

Digging Deeper: Exploring Social Sustainability Reporting in the Canadian Gold Mining Industry

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MScSM

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Background Analysis

Importance of Mining

- With the increasing dependence on technology in our ever-changing digital world, the mining industry continues to play a prominent role in the global economy¹.
- Without proper management, mining can lead to environmental degradation, increased conflict, displacement of communities and other challenges of inequality².

Gold Mining in Canada

- Gold is a precious metal and the most valuable mined commodity in the Canadian economy, with a production value of \$12.3 billion in 2020³.

Industry Reporting

- Over the past decade, mining companies have begun reporting on their sustainability performance in addition to their financial performance, highlighting a new focus of their business strategy⁴.

The Sustainable Development Goals and mining

- Mapping Mining to the Sustainable Development Goals: An Atlas* maps the relationship between mining and the SDGs by identifying best practices, existing initiatives and resources that companies can make valuable contributions to the global good².

Social Sustainability in the gold mining industry

- There are significant deficiencies in data reporting on the social impacts of the gold mining industry⁵.
- While the potential for social issues due to gold mining is well known, the impacts at an industry level on host nations and communities are poorly understood⁵.
- Historic social issues include revenue mismanagement, community displacement, and lack of representation industry-wide⁵.

Research Questions

- What actions are Canadian gold mining companies taking to address social inequality?
- How do the companies compare to each other?
- As an industry, which of the identified goals are well represented in reporting and which are not?
- What can the identified companies learn from each other?

Methods

SDG:	Main theme	Search Terms
	Local Community	Local OR locally Community OR communities' OR communities
	Women Gender Inclusivity Diversity	Women OR female Inclusion OR inclusive Diversity OR diverse
	Marginalized, underrepresented Local procurement	Representation Procurement OR Procured OR procures OR procuring
	Grievance Conflict-free Indigenous Human rights	Grievance Conflict-free Indigenous Human rights or human right

Selected Companies:



Part 1:

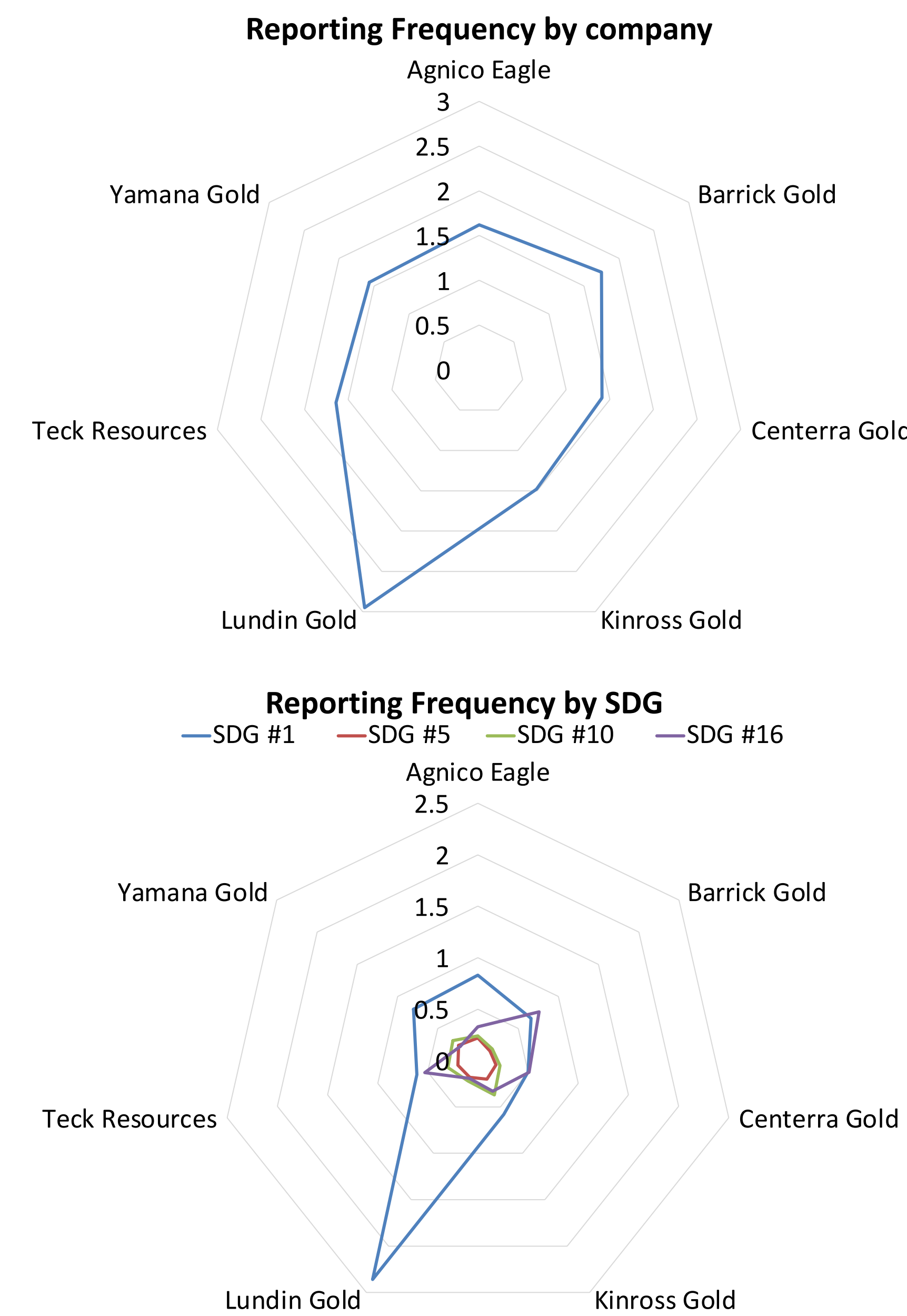
- Using NVivo, the 2021 sustainability reports of all seven companies were analyzed for the presence of the search terms above.
- The presence of each search term was expressed as a percentage of the report that these terms cover.
- Radar plots were created for analysis.

Part 2:

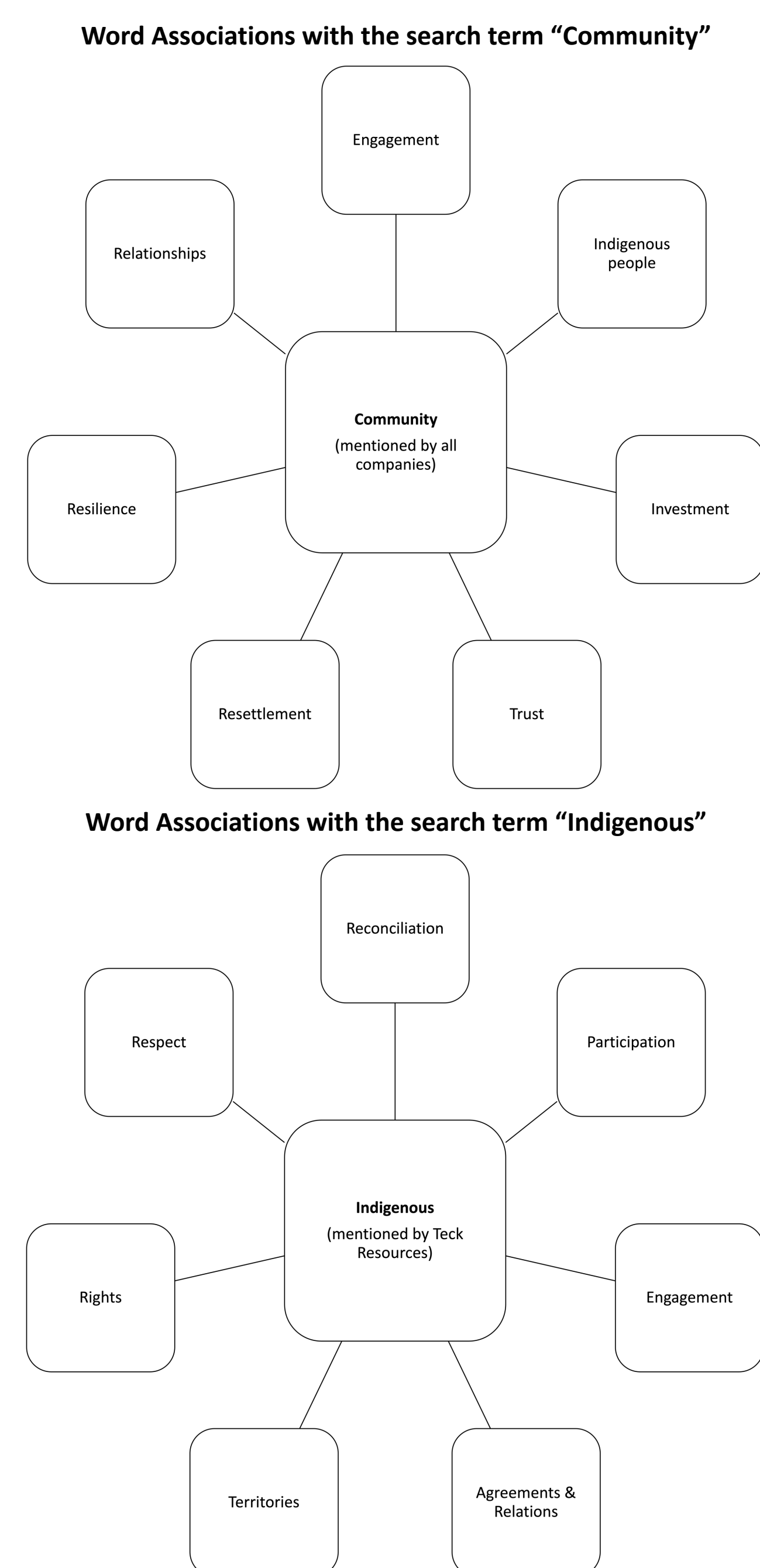
- Using NVivo, the top 20 words used in each report were identified.
- The top 20 words used by each company were matched to the search terms in the table above to identify the connection between the social SDGs and the top 20 words.
- Word trees were created to understand the context in which the search terms were used.

Results

Part 1:



Part 2:



Key Findings

Part 1:

Clear gaps in reporting exist across companies:

- Lundin Gold ranked highest of all seven companies on reporting according to the criteria.
- Centerra Gold ranked the lowest of all seven companies on reporting according to the criteria.

Clear gaps in reporting exist between SDGs:

- SDG #1 was the most reported
- SDG #16 was the second most reported
- SDG #10 was the third most reported on
- SDG #5 was the least reported on

Part 2:

Search Term: Community

- All seven companies had this term mentioned in the top 20 used words.
- Indicates that this is an area of priority across the Canadian gold mining industry.
- This search term is strongly associated with SDG #1.

Search Term: Indigenous

- Only Teck Resources had this term mentioned in its top 20 used words.
- Indicates that this is an area lacking attention across the Canadian gold mining industry.
- This search term is strongly associated with SDG #16.

Recommendations

- The industry has the power to have a positive social impact on the communities in which they operate; however, there is no single solution
- Companies must continue shifting their foci and driving an industry-wide transformation to capture the value of acting upon social issues and implementing social initiatives.
- Companies must work to implement unique strategies that align with the intentions and goals of the community in which they operate.
- Companies must learn from the unique initiatives and approaches others have implemented to drive progress in the industry.
- By increasing the reporting on the discussed SDGs, companies can improve their social sustainability performance and foster a more socially responsible mining sector for the future.

Future Research

- Analyzing multiple years of reports could capture a more comprehensive overview of the progress of social sustainability in the industry and indicate the varying focus of the industry over time.
- Evaluate the validity of the reported actions by the companies and the effectiveness of each action in helping achieve the SDGs.

Key References

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