



Conferencia de Ministros de
Minería de las Américas - CAMMA
Mines Ministries of the Americas
Conference



IGF

INTERGOVERNMENTAL FORUM
on Mining, Minerals, Metals and
Sustainable Development

BIENVENIDOS

Programa

La Minería en las Américas y la
Recuperación Económica Post-COVID-19

1. **Greg Radford**, Director del IGF
La respuesta del IGF al COVID-19
2. **Paul Lefebvre**, Secretario Parlamentario para
el Ministerio de Recursos Naturales en Canadá
La experiencia de Canadá
3. **Fernando L. Benalcázar**, Viceministro de
Minería, Ecuador
La experiencia de Ecuador
4. **Roberto Sarudiansky**, Coordinador CAMMA
(Moderador)
Intercambio de opiniones y preguntas

WELCOME

Program

Mining in the Americas and Economic
Recovery Post-COVID-19

1. **Greg Radford**, Director of IGF
IGF's COVID-19 response
2. **Paul Lefebvre**, Parliamentary Secretary to
Canada's Minister of Natural Resources
The experience of Canada
3. **Fernando L. Benalcázar**, Vice Minister of
Mining, Ecuador
The experience of Ecuador
4. **Roberto Sarudiansky**, Coordinator CAMMA
(Moderator)
Exchange of opinions and questions



IGF

INTERGOVERNMENTAL FORUM
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Sustainable Development

COVID-19 Response Series

Greg Radford, Director
July 2020

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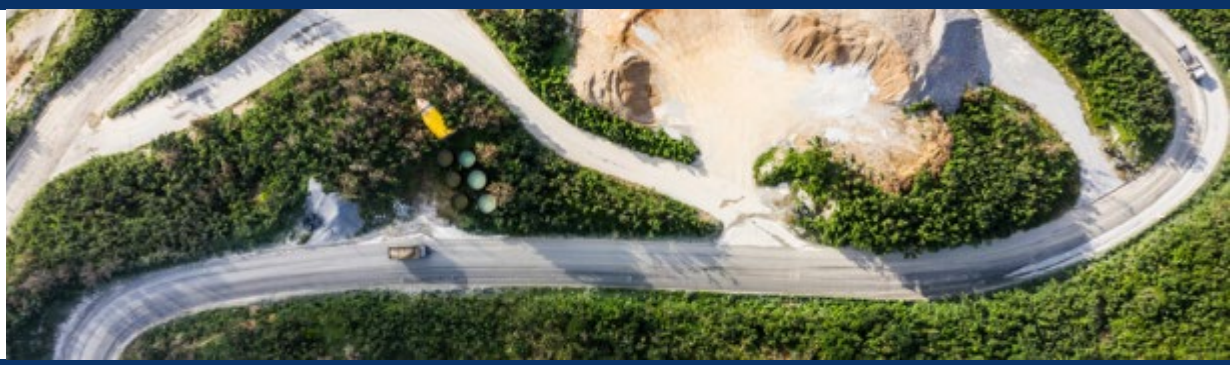
COVID-19 RESPONSE SERIES



The IGF Secretariat has initiated a new COVID-19 response series to help member governments better understand the potential **impacts** and **policy responses** in the following priority areas:

- ***Impact of COVID-19 on Employment in Mining***
- ***Mining Tax Policy Responses to COVID-19***
- ***Artisanal and Small-scale Mining (ASM)***

<https://www.igfmining.org/covid-19-response-series/>



Employment and COVID-19

- Briefing paper: ***Impacts of COVID-19 on Employment in Mining*** published on IGF website in English, French, Spanish.
- Webinar: ***COVID-19 and Local Procurement: How will the mining sector's supply chains adapt?*** Focused on resilient supply chains and employment. May webinar is available on IGF website.
- Webinar: ***Employment in Mining During COVID-19: Impacts, responses and future outlook.*** June webinar is available on IGF website.

In process:

- Blog: ***The Future of Mining in a Post-Covid World: A Perspective from Industrial Global Union*** (late July release date).
- Webinar: ***The Future of Mining in light of COVID-19 and new technology*** (August 12).



Mining Tax Policy Responses to COVID-19

- Published guidance on *Mining Tax Policy Responses to COVID-19*.
- Published guidance on *Force Majeure and COVID-19*.
- Note: all guidance available in English, French, and Spanish on IGF website.
- Webinars on *Mining Tax Policy Responses to COVID-19* held in English (April), French (May), and Spanish (May). Webinars are available on the IGF website.
- Webinar on *COVID-19 and Force Majeure in Mining Contracts* for West African Economic and Monetary Union (UEMOA) member countries (June).
- Invited to speak at forums organised by the Centre for Economic Policies, OECD Natural Resource Policy Dialogue, and the University Dauphine in Paris.



THE FUTURE OF RESOURCE TAXATION

Rethinking how mining contributes to public finances in developing countries

PROJECT LAUNCH

- Project launch press release, available on IGF website in English, French and Spanish
- An op-ed published in the Financial Times, co-authored by IGF Director Greg Radford and ATAF Executive Secretary Logan Wort
- A feature interview with IGF's Alexandra Readhead on the latest Highgrade Podcast



Artisanal and Small-scale Mining

- ▶ **IGF Members Survey:** June – July survey of English, Spanish and French-speaking members to better understand how their governments are responding to the pandemic in support of ASM miners and communities.
- ▶ **ASM Member Webinars:** We're planning webinars with each language group, designed around peer learning and exchange on government responses. August webinar in Spanish in collaboration with CAMMA.
- ▶ **ASM Government Briefing Note:** IGF will prepare a briefing note for government about the results of the survey and research and possible means of support to miners and communities in the wake of the pandemic (September release).
- ▶ **October AGM:** IGF will host a session at the AGM focused on the outcomes of the member survey, webinars, and briefing note.



