

# *Mining with Principles:* Stakeholder Perceptions towards Mining Industry: Opportunities & Challenges

*Webinar based on ICMM 2017 Industry Stakeholders Opinion Survey*

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# Introduction



**Tom Butler**  
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CEO  
*GlobeScan*



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Manager, Research  
*ICMM*

# Agenda

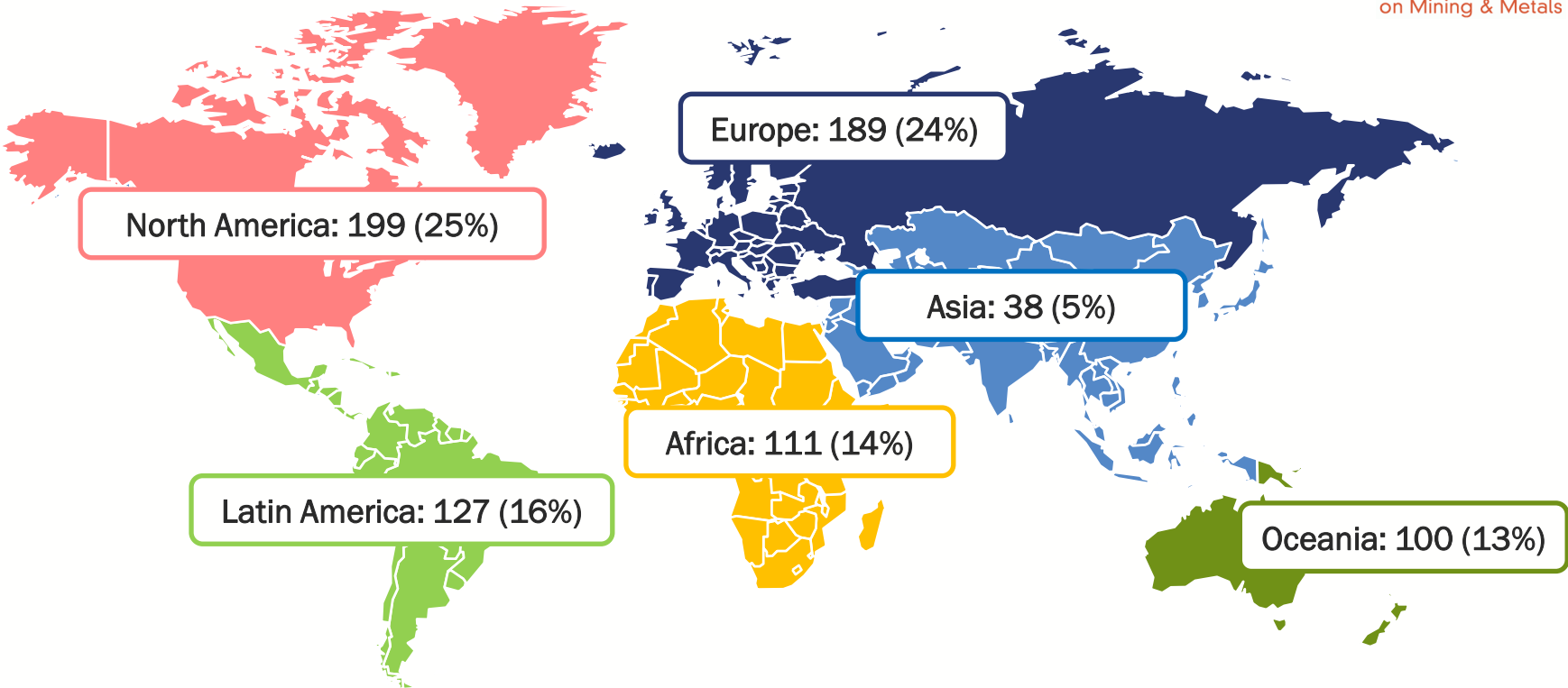
- Introductions (5 mins)
- ICMM 2017 Industry Stakeholders Research – Overview of Key Findings (20 mins)
- Broadening the Conversation on the State of the Industry (10 mins)
  - Reflections from Tom Butler
  - ICMM's pilot communication campaign: Mining with Principles – Fernanda Diez
- Q&A Session (20 mins)

# Objectives

- To explore and track latest perspectives on opportunities and challenges facing the sector
- To measure differentiated perceptions of the industry and of ICMM members
- To understand the main drivers of favourable perceptions towards ICMM member companies
- To have a baseline measurement of ICMM's vision for the industry, and of the association's progress in fulfilling that mission
- To assess the perceived value of mining to society, and weigh the potential benefits of different areas of contribution

Online survey of ICMM's stakeholder network, conducted in English between February and March 2017.

# 800 Stakeholders – Breakdown by Group and Region\*



\*Nearly 4 per cent of stakeholders did not provide region demographics, and 5 per cent did not categorise their stakeholder group.

