cent of participants neither agreed nor disagreed and the remaining seven per cent of participants felt unsure towards the statement provided.



Questionnaire participants were asked to select all that apply in response to the statement, “The regulatory environment in Newfoundland and Labrador is clear and effective for which of the following.” There were mixed responses as 26 participants agreed that the regulatory environment in Newfoundland and Labrador is clear and effective for securing mineral rights. Similarly, 28 participants selected securing mining project approval. Thirty-one participants selected securing mineral exploration approval is clear and effective. The slight majority of participants responded that the regulatory environment in Newfoundland and Labrador is not clear or effective for securing mineral rights, mineral exploration approval or mining project approval.



The department heard from many participants during the engagement sessions and in written submissions that it would be helpful to streamline the various permitting processes by simplifying permitting procedures, environmental assessments and land access requirements. Some participants suggested that mapping the requirements would be helpful. Other comments include:

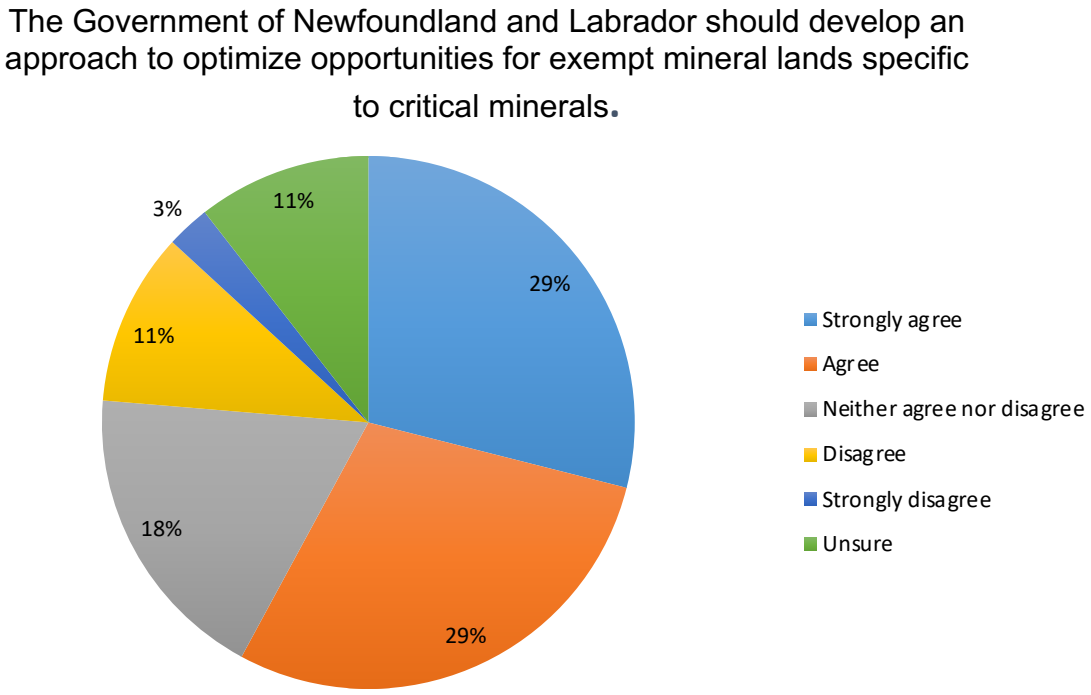
- The regulatory framework should provide clear guidelines and regulations that are easily understandable and accessible to all stakeholders. Transparency in the permitting process, regulatory requirements and compliance standards is crucial for fostering investor confidence and ensuring a level playing field for all participants.
- Clarify and improve how Crown Lands are managed.
- The Labrador Inuit Settlement Area and Labrador Inuit Lands have an abundance of unlocked mineral potential that could be accessed when the Regional Land Use Plan for the Labrador Inuit Settlement Area is finalized.