IGF 2020

October 20-22
**MINING AND COVID-19:
FROM CRISIS TO SUSTAINABILITY**

16th Annual General Meeting will be virtual in 2020 and will discuss a number of COVID-19 related thematic areas, including:

- ▶ ASM
- ▶ community engagement and employment
- ▶ environmental management best practices
- ▶ gender equality
- ▶ minerals required to combat climate change
- ▶ responsible sourcing
- ▶ resource taxation
- ▶ technology and innovation

THANK YOU

IGFMining.org

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IGF

INTERGOVERNMENTAL FORUM
on Mining, Minerals, Metals and
Sustainable Development

AGENDA PARA LA RECUPERACIÓN TRAS LA COVID-19 Y SECTOR MINERO DE CANADÁ, 22 DE JULIO DE 2020



Natural Resources
Canada

Ressources naturelles
Canada

Canada

BEFORE COVID-19

60+

Minerals and metals produced

200

Active mines

\$97B

Direct and indirect GDP in 2018

\$80B

Private sector investment planned over the next decade

\$13B

Investment in 2018

19%

Canada total exports in 2018

626,000

Direct and indirect employment in 2018

\$47B

Worth of minerals and metals produced in 2018

Canada's mining and exploration sector has stepped up in response to COVID-19 with safety measures and community aid



Indigenous Peoples play an integral role in mining in Canada.

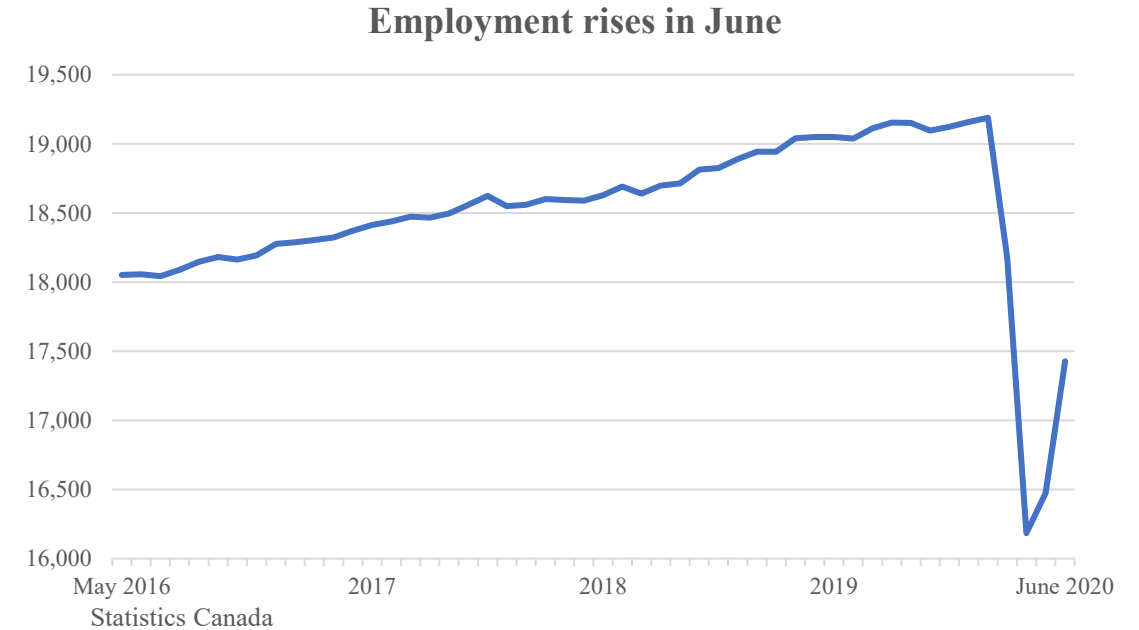
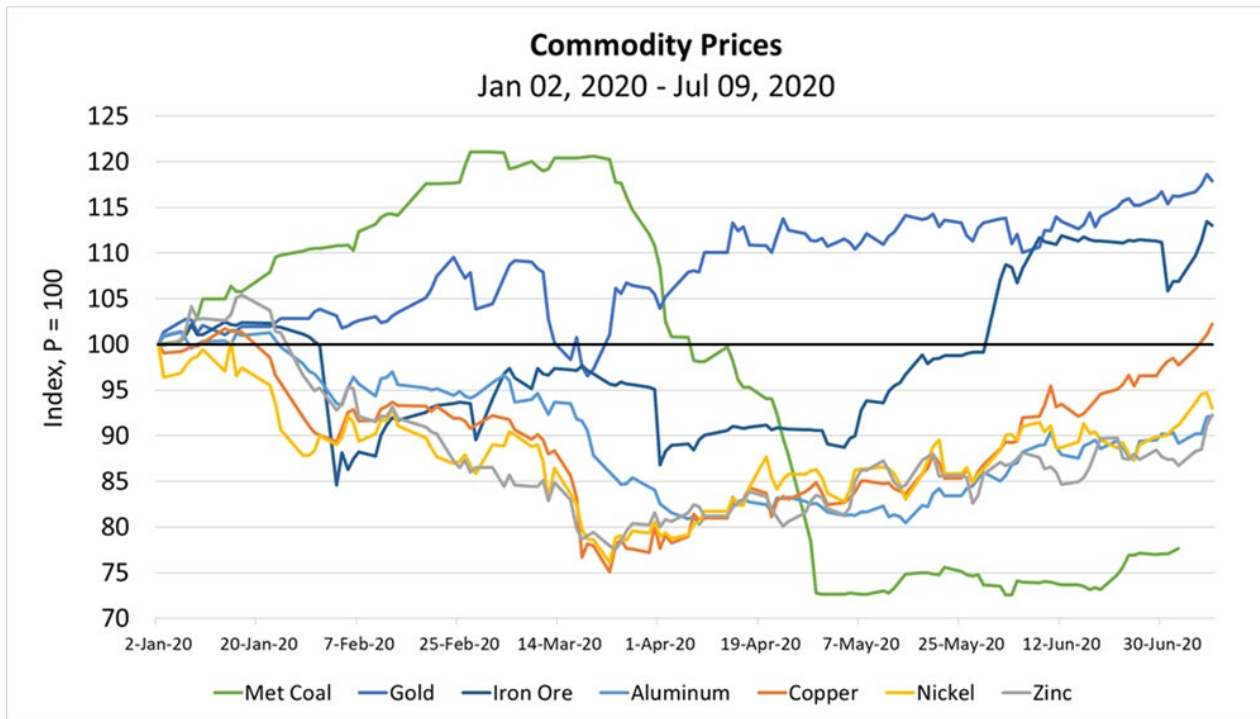
The **second highest** private sector employer of Indigenous Peoples by proportion, accounting for **~12%** of the mining labour force (7,600). More than doubling the all-industry average representation of **4.0%**.