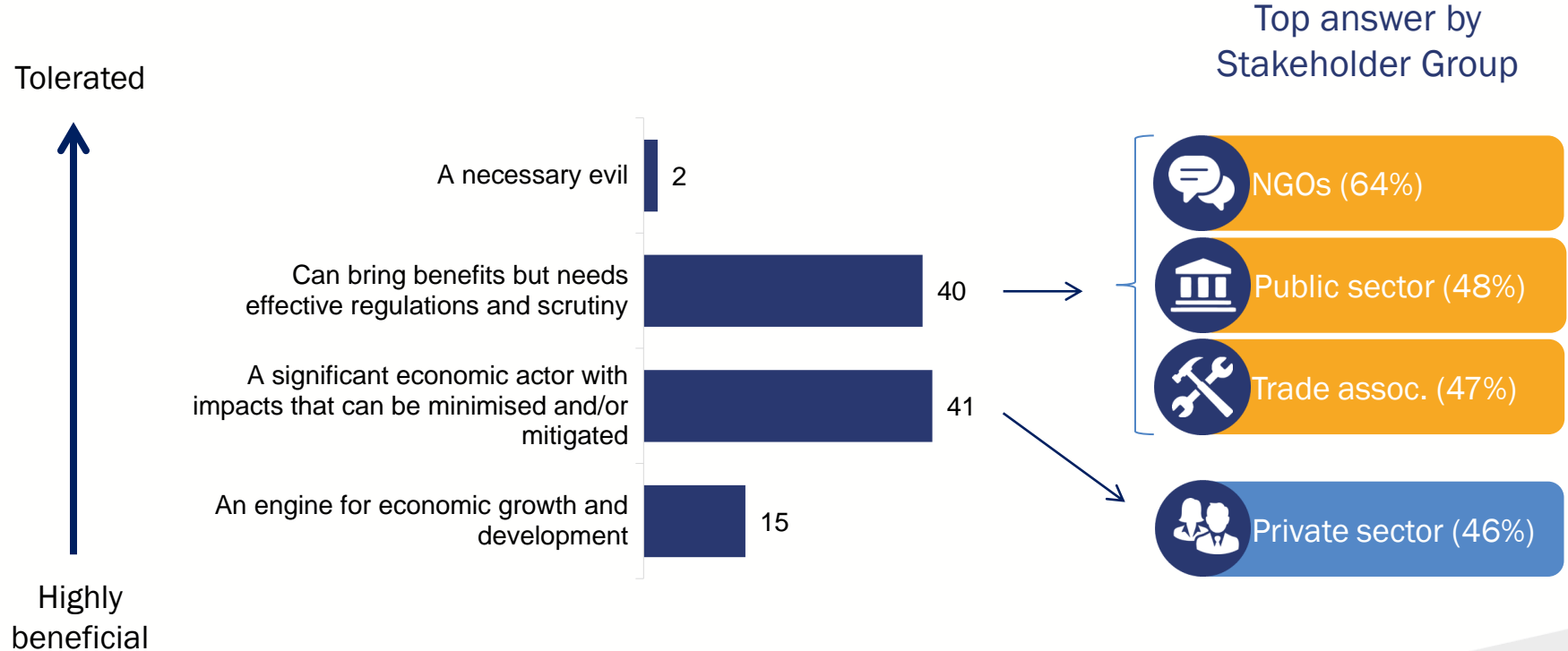
Private sector	Public sector	Academia	Trade associations	NGOs	Media
482 (60%)	76 (10%)	104 (13%)	33 (4%)	55 (7%)	8 (1%)

# Key Findings

# Views of Mining

## Best Description of Views of Mining

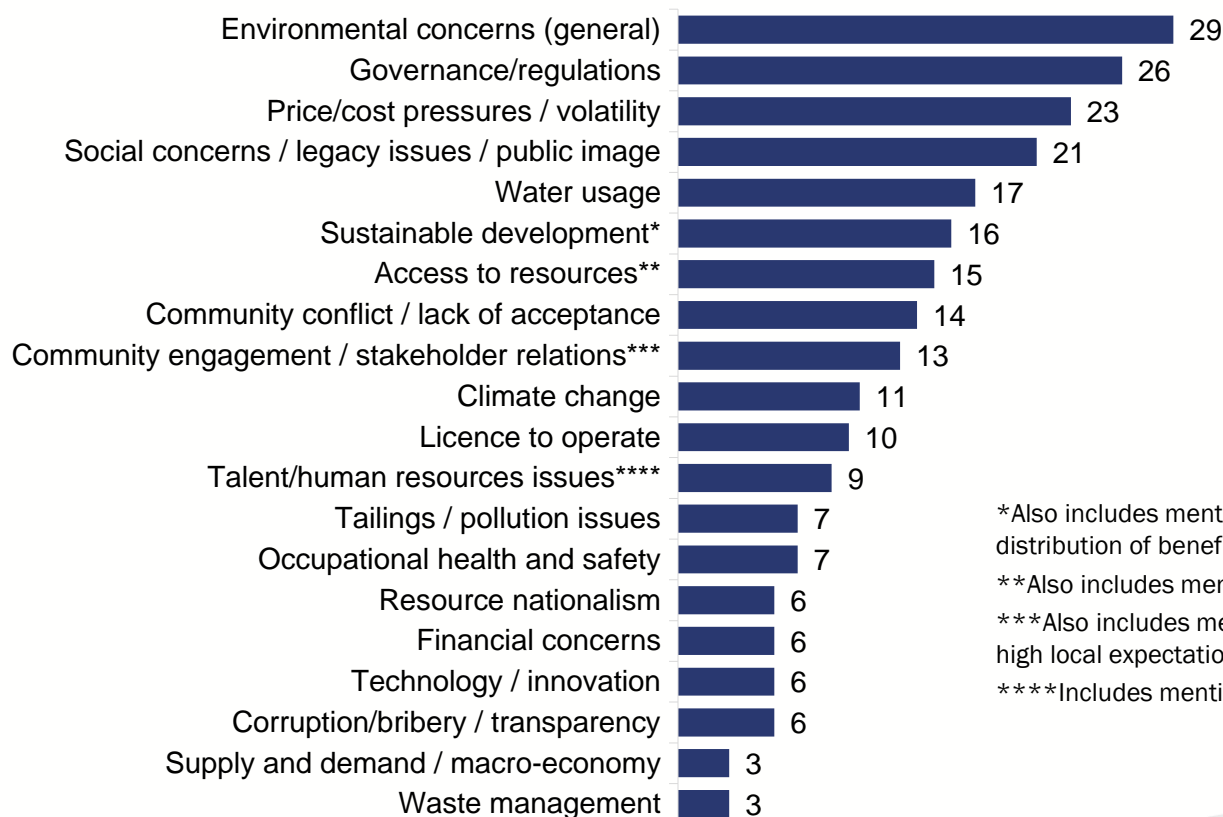
Prompted, All Respondents and by Stakeholder Group, %, 2017



