

**Mining
Opportunities Summit**

Summary Report



Project Lead: Amanda Hachey

Email: adhachey@gmail.com

Phone: 506.850.6569

TABLE OF CONTENTS

Background.....	3
Context	3
Summit Agenda and Participants	3
What We Heard.....	4
Opportunity - Incentives	8
Opportunity – Streamline Regulations (without compromising environmental integrity)	9
Opportunity – Social License	10
Opportunity – First Nation Partnerships	10
Opportunity – Flow through R&D	11
Opportunity – Training and skill development.....	12
Opportunity – Data and Technology	12
Lessons Learned	13
What went well	13
What could be improved.....	13
Next Steps.....	14
APPENDIX A: Attendees.....	15
APPENDIX B: Participant feedback	17

BACKGROUND

Context

The Jobs Board Secretariat was established to support the Jobs Board and its mandate to foster a jobs and economic growth agenda for New Brunswick. The opportunities-based economic development model is based on the idea that the competition for business investment and for highly ambitious entrepreneurs and talent has never been as high as it is today. We need to identify and align our resources to develop tangible, highly valuable and profitable opportunities that will attract investment from local businesses, communities, ambitious new entrepreneurs and multinational firms.

In order to ensure that we are considering the largest range of potential opportunities for NB's growth, the JBS has organized a series of Opportunities Summits around the province, between late September and March 2016, in partnership with Opportunities NB (ONB) and lead departments.

Summit Objectives

- Identified long list of viable economic opportunities to explore
- Identified conditions for success in identified opportunities
- Participants had a positive experience and felt their contribution mattered
- Participants felt heard

Summit Agenda and Participants

On February 19th from 10pm-2:30pm at Danny's Inn Conference Centre in Bathurst, over 80 stakeholders gathered to discuss the economic opportunities in the mining sector in NB. For a full list of attendees see Appendix A.

10:00pm	Welcome and Mingle
10:10pm	Welcome Remarks Minister Environment and Local Government and MLA Representing Bathurst Brian Kenny
10:15pm	Minister Energy and Mines – Donald Arseneault Remarks
10:30pm	Welcome and Introductions – Susan Holt – NB Jobs Board Secretariat
10:35am	Future of Mining – Marc Landry, VP IT and Logistics, Major Drilling
11:00pm	Brainstorming Growth Opportunities
12:30pm	Lunch
1:15pm	Conditions for Success
2:20pm	Premier Gallant Remarks
2:30pm	Next Steps and closing

WHAT WE HEARD

Participants were divided into 12 tables and asked to think about the future of mining in New Brunswick.

Imagine it is 2040 – What could the mining industry in NB look like?

This is a summary of their responses:

- NB is mining friendly
- More vertically integrated supply chain
- Infrastructure located in optimal location relative to mining activity
- First Nations training, mentoring to participate in the industry
- Mines clean-up after their operations
- Using a New Brunswick workforce that is trained and skilled
- Proper support in place (i.e. camping, catering) for workforce including First Nations
- More environmentally friendly
- Proper mining standards established
- Innovation in new technology will require smaller workforce
- Google Earth – NB dataset – joint venture Google & NB – all NB data in Google (environmental, regulations, etc.) training to users – great to attract young people
- 1) find deeper deposits (exploration), 2) Getting at those deposits (technology)
- Complete coverage of the territory will be known (geology)
- Technology available to process lower grade commodities
- Built in transportation industry, not just shipping ore out
- Recovering minerals that were left behind in tailings – reprocess, develop new technologies to extract the minerals and NB could become a leader in processing and this knowledge could be exported.
- Partnerships with forestry industry to harmonize exploration
- Mines will be smaller - will need centralized and customized milling
- Focus on other commodities – REE, Li, Cd
- Aggregates, clay, abrasives, etc. will be a focus to keep up with population growth
- Most of the present mines will be closed
- Public knowledge about benefits of exploration and mining through education in schools
- Clear regulatory roadmap for project development and consultations (on Google)
- New generation of interest in the industry
- Value added emphasis – look for opportunities (zinc, iron)
- First Nations prosperity (involvement, readiness, invest, partnerships, opportunities)
- Understanding scale of mining (size matters)
- Port of Belledune (energy, workforce, R&D)