Hundreds of Indigenous-owned businesses operate in the supply chain supporting the realization of long-term, sustainable socio-economic benefits

~600 Indigenous communities are located within **100km** radius of major minerals or mining projects

Over **420** active agreements between companies and communities are in place that supports training, skills developments, and other elements that contribute to socio-economic growth





- **Commodity prices are generally recovering**, but there are notable exceptions – Iron Ore, Diamonds.
- Mining companies continue to face **stressed balance sheets**, low demand, reduced production, and higher operating costs around COVID.
- Some exploration companies are beginning their summer programs, but **firms are facing restrictions** surrounding travel, work camps, and opposition to outside workers entering remote communities.
- Gradual lifting of confinement and positive employment data in Canada and the U.S. are **encouraging signs, but significant risks persist**.



Canada's COVID-19 Economic Response Plan SUPPORT FOR BUSINESSES

TO AVOID CLOSURES AND LAYOFFS

Extending Work-Sharing Program

Provides income support to employees who agree to reduce normal working hours

10% Temporary Wage Subsidy for Employers

Reduces the amount of payroll deductions

Canada Emergency Wage Subsidy (CEWS)

Covers a portion of an employee's wages

TO PROVIDE FINANCIAL SUPPORT, LOANS AND ACCESS TO CREDIT

Business Credit Availability Program (BCAP)

Works with financial institutions to co-lend term loans

Large Employer Emergency Financing Facility (LEEFF)

Provides bridge funding to keep operations going

Canada Emergency Commercial Rent Assistance

Delay GST/HST and income tax payments

Canada Emergency Business Account (CEBA)

Provides interest free loans up to \$40,000

SUPPORT FOR CANADA'S MINERALS AND METALS SECTOR

TO PROVIDE PRE-COMPETITIVE, PUBLIC GEOSCIENCE AND KEY KNOWLEDGE FOR MINERAL EXPLORATION IN CANADA

Canadian Minerals and Metals Plan: Pan Canadian Geoscience Strategy

Targeted Geoscience Initiative

\$25M over 5 years, \$5M per year ongoing

Incorporates new modelling techniques and leverages disruptive technologies such as artificial intelligence and 3D visualization to deliver geoscience research

Geo-mapping for Energy and Minerals Program

\$78M over 5 years and \$22M in future years

Provides new geoscience knowledge and tools to Northern communities, governments, and industry to support mineral resource development, climate-resiliency, and sustainable land use

Extending Timelines for Flow-Through Shares

By 12 month

Provides companies with the additional time needed to incur eligible expenses, allowing them to safely plan when to best continue operations, while allowing them to avoid costs from not meeting original flow-through share timelines



DESARROLLO ECONÓMICO Y
COMPETITIVIDAD

MEDIO AMBIENTE

CIENCIA, TECNOLOGÍA E INNOVACIÓN

FOMENTO DE LA PARTICIPACIÓN DE
PUEBLOS INDÍGENAS

COMUNIDADES



LIDERAZGO MUNDIAL

Una marca canadiense para la minería

- Se promueven soluciones **de gobernanza responsable de los recursos** en el país y en el extranjero a fin de desarrollar un entorno minero global más estable y predecible
- Una estrategia conjunta de la industria y el gobierno para **apoyar el éxito de las empresas mineras canadienses de suministro y servicios**
- Revelar una **marca canadiense de minerales y metales**