# Issues Landscape

## Most Serious Issues Facing the Industry in Next Five Years

Unprompted, All Stakeholders, % Total Mentions, 2017



\*Also includes mentions of shared-value, long-term approach; distribution of benefits; strong focus on community development

\*\*Also includes mentions of exploration; land rights and access issues

\*\*\*Also includes mentions of relationships with Indigenous and FPIC; high local expectations

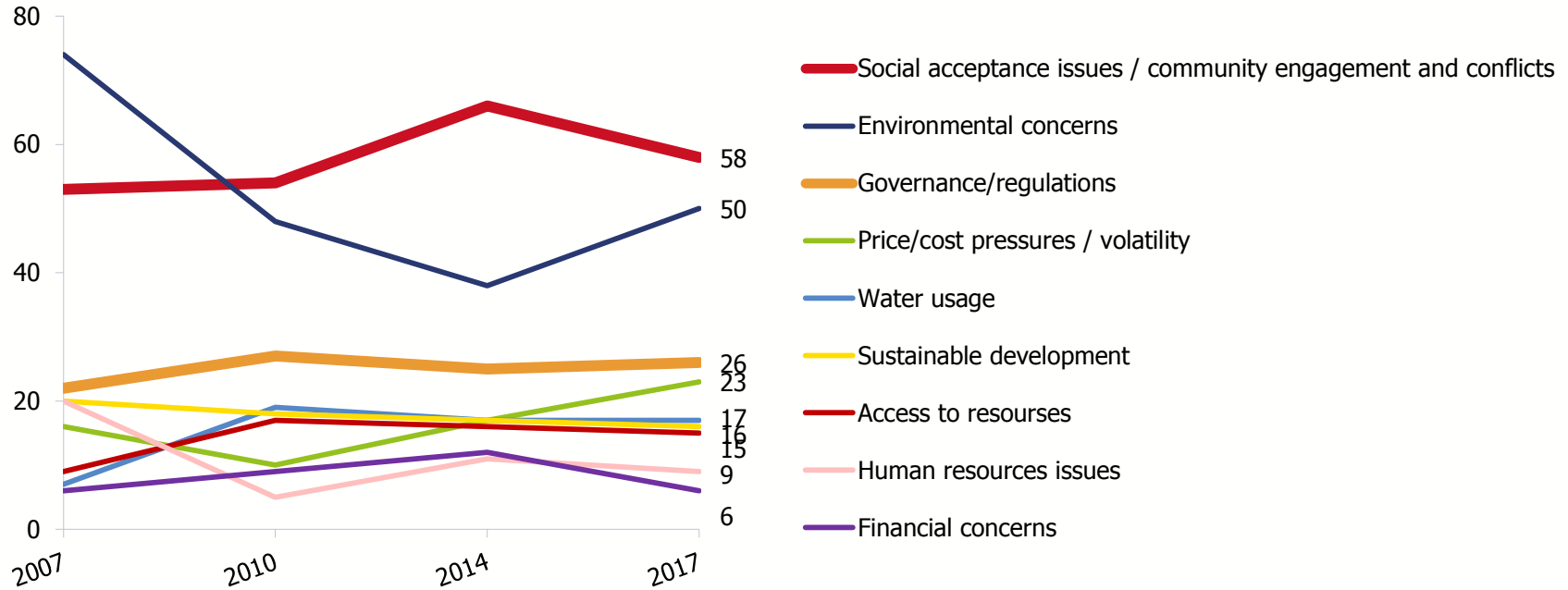
\*\*\*\*Includes mentions of working conditions, skills shortages, wages