Assessing regulatory gaps specific to critical minerals was also discussed in sessions and written submissions. Participants shared that the regulatory framework should incorporate robust environmental and social

safeguards to minimize the negative impacts of critical mineral development. Others discussed that regulatory framework and environmental impacts of rare earth elements need to be explored. Some participants discussed the length of time to go from concept to licensing can take five to 10 years so this must be shortened. Several participants indicated that the regulatory framework should encourage meaningful stakeholder engagement with local communities, Indigenous Governments and Organizations, industry representatives, environmental organizations and other relevant stakeholders. Other comments included:

- Consider providing incentives for companies that meet or exceed compliance requirements in terms of sustainability, environmental stewardship and social responsibility. This can encourage companies to adopt best practices and drive the industry towards more responsible and sustainable operations.
- Foster international cooperation and harmonization of regulatory frameworks to facilitate responsible and sustainable critical mineral development. Collaboration with other jurisdictions can help align standards, share best practices and streamline cross-border projects.
- Profits made from mineral development and extraction should directly support and enhance the lives and communities of Newfoundland and Labrador.
- Ensure the regulatory framework is dynamic and subject to regular review and adaptation.

As seen below, when asked if the Government of Newfoundland and Labrador should develop an approach to optimize opportunities for exempt mineral lands specific to critical minerals, 58 per cent of questionnaire participants strongly agreed or agreed.



In the engagement sessions and written submissions, the department heard from many participants who stressed that there are high potential exploration areas classified as exempt mineral lands and these must be unlocked to advance critical mineral opportunities. Some participants recommended that the Government of Newfoundland and Labrador should adopt a multiple land use policy, to prevent high potential critical mineral land from going unexplored. Other participants recommended that the Provincial Government could work with Indigenous Governments and Organizations, and academic institutions to further the understanding of exempt mineral lands.

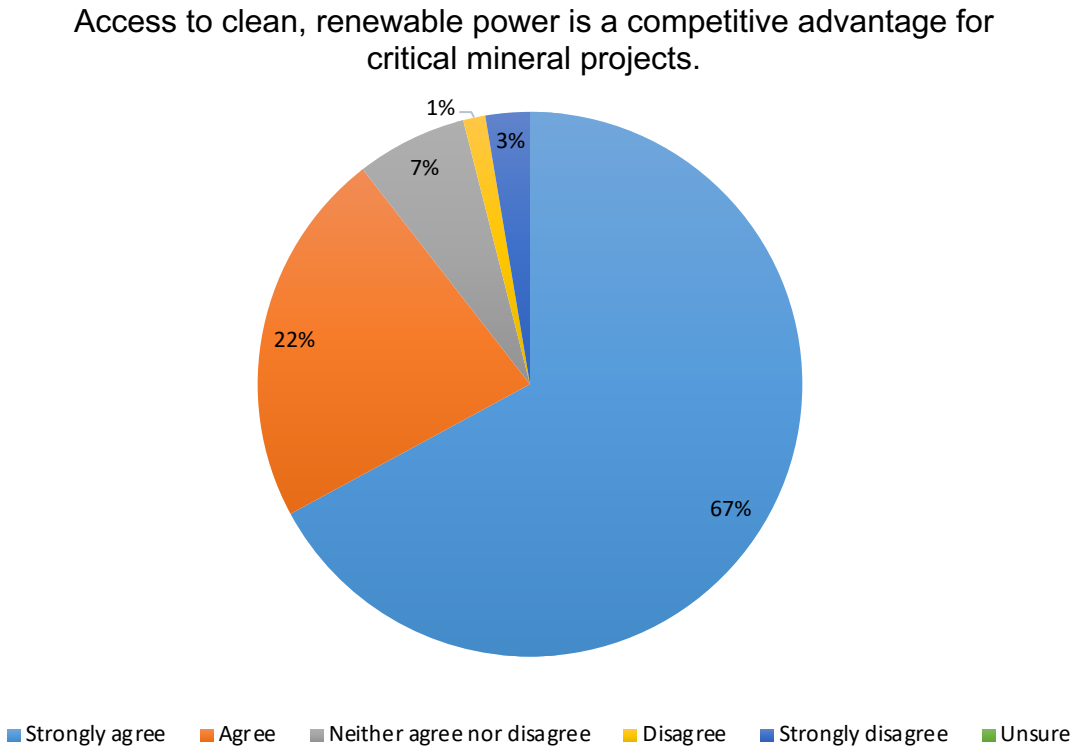
Other comments related to regulatory framework include:

- Streamline the management of the mineral land tenure system.
- Provide project-management support and inter-ministry coordination in partnership with Indigenous Governments and Organizations for regulatory approvals.
- Some Indigenous Governments and Organizations suggested that there should be an agreement on benefits prior to sanctioning a project.
- Use models from other jurisdictions to address the barrier of having vastly different priorities, circumstances, capacity and resources for Indigenous Governments and Organizations.
- Creating successful partnerships in mining projects necessitates sustainable Indigenous communities including access to clean water, safe housing, accessible health care or quality education to address the barrier of socio-economic circumstances in communities.
- The Government of Newfoundland and Labrador must better understand the cumulative effects of resource development before advancing new mining projects.
- The Strategy should reflect the Aboriginal Duty to Consult where asserted or settled rights may be adversely impacted.
- Newfoundland and Labrador's Critical Minerals Strategy should use FPIC (Free, Prior, Informed Consent) as a guiding principle in developing partnerships with Indigenous Governments and Organizations in the province.
- Newfoundland and Labrador's Critical Minerals Strategy should incorporate aspects of the First Nations Major Project Coalition (FNMPC) report to address environmental and other concerns for Indigenous Governments and Organizations in this sector.
- Ensure there is a balance between regulations and economic encouragement.
- Renewable terms should align with other jurisdictions where mineral claims can be maintained as long as work expenditures or cash-in-lieu requirements are met.
- Encourage the adoption of innovative technologies and best practices in critical mineral development through the regulatory framework.

Photo credit - Benton Resources Exploration

Strategic Infrastructure

The majority of questionnaire participants (89 per cent) strongly agreed or agreed that access to clean, renewable power is a competitive advantage for critical mineral projects.



The department heard from various participants in the engagement sessions and written submissions that many areas need access to more power capacity. Participants stressed that investing in infrastructure development to enhance accessibility and reduce logistical challenges in remote and unexplored areas is needed. Few participants, including some Indigenous Governments and Organizations, suggested that industry could work with remote, coastal communities to transition from a diesel grid to an affordable and reliable supply of clean electricity. Many participants suggested that the Government of Newfoundland and Labrador should focus on developing or upgrading our transportation infrastructure including roads, railways, ports and airports to facilitate the efficient movement of critical minerals from mining sites to processing facilities and export markets. Several participants discussed creating resource roads could help prospectors access more remote areas. Other participants suggest a road to Nain could help open Labrador for development and prospecting, however environmental considerations and consultation would be necessary. Few participants shared that proponents should build their own roads, bridges and power lines. Other comments include:

- Investing in energy infrastructure, such as power generation facilities and transmission lines, supports energy-intensive mining and mineral processing operations.
- Developing water management infrastructure, such as dams, pipelines and water treatment facilities, can ensure a reliable and sustainable water supply for mining operations while addressing environmental considerations and water conservation.
- Build facilities close to the mine to help mitigate impacts such as poor road conditions.
- Before building a processing facility, local infrastructure may need to be upgraded.

- Enhance communication services and digital infrastructure in Newfoundland and Labrador.
- Invest in social infrastructure such as housing, healthcare, education and community. For example, housing is a major barrier in Labrador West.
- Develop infrastructure for recycling and waste management.

Other comments related to supporting project development include:

- Production of renewable hydrogen for use in making finished product direct reduction pellets in Labrador West.
- The Provincial and Federal Governments should work together to identify viable projects that can be accelerated by financial and technical de-risking.
- Provide information on marketing intelligence.
- Foster International collaboration and partnerships to share best practices, align standards and promote sustainable and responsible critical mineral development. Engaging with other countries, international organizations and industry stakeholders can facilitate knowledge exchange, reduce duplication of efforts and promote a global approach to critical minerals.