Natural Resources
Canada

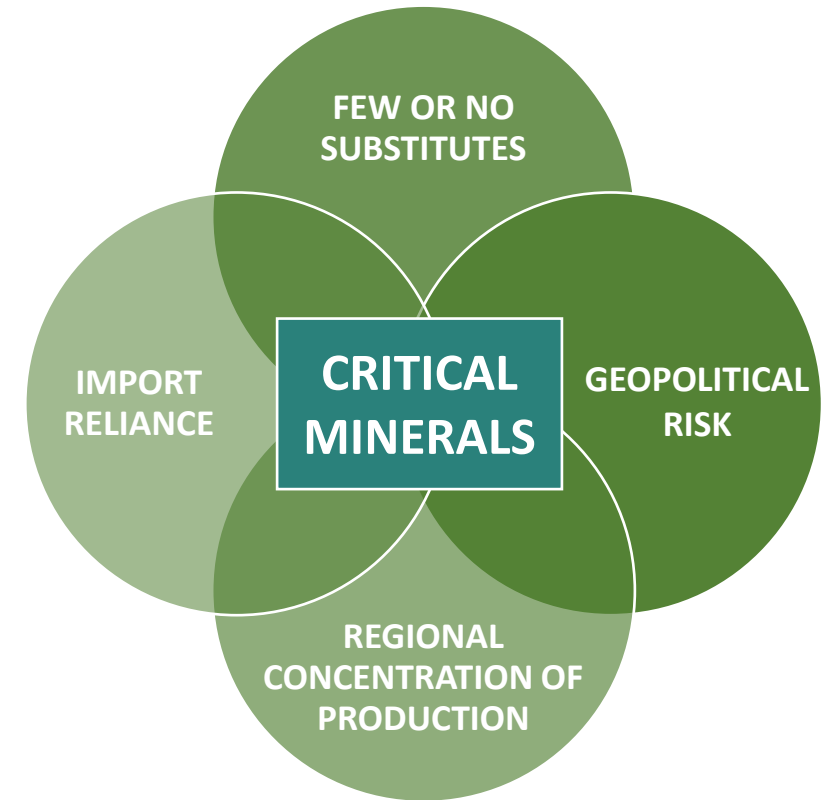
Ressources naturelles
Canada



Canada

The COVID-19 pandemic has underscored the urgent need to secure and diversify critical mineral supply chains.

- The **reorientation of global supply chains** presents an opportunity for Canada to position itself as a responsible, sustainable and stable supplier of critical minerals, and to attract investment.
- Much of Canada's up- and midstream critical minerals industry is in its infancy and is **expected to experience challenges** with solvency and recovery from the COVID-19 downturn.
- Despite these challenges, **economic stabilization and recovery present an opportunity** to refocus on Canada's goal to build domestic critical mineral value chains in strategic sectors, including renewable energy and clean technologies, and to position Canada with allies in efforts to secure global critical mineral supply chains.



CANADA'S GLOBAL PRODUCTION RANKING

1ST

Potash

2nd

Uranium
Niobium

3rd

PGMs
Nickel
Cobalt

4th

Aluminum

There is no global definition of critical minerals. Critical minerals are country-specific and their 'criticality' can change based on supply and demand.



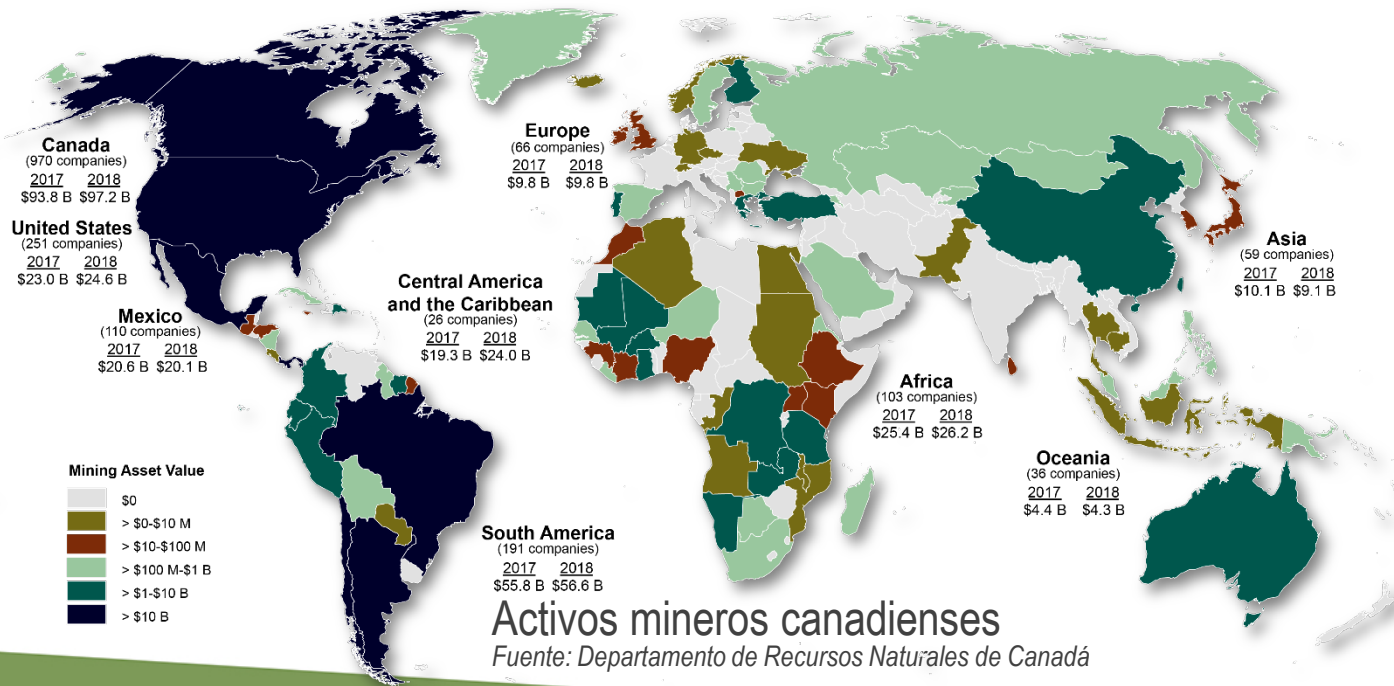
Canadá y el continente americano: una asociación hemisférica para promover una minería INTELIGENTE, sustentable y responsable