## Issues Landscape

### Most Serious Issues Facing the Industry in Next Five Years

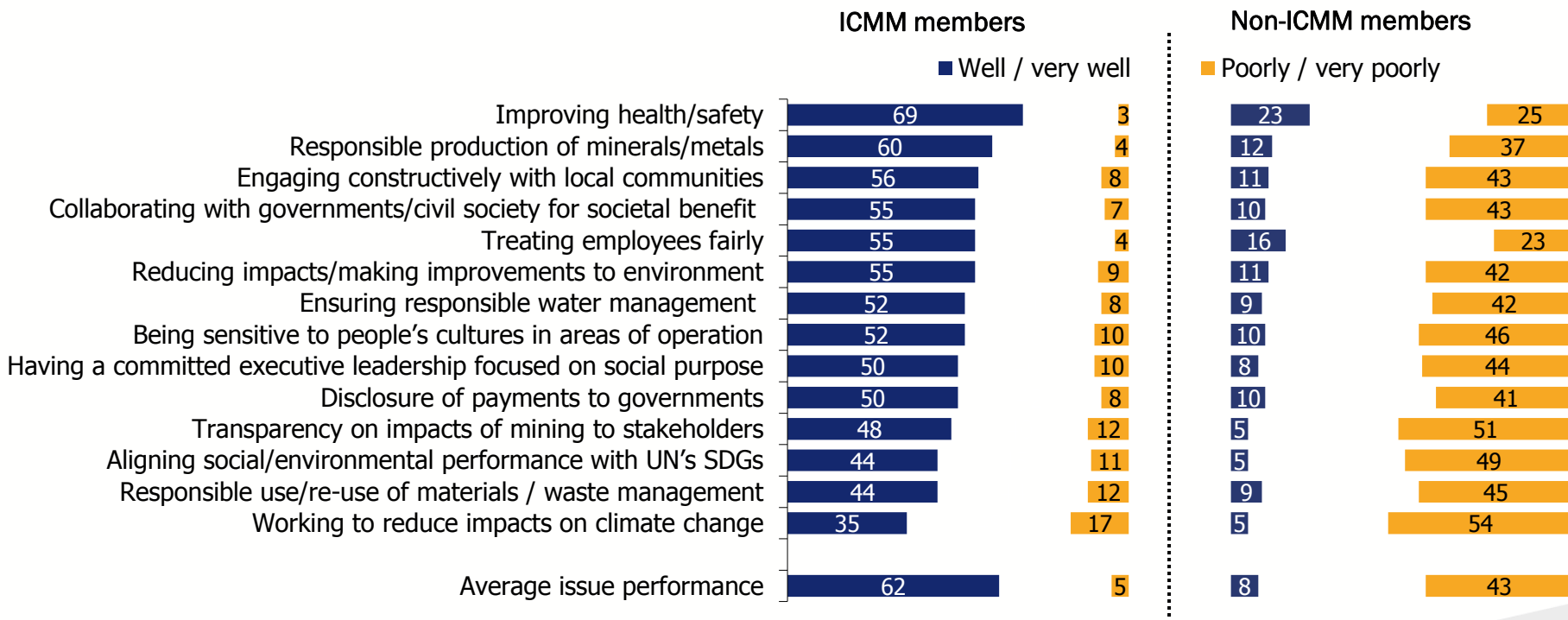
Unprompted, All Stakeholders, % Combined Top Mentions, 2007–2017



# Issues Management

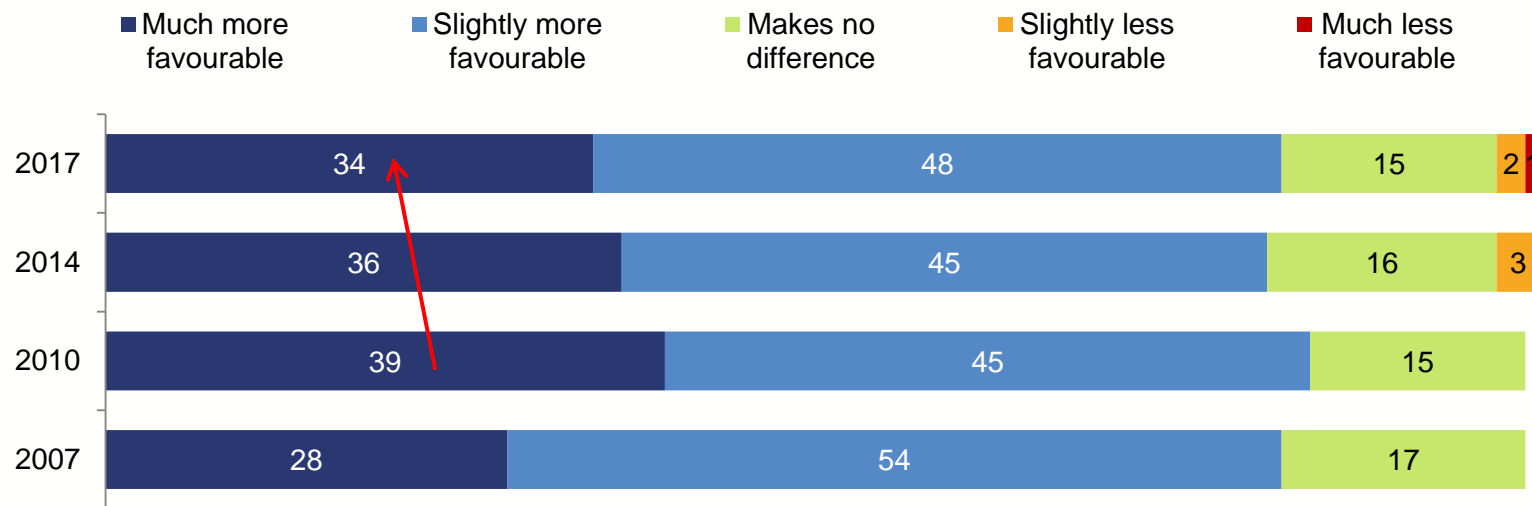
## Issues Performance by Area, ICMM Members vs Companies in Rest of Industry