Mining 2040 (continued)

- Training and skills – NB recognized as a centre of excellence
- Ensure infrastructure remains in place i.e. smelter (value added in NB processing)
- NB support development of renewable resources i.e. copper in batteries (energy storage)
- NB has large base metal camps i.e. Bathurst. Geological resource potential 100+years
- Diversified inventory – base metals, potash, Natural Gas, hydro carbons
- Royalty structure that reflects variation in commodity prices
- Tap into federal infrastructure money
- Build a bridge over Nepisiguit
- Educated population understands big picture
- Leaders promote the positives
- Communicate the risks, realities, positives, negatives
- Support for industry by government, citizens, communities, suppliers, First Nations, tree huggers, investors, labour
- Developed predictive models to evaluate/assess impacts of mining on the environment and how to work with it
- Possibility of off-shore deposits
- Robotics
- Investment confidence
- Ease of applications and permits
- Examples in BC and Nunavut – First Nations consultation and revenue sharing
- Mining industry is contributing 5%+ to NB GDP
- Tax regime that attracts exploration and development
- Deal with debt
- Fracking allowed
- NB exploration incentives are 10x current
- Water and well fields are protected
- Attractive energy rates
- One point of contact with the Province
- How will recyclables affect demand? New products create demand

What are the opportunities for growth in mining in the next 3 years?

Participants moved to 12 new tables and were asked to think about what opportunities would need to be considered in the next 3 years to realize the vision they want for 2040.

These opportunities are outlined below:

Incentives (8 tables mentioned this topic)

- Enhanced fiscal incentives for exploration and development
- Bring debt (\$12 billion + \$600M interest) “in-house” via newly created bank of New Brunswick (Crown Corp concept) which brings the process of providing funding for junior mining exploration along with supporting health and education needs
- GNB to support early stage studies (most help is needed by junior miners)
- Special program to incentivize projects near production
- Province/Government must produce predictive rules and regulations to enable investors to be able to commit to project development
- Attraction of new exploration investment by; a) ensure competitive royalty and corporate tax regime, b)ensure competitiveness with Quebec and BC in encouraging investment by individuals, c) technology innovation - improve integration of map data and GNB digital map database
- Accelerated capital depreciation on exploration and mining equipment, etc.
- Access to \$\$

Streamline Regulations (7 tables mentioned this topic)

- Streamline regulatory process including framework for agreements with First Nations and benefits sharing
- Better alignment between Federal and Provincial governments with respect to regulatory and environmental approvals of projects
- Expedite and standardize approval process
- Streamline regulatory processes without sacrificing intent

Land Access Policies (6 tables mentioned this)

- Land access for all ownerships including large land owners
- Australian model has created a balance between need for PNA and mineral exploration
- Currently only 43% of NB is available for exploration. We need to increase potential and remove barriers to finding and defining resources
- Forestry industry road work and new cuts available to prospectors and juniors
- Motivate exploration in under explored areas of NB
- Integrating road/building with prospecting and exploration

First Nations and Social License (5 tables mentioned this topic)

- Assemble best practices, evaluate, and implement where practical and beneficial for NB especially with regards to the consultation process
- Help getting social license, funds, and approvals for potential projects
- Use slow period to improve and refine consultation process with First Nations and all stakeholders
- Develop institutions/processes that deal with First Nations relations, revenue sharing, regulatory participation
- First Nation inclusion

Education and Skill Development (3 tables mentioned this topic)

- Reinvestment in education from school to PSE and infrastructure
- Framework – partnerships in training and development First Nations and general workforce in preparation for the upturn in the market
- Skills development and centralization of the workforce

Flow through R&D (2 tables mentioned this topic)

- Growth would come if money were available from public, i.e. flow through and from governments Federal and Provincial
- Increase exploration incentives
 - NB CEE tax credit 5%
 - RRSP like extended deadline to February 28th from December 31st
 - In CEE flow through grant incentives increase for grass roots projects

Support Existing Infrastructure (2 tables mentioned this topic)