Marca global sólida

Empresas responsables

Experiencia líder

Proveedor sustentable



Canadá tiene más de **\$100 mil millones** en activos mineros y 330 empresas que operan en el Caribe, Centroamérica y América Latina.

El sector minero de Canadá y el continente americano ayudará en la recuperación tras la COVID-19 entregando materias primas para el desarrollo de infraestructura, usos médicos y bienestar social.

A través del comercio integrador con el continente americano, Canadá está bien posicionada en el suministro de minerales fundamentales para impulsar la transición energética después de la COVID-19.

Canadá continuará impulsando prácticas mineras innovadoras, responsables y sustentables en todas las operaciones y asociaciones.



Natural Resources Canada

Ressources naturelles Canada



¡Gracias!



Natural Resources
Canada

Ressources naturelles
Canada

Canada

Canada

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Natural Resources
Canada

Ressources naturelles
Canada

Canada



MINISTERIO DE ENERGÍA Y RECURSOS NATURALES NO RENOVABLES
VICEMINISTERIO DE MINAS

Fernando L. Benalcázar
Viceministro de Minas



LA MINERÍA EN LAS AMÉRICAS Y LA RECUPERACIÓN ECONÓMICA POST COVID-19

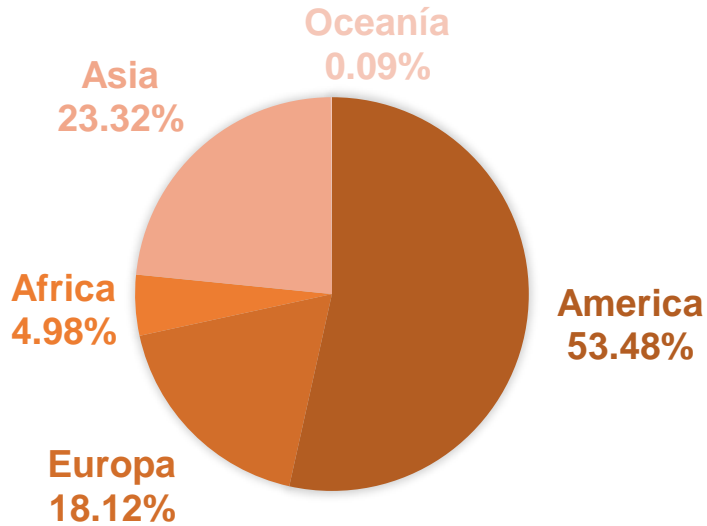
JULIO 22, 2020

Lenín

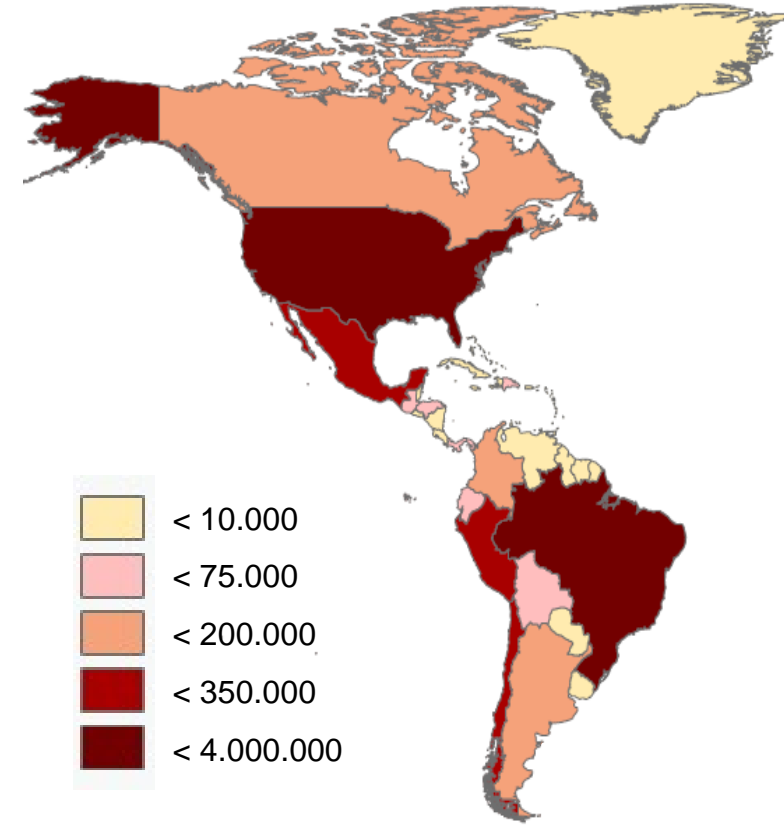
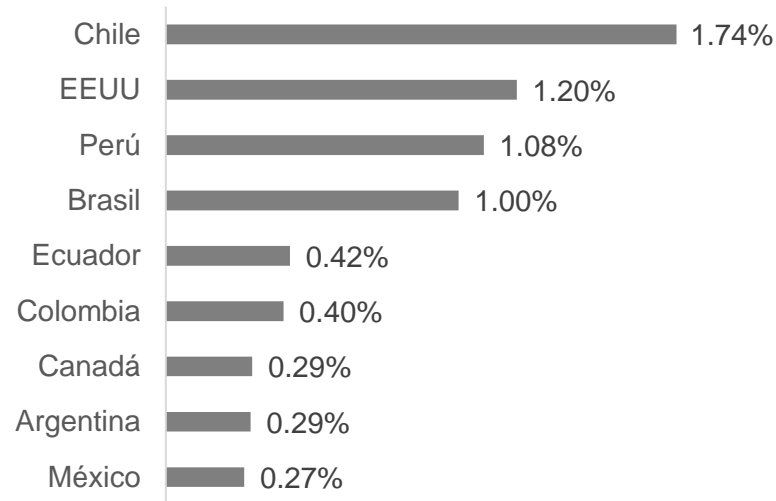