All Stakeholders, %, 2017



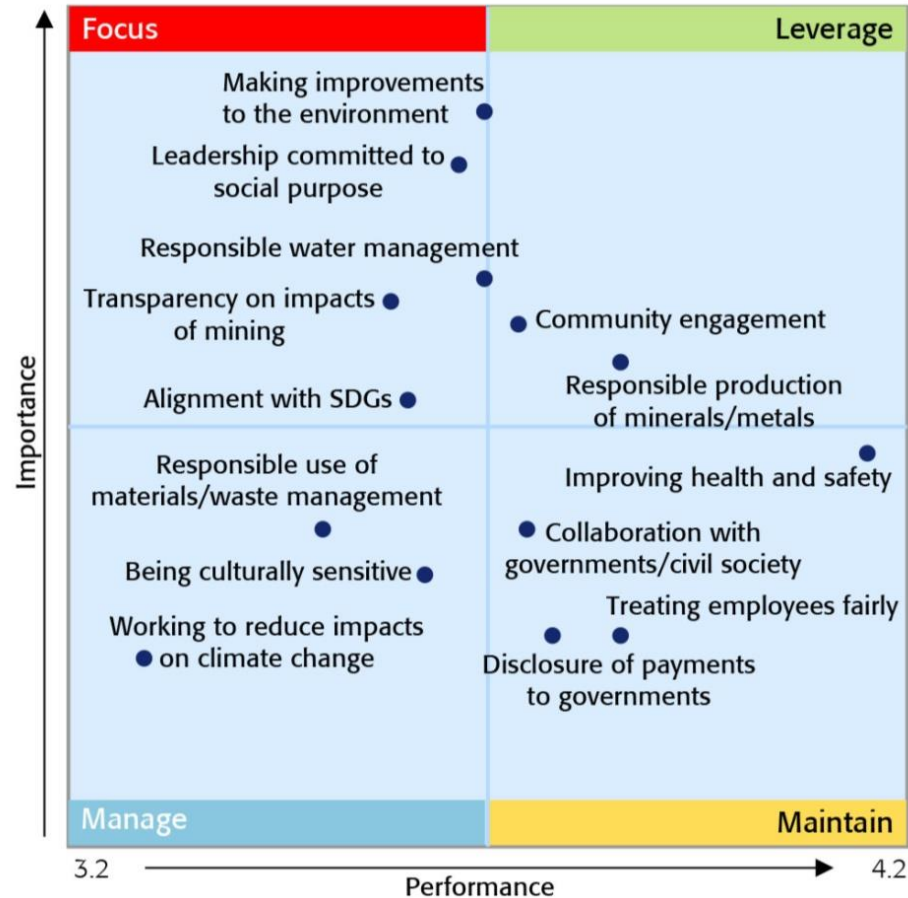
# Impact of ICMM Membership on Members' Reputation

All Stakeholders, %, 2007–2017



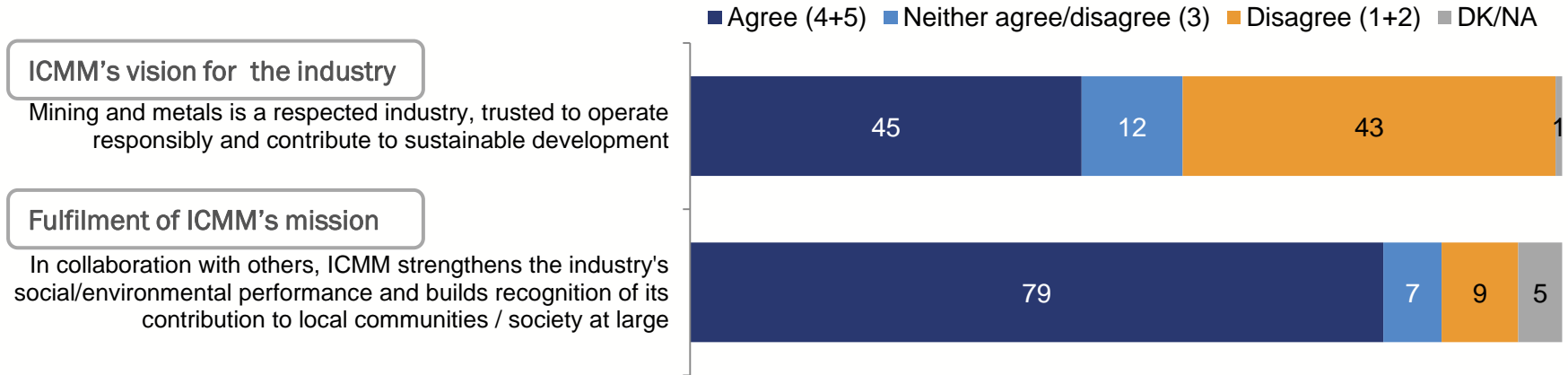
# Drivers of Reputation of ICMM Member Companies