Additional Input

Funding

The department heard from many participants in the engagement sessions and written submissions that funding is necessary. Some participants asked for a roadmap of potential funding opportunities from all sources, including steps of development in terms of advancing commercialization. Several participants shared that there should be a Provincial tax incentive that builds on the Federal Critical Mineral Exploration Tax Credit. Others suggested an increase in both funding and person power to support and expand existing capabilities in the departments to consolidate image interpretation and mapping required across departments. Various participants suggested that the Government of Newfoundland and Labrador should offer a tax break to prospecting companies who spend a certain amount of money in Newfoundland and Labrador, or to people who move back to Newfoundland and Labrador to work in the industry. Other comments related to funding include:

- Provide funding for research and development initiatives related to critical mineral exploration including support academic institutions, research organizations and technology providers.
- The Newfoundland and Labrador Critical Minerals Strategy must be accompanied by a Newfoundland and Labrador Indigenous Loan Guarantee Program to back Indigenous participation in the critical mineral supply chain.
- The Provincial Government should invest in the mineral sector.
- The Provincial Government should invest in developing a Mining and Mineral processing Centre in the province.
- The Provincial Government should provide support to industry associations to help fulfill their

mandates.

Additional comments to help inform the Critical Minerals Strategy are included below:

- A Critical Minerals Strategy must more strongly accentuate engagement, partnership and economic benefit arrangements with Indigenous Governments and Organizations with permitting and sanctioning adhering to the successful integration of these policies.
- The Critical Minerals Strategy should reflect the increasing and beneficial role that Indigenous Governments and Organizations are playing in all levels of development in Newfoundland and Labrador.
- Participants shared that the Government of Newfoundland and Labrador must strengthen relationship processes with the Indigenous Governments and Organizations to ensure continued critical mineral dialogue.
- Consider press releases in partnership with Indigenous Governments and Organizations to showcase that deliverables have been met and how the Province plans to continue to meet them in the future.
- Some Indigenous Governments and Organizations encouraged the development of a process for engagement and collaboration on critical mineral development within the province.
- Ensure meaningful stakeholder engagement throughout the Strategy development and implementation process. Engage with industry, local communities, Indigenous Governments and Organizations, environmental organizations and other relevant stakeholders to address concerns, incorporate diverse perspectives and foster a sense of ownership and shared responsibility for sustainable critical mineral development.
- Establish robust monitoring and reporting mechanisms to track the progress and impact of the Critical Minerals Strategy. Regularly assess and report on key indicators such as exploration activities, production volumes, sustainability performance and socio-economic contributions. This allows for adaptive management and the identification of areas requiring further intervention or support.
- Share current and expected world demand for various minerals.
- Ensure that the Critical Minerals Strategy is subject to periodic evaluation and adaptation based on emerging trends, technological advancements and changing market dynamics. Regularly assess the Strategy's effectiveness, identify areas for improvement and update policies accordingly.
- It is important to have an understanding of the minerals present in Newfoundland and Labrador whether they are considered green or not. As technology that drives the green economy is constantly and quickly evolving, many insignificant minerals may soon become necessary and so, we should put ourselves in a position to take advantage of these evolutions. Attracting private investment is key.
- Must recognize the traditional, cultural, environmental and economic importance of the land, water, air, fauna and flora to Indigenous Peoples, and facilitate its members and member businesses to provide input into the project and to be beneficiaries of the project.
- We need to look at the long-term human and environmental impacts all along the supply chain and weigh those aspects out as well.
- Promote and align with the Mining Association of Canada's "Toward Sustainable Mining" framework, which would encourage operators in Newfoundland and Labrador to disclose their environmental, social and governance (ESG) processes and performances in annual reports.
- The Province should consider primary ESG factors; environmentally responsible exploration, development and extraction; socially responsible exploration, development and extraction; and

governance.

- Integrate stringent environmental and social standards into the Strategy to ensure responsible and sustainable critical mineral development. Consider adopting internationally recognized standards and certification systems to guide environmental impact assessments, community engagement, labor practices and reclamation and closure planning.
- The government must develop and apply an effective ESG strategy at every stage.
- We still need to uphold protection of the environment, including in areas with migratory or sedentary caribou.
- Environment should be a focus area of the Strategy.

Conclusion

The Department of Industry, Energy and Technology would like to extend a sincere thank you to everyone who participated in the questionnaire, engagement sessions and provided written input. Individuals from all sectors of the mineral industry, members of the public and Indigenous Governments and Organizations offered important insights that will be of invaluable help to the Provincial Government in its development of a critical minerals strategy. The information gathered through this process will be carefully considered, as the department moves forward with developing a critical minerals strategy.


Newfoundland
&
Labrador