PANDEMIA MUNDIAL

Casos mundiales de covid-19



Relación
Casos confirmados / población



Fuente: Elaborado por Viceministerio de Minas del Ecuador en base a información de <https://www.worldometers.info/coronavirus/?zarsrc=130>

Corte: 20/07/2020

World Economic Outlook
(FMI, Junio 2020)

Variación anual del PIB
mundial en 2020 = **-4,9%**

EEUU: **-8,0%**

Canadá: **-8,4%**

América Latina y Caribe: **-9,4%**

CASO ECUADOR



SITUACIÓN NACIONAL POR COVID-19

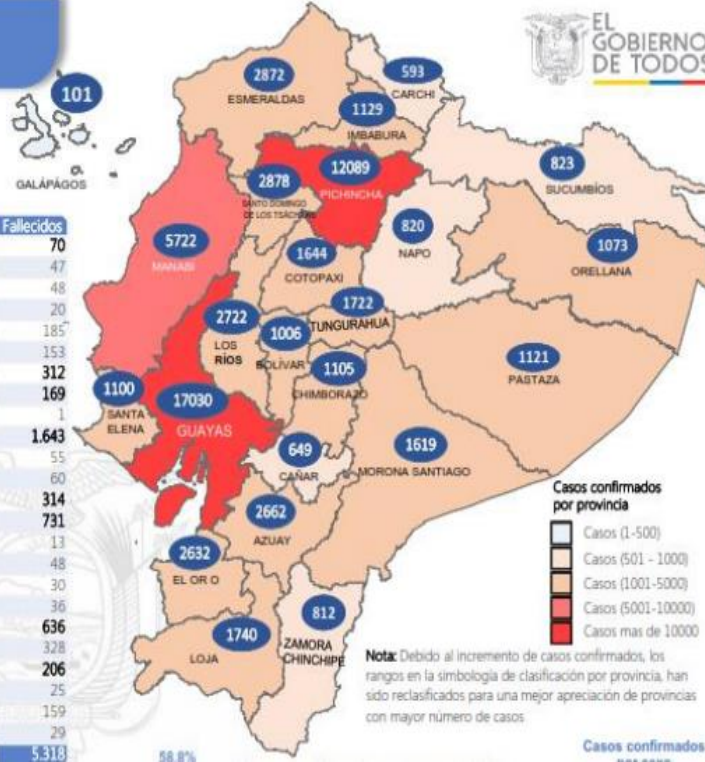
INFOGRAFÍA N°144

Inicio 29/02/2020- Corte 20/07/2020 08:00

Se han tomado **204.933** muestras para COVID-19, entre PCR y pruebas rápidas

Detalle de casos confirmados por PCR

Provincia	Confirmado	%Confirmado	Fallecidos
Azuay	2.662	4,05%	70
Bolívar	1.006	1,53%	47
Cañar	649	0,99%	48
Carchi	593	0,90%	20
Chimborazo	1.105	1,68%	185
Cotopaxi	1.644	2,50%	153
El Oro	2.632	4,01%	312
Esmeraldas	2.872	4,37%	169
Galápagos	101	0,15%	1
Guayas	17.030	25,94%	1.643
Imbabura	1.129	1,72%	55
Loja	1.740	2,65%	60
Los Ríos	2.722	4,15%	314
Manabí	5.722	8,71%	731
Morona Santiago	1.619	2,47%	13
Napo	820	1,25%	48
Orellana	1.073	1,63%	30
Pastaza	1.121	1,71%	36
Pichincha	12.089	18,41%	636
Santa Elena	1.100	1,68%	328
Sto. Domingo Tsáchilas	2.878	4,38%	206
Sucumbios	823	1,25%	25
Tungurahua	1.722	2,62%	159
Zamora Chinchipe	812	1,24%	29
Total	65.664	100%	5.318



5.900	9.725	16.330
Pacientes Recuperados	Casos con Alta Hospitalaria	Alta Epidemiológica 171