## Importance vs Performance



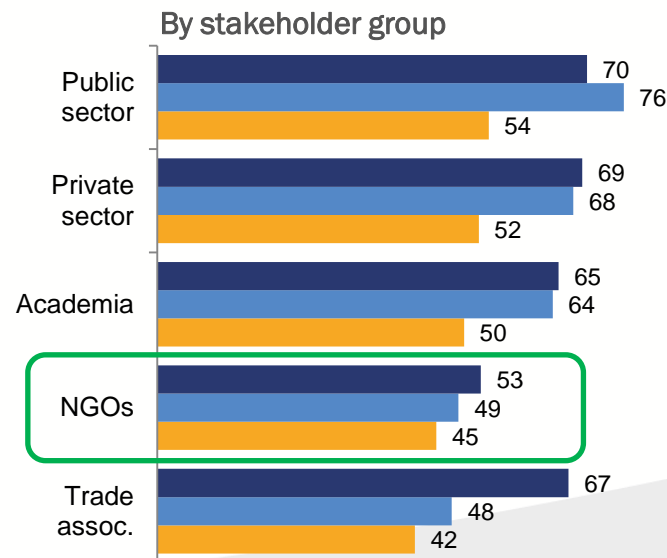
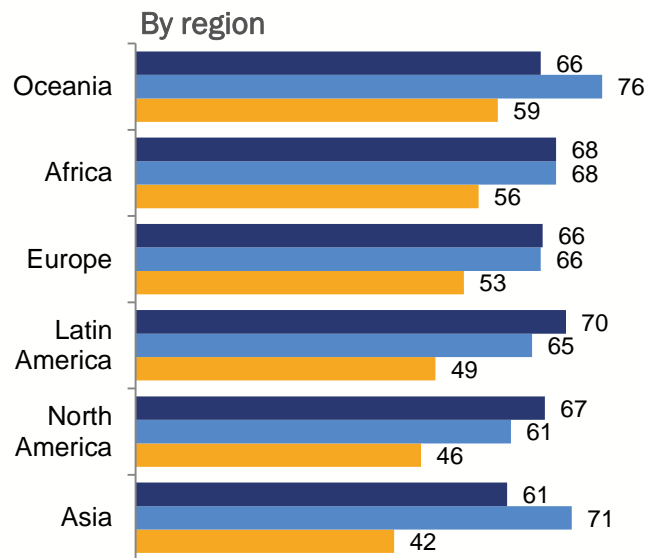
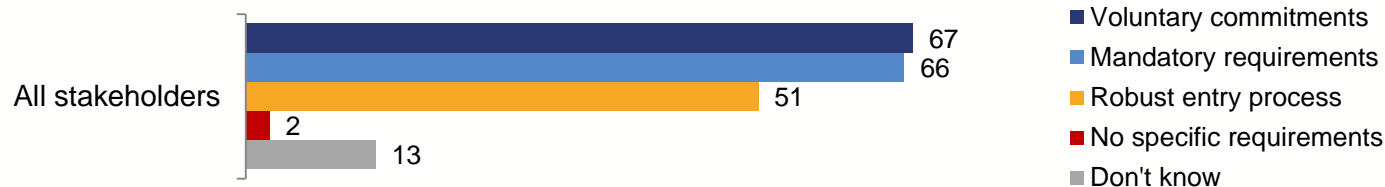
# Views on ICMM's Vision and Mission

All Stakeholders, %, 2017



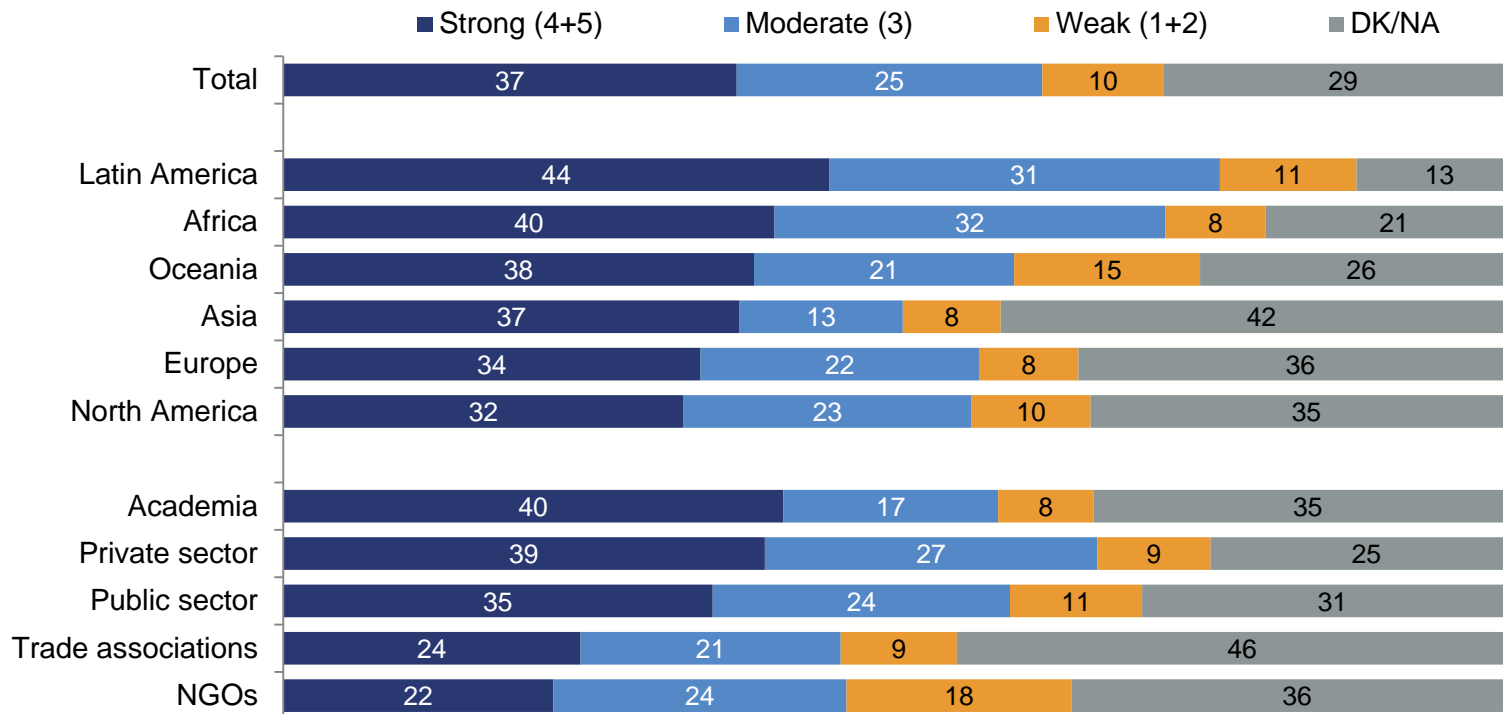
# Understanding of ICMC Membership Requirements