- Port of Belledune
- Government Database
- Build on what we already have – leverage as much existing infrastructure as you can, currently underutilized

Promotion (2 tables mentioned this topic)

- Greater outreach by the Province through the Premier's office to exploration companies
- Promotion – use Saskatchewan model of provincial promotion

Other (each of these topics was mentioned once)

- Hire a GIS expert to assemble all data in intuitive framework and make the data available online asap – realistic timeline to complete 5 years+
- Modernize and remove barriers to develop unknown deposits as metal prices improve
- Belledune – bulk sampling for small mining operations
- Projects in the pipeline – Sisson, Caribou, Gold
- Government stability – long term stable finances and willingness to tackle unpopular public issues for the long term betterment of the province

What is working now and what needs to happen next?

Groups were divided by the major themes identified above and asked to discuss what is working currently within this opportunity and what needs to happen next to help it succeed.

Opportunity - Incentives	
What is happening now?	What needs to happen next?
<ul style="list-style-type: none"> ▪ Graduated royalties currently 3 year exemption ▪ NB PAP is ok ▪ NBJMAP is ok but needs continued funding ▪ Incentive programs – early stage exploration, prospectors, junior grants ▪ Environmental regulations are clear for exploration and production – one stop shop excellent ▪ Mining act is very good 	<ul style="list-style-type: none"> ▪ Graduated royalty should be decreased to 1.5 year exemption ▪ Increase NBPAP ▪ Increase NBJMAP ▪ Re-Introduce NBDEP (Deposits evaluation program) ▪ Change to graduated royalty – 2.5% pre-tax ▪ Need flow through incentives – adopt and accelerated flow through program

Opportunity – Streamline Regulations (without compromising environmental integrity)

What is happening now?

- Government support is there
- Willingness to work together
- Permitting process is communicated effectively with departments
- Robust regulations
- Province holds an open door policy and decision makers and stakeholders are available for discussion and participation in the projects and process
- Province promotes well the province as a place to do business/good at sales – but be ready let's not over promise and under deliver
- This mining summit is a great forum to find a productive path forward

What needs to happen next?

- Appoint a contact within government that will push the process along
- Develop a roadmap/process with timeline that will help guide through the process
- Public consultation should focus on solutions or approving projects instead of stopping projects
- Common harmonized process between the federal and provincial government – have a means to communicate and understand with is working and what is not to develop common requirements
- Business owners/investors/stakeholders need to feel confident that the government have adequate human resources to undertake the approval process required. Concerns lay with civil servant budget cuts will in some way slow down the process.
- Have an improved consultation process in place at the beginning and all parties, communities, cultures, etc. be represented for that the project approvals flow downstream
- Gap between First Nations and permitting process
- Gap between federal and provincial (federal is complex) (provincial is compact, simple and open to dialogue earlier in the process)
- Various layers of government overlap in the process
- Solution – Mandate of Regional Planning Commission needs clarification (municipalities included)
- Solution – Setting specific timelines for each step of the process
- Solution – Clarify the roles of various governments and within government
- Solution – Needs to be clear contact or owner in government to help guide companies through the process.
- Solution – Develop a roadmap/process for federal and provincial regulations regarding First Nations consultation and permitting

Opportunity – Social License

What is happening now?

- People are asking valid questions
- More awareness
- Early engagement/training/employment
- Consultations are happening

What needs to happen next?

- Driven by perception
- Better communications by company to the public
- Talk about the facts to address natural human emotional reactions
- Definition of consultation process vs information sessions
- Define hard choices, goal, stakeholders
- Education and communication
- General knowledge base – early, balanced, appropriate
- Steps – define, increase knowledge, communicate

Opportunity – First Nation Partnerships

What is happening now?

- Relation with PNB and First Nations Partnerships - consultation
- Industry is reaching out, government could do better with a clearer consultation process
- Tax incentives are working
- Relationship with Trevali is a good model
- Sisson mine engagement on artifacts and recognizing
- Recent recognition of duty to consult – bridges being built and barriers being removed

What needs to happen next?