101.720	74.620	5.318
Casos Descartados	Casos Confirmados	Personas Fallecidas

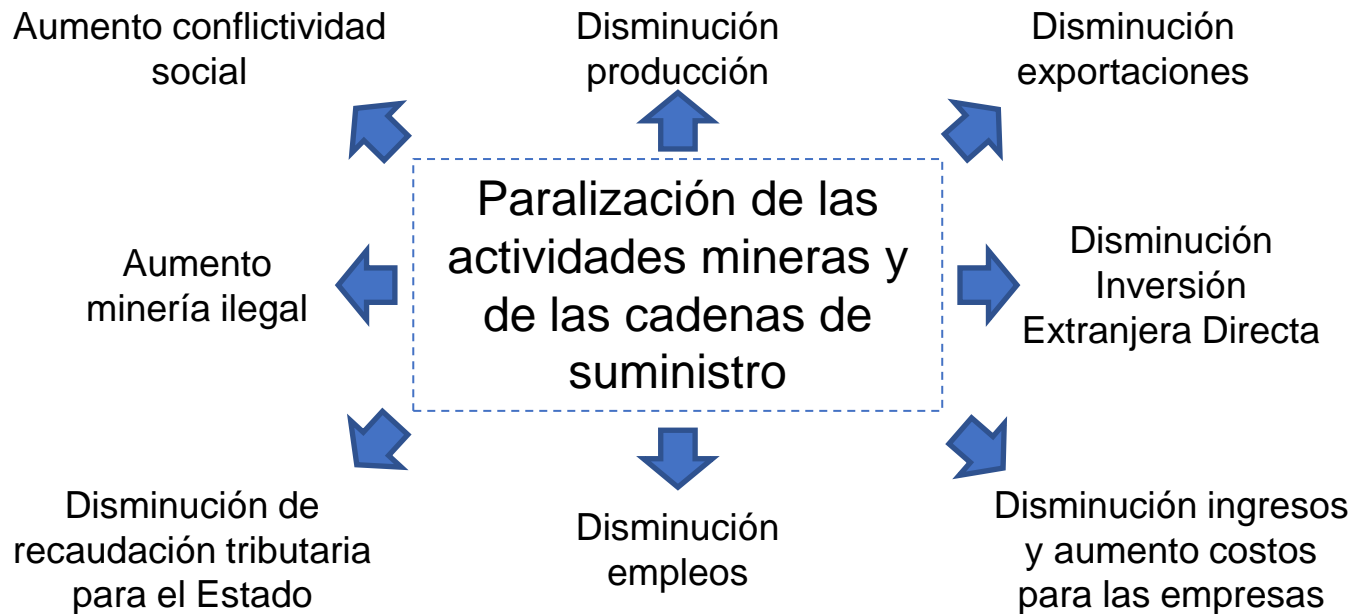
PCR: 90.104 PCR: 65.664
Pruebas rápidas: 11.616 Pruebas rápidas: 8.956

Estado de personas contagiadas	
Pacientes recuperados	5.900
Alta hospitalaria	9.725
Alta epidemiológica 171	16.330
Estables en aislamiento domiciliario	36.270
Hospitalizados estables	732
Hospitalizados con pronóstico reservado	345
* Fallecidos	5.318
Total	74.620

<https://www.gestionderiesgos.gob.ec/wp-content/uploads/2020/07/Informe-de-Situaci%C3%B3n-No052-Casos-Coronavirus-Ecuador-20072020.pdf>

- **Economía nacional golpeada antes de la pandemia** (crecimiento anual del PIB 2019: 0,05%, disminución del 38,8% de la tasa de empleo adecuado)
- **Decrecimiento del PIB 2020: -10,9%** (FMI)
- **850.000 personas** entrarían en condición de **desempleo** en 2020 (OIT)
- **COVID-19:**
 - **74.620 casos confirmados** (al 20/07/2020)
 - **5.318 personas fallecidas** (al 20/07/2020)
- **MINERÍA:**
 - Actividades normales: **2%** (actualmente 11%)
 - Actividades parciales: **24%** (actualmente 28%)
 - Actividades suspendidas: **60%** (Actualmente 47%)
 - **25%** de la fuerza laboral minera en actividades
 - **USD 72,5 millones de minerales** no se han exportado

IMPACTOS EN EL SECTOR MINERO DE LA REGIÓN



Elaborado por: Ministerio de Energía y Recursos Naturales No Renovables

“Sin minería no hay energía, sin energía no hay minería, ni crecimiento, ni desarrollo”

SOLUCIONES

EVITAR

Paralización de las actividades mineras y de las cadenas de suministro

EVITAR

“*Race to the Bottom*”: Incentivar a reducir las regulaciones empresariales, derechos laborales, leyes ambientales y marco tributario para atraer inversiones

PRECAUTELAR

Salud y seguridad de los trabajadores, contratistas, proveedores, comunidades aledañas y poblaciones asentadas a lo largo del transporte de minerales e insumos para la industria

FOMENTAR

Transparencia de la información sectorial



PROTOCOLO DE PREVENCIÓN EN BIOSEGURIDAD PARA EL SECTOR MINERO FRENTE A LA PANDEMIA DE COVID-19



COE - 15 de mayo de 2020

APROBACIÓN del “Protocolo de Prevención en Bioseguridad para el Sector Minero frente a la pandemia de COVID-19”.



Las principales disposiciones del Protocolo son:



Plan de transporte para trabajadores, minerales e insumos de abastecimiento.