## All Stakeholders, by Region and Stakeholder Group, %, 2017



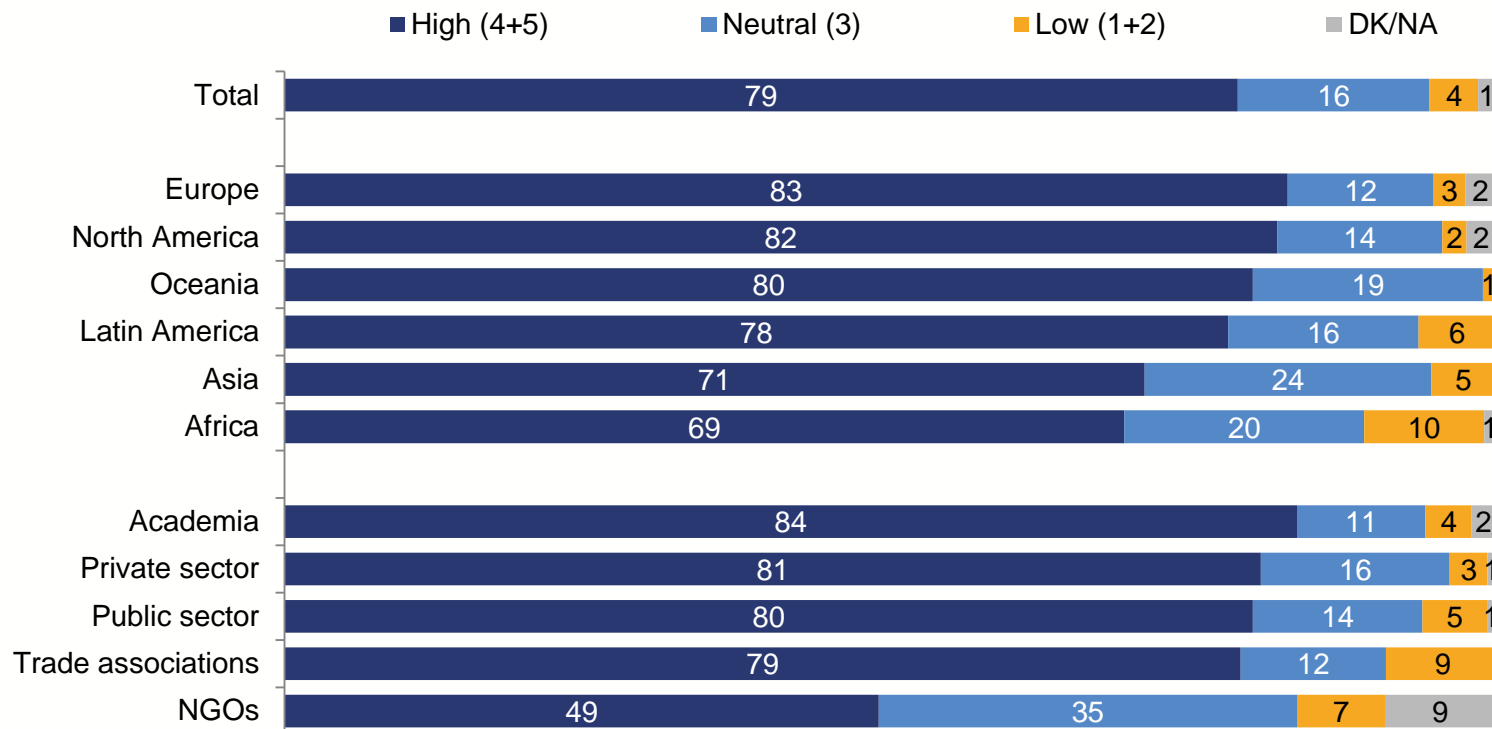
# Compliance with Membership Requirements