- Better cultural understanding
- More recognition of First Nations potential in moving industry forward
- Joint ventures are missing
- Move from consultations to partnerships
- Reconciliation is about partnerships
- Obligation on First Nations to tell their story
- Complete set of protocols (consultation, engagement, etc.)
- Greater understanding of duty to consult
- More employment opportunities
- Greater opportunities to participate in projects and benefit from them
- Extend business and contract opportunities to First Nations
- Improved education and training programs give First Nation individuals skills needed
- Education and awareness of past contributions of First Nations and their views

Opportunity - Infrastructure

What is happening now?

- Good highways other than the 180
- Relatively cheap power
- Proximity to the ocean – open water year round
- Proximity to markets
- Port of Belledune
- Irving Refinery
- LNG Terminal
- UNB

What needs to happen next?

- Port of Belledune marketing campaign worldwide – increase utilization 30%
- Need railway system – transportation to and from ports
- Irving refinery and LNG terminal underutilized – promote this infrastructure to attract investment
- Need access to the North growth – twin 180
- There should be top of the line education system from entry to post-grad = greater economy (i.e. Waterloo, U of Ottawa, McGill, etc.)

Opportunity – Flow through R&D

What is happening now?

- 100% deduction on flow through federal + 15%
- NB Small Business Investor Tax Credit
- R&D doesn't work for exploration

What needs to happen next?

- Deduction too low, increase tax deduction super flow through – 150%
- Another component via NB government 5% or 100% amount (T101)
- Brokers not currently helpful, banks need to free up cash for exploration efforts
- Encourage public to support Small Business Investor Tax Credit for local prospectors and juniors in their projects
- Expand and broaden parameters for R&D to include certain costs for admin, etc. 40% recovery on costs. i.e. bulk sampling programs
- Too difficult to process flow through – bureaucratic process
- Reactivate funding of application for advanced exploration technologies
- R&D credit for grass roots up to delineation drilling (30%)
- Extend the annual FTS deadline from Dec. 31st to February 28th.
- Enhance FED METC from 15% to 30% as proposed by PDAC. NB to match with similar amount for 3 years

Opportunity – Training and skill development

What is happening now?

- Prospecting courses
- Community college – response to industry, First Nations, clients. Customized training, trades , WES, environmental monitoring, miner 1, mill operator, arch courses
- UNB Geo Engineering
 - Environmental
 - Mineral resource
 - Geotech
- Chemical engineering
 - GGE
 - Mechanical engineering
- Earth sciences
 - Mineral resources
 - Environmental
 - Energy resources
 - Archeology

What needs to happen next?

- Department of education should be teaching geo science in high school
- Spend money on education
- Enhance First Nations training
- R&D investment

Opportunity – Data and Technology

What is happening now?

- FTP site is hard to use
- Claim staking system is very good

What needs to happen next?

- The FTP site is basically inaccessible. It is a good system but does not work with Windows 7 and beyond. Designed for Windows XP and needs to be updated for Windows 10
- Better connected data delivery (web server, Google Earth, etc.) one stop shop
- Link to other land use
- Data compilation
- Requirement to file data digitally
- Lidar (release to public)
- Update MOD (information and better service)
- Better mapping of roads
- High resolution EM CV TEA
- Improve data collection and storage, no core to be destroyed
- Mapping information up to date
- List of dormant reserves and accountability
- Access to technology – 4D drill hole instrument

LESSONS LEARNED

This summit was the seventeenth in a series of sector specific Opportunity Summits throughout the province therefore much was learned to improve for the future summits:

What went well

- Good attendance
- Great participation in the discussions
- Lots of subject matter expertise in the room, well informed participants

What could be improved

- More gender and age diversity in the participants
- Sharing of participant information at tables
- Combination of location and timing – if more remote, consider mid-week dates

NEXT STEPS

Summit Survey

Following the summit a survey was sent to the participants to collect additional input on the ideas discussed and the event itself. This feedback helps us to assess which discussions resonate beyond the summit, as well as to continue to improve future summits.

Summit-Specific Report

Following each summit a report of the ideas generated (this document) and participant feedback (Appendix B) is shared with all participants following the summit.