Disposiciones para el ingreso a una jornada de trabajo.



Plan que contemple las medidas de limpieza y desinfección de instalaciones, equipos y maquinaria.



Plan que contenga las medidas para asegurar el distanciamiento social.



Plan de limpieza, desinfección y almacenamiento de alimentos, insumos y materiales.



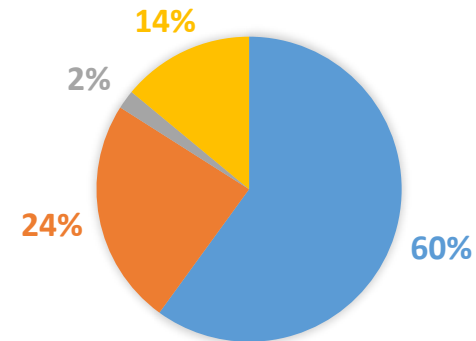
Plan de capacitación para sus trabajadores, personal médico y personal de mantenimiento.



Plan específico para la detección de posibles casos de COVID-19.

MINISTERIO DE ENERGÍA Y RECURSOS NATURALES NO RENOVABLES

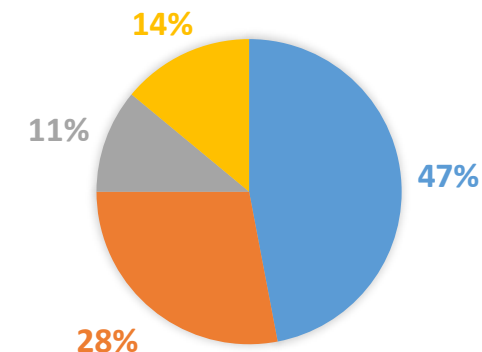
Corte: 18/05/2020 - **Fuente:** 11.690 reportes diarios de concesiones mineras y operadores



Operaciones mineras suspendidas

Operaciones mineras parciales

Corte: 15/07/2020 - **Fuente:** 14.154 reportes diarios de concesiones mineras y operadores



Actividades mineras operan con normalidad

Actividades mineras suspendidas por razones ajenas a la emergencia



CRISIS COVID-19 SE CONVIERTE EN OPORTUNIDAD

Las compañías mineras de todo el mundo ya vienen implementando y adoptando rápidamente lo último en tecnologías de automatización minera. Por ejemplo, en países como Canadá, Sudáfrica o Reino Unido donde se encargan de extraer hierro, magnesio, estaño, entre otros minerales, hacen uso de estas herramientas buscando modernizar sus operaciones y hacerlas más eficientes. Se sabe que la productividad de una empresa minera puede llegar a crecer entre un 15% o 20% si adopta de forma eficiente las nuevas tecnologías.

<https://mineriaenlinea.com/2020/06/los-beneficios-de-la-automatizacion-en-el-sector-minero/>

- Automatización de operaciones
- Centros de controles remotos
- Maquinaria autónoma

- ❖ Disminución de Costos de Operación
- ❖ Disminución de Riesgos Humanos
- ❖ Personal más calificado

CONTROL Y PLANIFICACIÓN – MEJORAMIENTO EN LAS PRACTICAS DE SEGURIDAD INDUSTRIAL Y SALUD OCUPACIONAL



Programa “Médico del Barrio” realizó 4012 atenciones en El Pangui con apoyo de ECSA



Fuente: Lundin Gold



Fuente: Lundin Gold



El Teniente (Chile) cuenta con palas LHD automáticas para el traslado y vaciado de mineral.

Proyecciones crecimiento PIB 2021:

- Mundo: +5,4%
- EEUU: +4,5%
- Canadá: +4,9%
- América Latina y Caribe: +3,7%

Fuente: FMI

LA MINERÍA, UNA LUZ PARA LAS ECONOMÍAS NACIONALES

	Precio 21/07/2020	Rendimiento anual
Au 	1.838,77 USD / onza troy	20,25%
Ag 	21,04 USD / onza troy	16,74%
Cu 	6.501,80 USD / tonelada	5,07%

Fuente: Viceministerio de Minas



Mayoría de analistas proyectan **alza generalizada** de precios de los *commodities*



Bank of America: **USD 3.000** por onza troy a 18 meses (“*The Fed can’t print gold*”; Abr-20)

**MINERÍA CON
RESPONSABILIDAD**



- ✓ Inversiones
- ✓ Exportaciones
- ✓ Ingresos para el Estado



**DESARROLLO
ECONÓMICO
REGIONAL**

UNA NECESIDAD....

Every American Born Will Need...

30,190 lbs. Salt

12,182 lbs. Clays

1.54 Troy oz. Gold

1.36 million lbs. Stone, Sand, & Gravel

953 lbs. Lead

330,573 lbs. Coal

plus 62,648 lbs. Other Minerals & Metals

2,066 lbs. Bauxite (Aluminum)

466 lbs. Zinc

20,127 lbs. Iron Ore

980 lbs. Copper

53,071 lbs. Cement

75,327 gallons Petroleum

14,337 lbs. Phosphate Rock

7.70 million cu. ft. Natural Gas

3.19 million pounds of minerals, metals, and fuels in their lifetime

©2019 Minerals Education Coalition

Learn more at www.MineralsEducationCoalition.org

MINISTERIO DE ENERGÍA Y RECURSOS NATURALES NO RENOVABLES
VICEMINISTERIO DE MINAS

GRACIAS



Lenín