All Stakeholders, by Region and Stakeholder Group, %, 2017



# Value of Mining and Metals Industry to Society

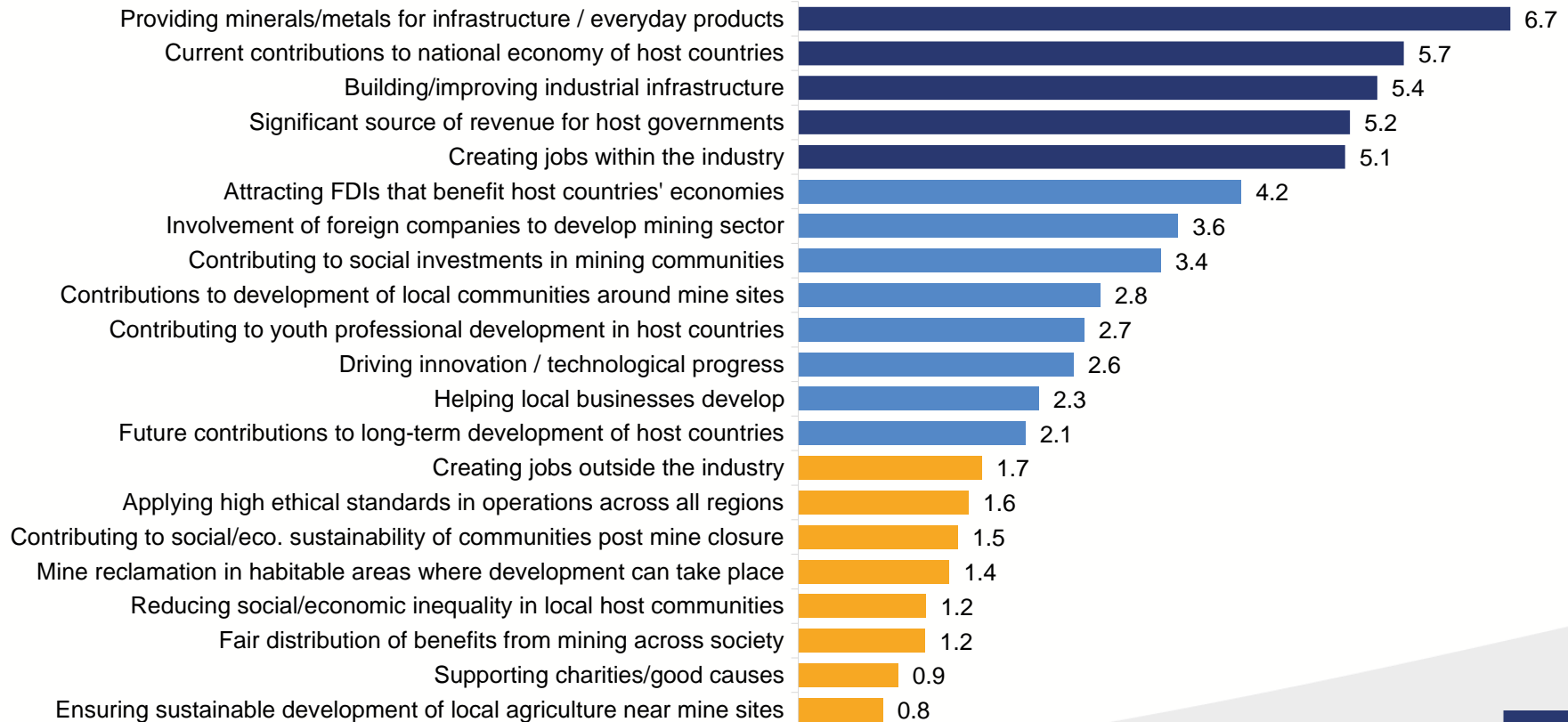
## All Stakeholders, by Region and Stakeholder Group, %, 2017





# Hierarchy between Different Areas of Contribution of Mining

“Beneficial Contribution” Score (out of ten), All Stakeholders, 2017



### **1. Competency: issues management and performance of ICMM members are strong**

Clear recognition by stakeholders of the serious efforts of ICMM member companies to address the breadth of issues the sector faces.

### **2. Behaviour: sustainability is becoming mainstream thanks to ICMM**

ICMM is perceived to be a strong enabler of sustainability, and benefits from strong legitimacy as warrantor of how the industry progresses on its journey towards sustainable development.

### **3. Purpose: the industry struggles to engage around a purposeful story of what it stands for**

Most salient benefits of mining are seen mostly through the lens of industry's core proposition: engine supporting economic growth and development; this perhaps reveals a not ambitious enough narrative for a potential value proposition.

# Broadening the Conversation on the State of Industry

## What I have heard

1. 80% of our stakeholders view the value of mining as high
2. Key drivers of public trust
  - environmental & social issues
  - community engagement
  - transparency
3. Drivers of reputation of ICMM members = areas where greater efforts are expected
4. Clear differentiation of ICMM members, but not consistently strong in all geographies
5. Respondents generally feel ICMM is delivering on its mission, but not its vision
6. Membership requirements not sufficiently clear



## A pilot campaign to:

- Engage with a wider audience that is not familiar with ICMM
- Encourage people to think about how the everyday products we rely on are produced
- Introduce them to the principled approach expected of the industry and ICMM's leadership role

## Key themes of **mining with principles**:

- Ethical business
- The environment (water, biodiversity, climate change)
- Communities

[www.miningwithprinciples.org](http://www.miningwithprinciples.org)  
#miningwithprinciples



# Q&A Session

# THANK YOU!



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