All-Summits Report

After the full series of summits have been completed a final report will be prepared and shared with all summit participants. This is meant to provide visibility of the ideas generated from other summits and to highlight common themes related to the opportunities.

Early Opportunities

The Jobs Board Secretariat plans to identify and advance initial opportunities coming from the summits in partnership with Opportunities NB and lead departments, and to test the opportunities-model of economic development using the 5-policy pillar structure on these early opportunities. We will also identify opportunities that would benefit from further study and those that government is not well-positioned to lead, and share this assessment with the community of participants and interested New Brunswickers.

Implementing Policy Conditions for Growth

Finally, with your help, we will identify the best growth opportunities for New Brunswick. The Jobs Board Secretariat will support the formation of cross-departmental teams, the development of opportunity plans and measures, and assist in the implementation of the necessary policies to create the conditions growth. GNB will then track the progress and outcomes of these efforts and report those findings.

Future Summits

Consideration is being given to hosting follow-up summits in late 2016 and early 2017 to explore whether this approach is demonstrating early results, discuss how it could be improved, and what has changed with the opportunities for NB's economic growth.

APPENDIX A: ATTENDEES

Name / Nom	Organization
David Paul	ARC Consulting
Louis LeBouthillier	Atlantic Canada Opportunities Agency
Gilles Thériault	Bureau de Hon. Serge Cormier (Acadie-Bathurst)
Kristin Banks	Canadian Institute of Mining, Metallurgy, and Petroleum (NB Branch)
Stephen Brunet	City of Bathurst
Michel Doucet	Collège communautaire du Nouveau-Brunswick (Bathurst)
Sandenn Killoran	Contendo Training Solutions
Russell Crosby	Crosby Consulting & Exploration Services
Dallas Davis	Dalmin Corporation
Jonathan Friolet	DF Contracting Inc
Geoff Allaby	Dillon Consulting
Gordon Labillois	Eel River Bar
Mike Buzas	Elmtree Resources
Mike Flanagan	Fancamp Exploration
Andrée Bolduc	Geological Survey of Canada
Marc Duchesne	Glencore
Normand Dupras	Glencore
Earnest Brooks	Independent Geologist
Peter Gummer	Independent Geologist
Richard Mann	Independent Geologist
Sharon Taylor	Independent Geologist
Karen LeBlanc	JEDI
Kim Nash-McKinley	JEDI
Donald Desforge	Lantech Drilling
Marc Landry	Major Drilling
Malcolm McLeod	Malcolm J McLeod Geological Consulting
Bernie Swarbrick	Maritime Iron
Christian Derosiers	Murray Brook Minerals
Errol Persaud	New Brunswick Community College (Fredericton)
André Pelletier	New Brunswick Innovation Foundation
Elisabeth Spatz-Diveto	New Brunswick Prospectors and Developers Association
Danik Boudreau	Port of Belledune
Tim Lavoie	Prospector
Roland Lovesey	Prospector
Wayne Stewart	Prospector
Frank Ross	Prospector
Mike Scott	R.D.M. Group
Leo Cheung	Research Productivity Council
Dennis Killoran	Sancon
Mike Taylor	Slam Exploration
Jeffrey Barrett	Stantec
Stefan Kruse	Terrane Geoscience Inc./Terrane Aerial Mapping

Name / Nom	Organization
Greg Davidson	The Sisson Partnership
Louise Steward	The Sisson Partnership
Marc Thorne	Town of Sussex
Arthur Slipp	Town of Woodstock
Paul Keller	Trevali Mining (Maritime) Ltd.
Raymond Murphy	Union of Municipalities of NB
David Lentz	University of New Brunswick
Laura Araneda	Vic Progressive
Albert Vickers	Vickers Geophysics Inc.
Rod Thomas	Votorantim Metals / President PDAC
Art Hamilton	Wolfden Resources

GNB Participants	
Premier Brian Gallant	Premier's Office, Minister responsible for Innovation
Perry Haines	NB Department of Environment and Local Government
Gaston Richard	Post-secondary Education, Training and Labour
Tom MacFarlane	NB Department of Natural Resources
Cade Libby	NB Department of Natural Resources
John Smith	NB Department of Aboriginal Affairs
Donald Hammond	Opportunities New Brunswick
Marie Larivière	Opportunities New Brunswick
Steve Milbury	Opportunities New Brunswick
Brent Suttie	NB Department of Tourism, Heritage, and Culture
Hon. Denis Landry	Minister responsible for Natural Resources
Hon. Brian Kenny	Minister responsible for Environment and local Government
Hon. Donald Arseneault	Department of Energy and Mines
Jean Finn	Department of Energy and Mines
Keith Endresen	Resource/Exploration/Development
Bill Breckenridge	Business Development and Community Relations
Les Fyffe	Geological Surveys Branch
Craig Parks	Policy and Planning
John Griggs	Resource/Exploration/Development
Jim Walker	Geological Surveys Branch
Kay Thorne	Geological Surveys Branch
Mary Ann Mann	Business Development and Community Relations
Hemant Kumar	NB Job Boards Secretariat
Susan Holt	NB Job Boards Secretariat

APPENDIX B: PARTICIPANT FEEDBACK

Surveys sent / sondages envoyés – 54

Responses received / réponses reçus – 41 (76%)

Our objectives for the Mining Opportunities Summit were:

Nos objectifs pour le sommet des possibilités dans le secteur minier ont été :

Information Gathering / Collection des idées

- Identify a long list of strategic economic opportunities for mining industry growth to explore / Identifier une liste des opportunités économiques viables pour explorer
- Identify conditions for success in identified opportunities / Identifier les conditions de réussite pour les opportunités identifiées

Participant Experience / Expérience des participants

- Participants had a positive experience and their contribution mattered / Participants ont eu une expérience positive
- Participants felt heard / Les participants se sentent entendus

Answers are provided in the language they were given. Les réponses sont fournies dans la langue qu'ils ont été reçus.

Q1. Which opportunity discussed most interested you?/ Quelle opportunité discuter vous intéresse le plus ?

Theme - Financial Incentives / incitations financières

- "Tax Incentives for Junior Mining Companies"
- "Investment, Flow through financing and R&D"
- "Tax credit matching BC recently announced 20-30 percent, but flow through to taxpayers funding exploration/prospecting as well as research in all other fields."
- "The proposition to create and own The Bank of NB."
- "Incentive"
- "Exploration financing"
- "Near term fiscal incentives"

Thème – Data / données / technologie

- "Remapping of newly recognized high mineral potential areas in the Bathurst Mining Camp such as the Fournier Gp and this is urgently needed"
- "integration of data sets"
- "I found that the most interesting opportunity exists in: 1. recognizing that NB has a lot of natural resources, a great database of information and is a respected jurisdiction for exploration & development; 2. NB should seize the opportunity to capitalize on the abundant technical database by organizing ALL the technical data into a single GIS system (i.e. hire perhaps 2 GIS experts with an initial 5 year mandate to do accomplish this and (2.) use this professionally updated database as perhaps the major selling point to interest investors / explorationists and mining companies to take a serious look at NB as a place to invest)"

- “Making NB more receptive to mining development via vehicles like: detailed GIS mapping, LIDAR, flow-through shares”
- « Système de collecte de données au sujet des mines. »
- “Access to New Brunswick Complete LIDAR coverage - to enhance mapping, modelling and planning operations.”

Theme – processus et programmes du gouvernement

- “Permitting process”
- “Clarification of the Consultation process and synchronized EA process”
- « L'amélioration continue du processus décisionnel lié à la réglementation. Il faut avoir la conviction de nos moyens. De prendre les décisions difficiles pour développer nos ressources naturelles et de permettre la mise en place d'un modèle de financement plus flexible pour encourager l'investissement et le développement. »
- “Streamlining the regulatory approval process to help companies derisk projects and raise capital. There are multiple projects that are stalled in the approval process. There are opportunities to improve without compromising our high environmental, health and safety standards.”
- “Reducing duplication in processes / creating the right environment for investment”
- “How government could help the mining industry”

Thème - First Nations / Premières Nations

- “First Nations Partnerships”
- “Geoscience issues/Aboriginal engagement”
- “Engagement with First Nations”
- “Aboriginal Relations”
- “Consultation and Partnerships”
- “first nations involvement and roadmap to expedite regulatory permitting to seize timing of mining opportunities”

Other / Autres

- Conditions for success discussion x2
- “catalysing exploration success”
- “Education and the need to develop a center of excellence for Mining here in NB. It will lead in mining innovations and studies setting the ground work for NB to recognized as a mining leader in the world market.”
- “Training Development and Education”
- “The Australian model for land”
- “The sison brook mine”
- “Better opportunities in regards to attracting more Mining Companies to New Brunswick”
- “leveraging existing infrastructure”
- “Future of the industry and perception thereof.”
- « l'avenir de l'industrie minière et les solutions pour améliorer »
- « Acceptabilité sociale; exploration des régions (y compris en profondeur) non-explorées »
- “Environment”
- « Le potentiel minier des dépôts à basse teneurs qui sont localisés dans le secteur de Bathurst »

Q2. How do you feel that your contributions were heard?/ Comment pensez-vous que vos contributions ont été entendues ?

Not at all / Pas du tout – 0%

A bit / Un peu – 24%

A lot / beaucoup – 51%

Completely / Complètement – 24%

Q3. L'élément le plus important que j'ai retenu suivant le sommet est : / My biggest take-away from the Summit was:

Theme - Collaboration / Interaction / Goodwill-bon vouloir

- “collaborative group including Government persons”
- “Degree of participation by large variety of stakeholders”
- “None, particularly. It was all engaging.”
- “A somewhat positive attitude to the future of mining in NB.”
- “Getting together with colleagues in the mining industry and putting our ideas together in order to facilitate Mining Regulations for NB”
- “Government and stakeholders / private sector working together”
- « La volonté des gens dans la salle à se retrousser les manches pour développer le secteur de concert avec la province du NB »
- “A sense of optimism and shared commitment.”
- “The opportunity for input of ideas. Group brainstorming is such a valuable thing to do when trying to find ways to improve situations.”
- « Volonté réelle de faire avancer le domaine minier au NB »
- “meeting industry reps could be beneficial for my organization”
- “Networking”
- “The networking part, getting to know different people within the mining sector, from different organisations, governments and companies.”
- “I really have never had difficulty getting my opinions heard and sometimes taken seriously. Even during the 26 years I have been submitting my input.”
- « les bonnes idées en général des participants »
- “We can achieve a lot when all parties are working together.”
- “Apparent willingness to move forward collectively - both public and private sectors.”
- “The (mostly) unified take on problems and solutions from a very diverse group (private and public sectors)”
- “there is great cooperation between all attendants, everybody is ready to work together”

Thème – engagement du gouvernement / Government Commitment

- “You are listening to and including First Nations”
- “an excellent way to relay industry issues to government”
- “The government is seriously looking for a way forward and is wide open to considering realistic proposals to help the province move ahead.”
- “An impression that the Government really wants to develop the province and create jobs. It is a dynamic team, relatively young but with experience. They show their desire to be helped by the specialists and participants.”
- “The Premier's commitment to review and act on ideas presented at the forum”

- « La volonté du gouvernement d'agir des maintenant pour l'avenir du domaine minier »
- “Government seems to be listening. I am not surprised. It will be interesting to see when, or if, they stop.”
- “Genuine concern and interest in NB's mining sector and a willingness on the part of government to reach out to the industry for ideas/solutions.”

Theme – need for support / besoin d’aide

- “that this high tech industry is in need of support to reap the greatest impacts in finding new mines (exploration) and developing new mines in the future.”
- “Mining is an increasingly archaic industry that requires a great deal of time, capital and market force in order to succeed.”
- “Our provincial revenues from mining are fading and corrective action is required to ensure that we are positioned for the next upturn in the commodity market. NB needs to be nimble to compete.”
- “The industry requires constant effort to meet the many challenges”

Thème – potentiel futur de l’industrie / the potential of the industry

- “We have a tremendous mining potential in this province and we need to find vehicle(s) to take advantage of them”
- « Qu'il y a encore des ressources qui pourraient être exploité avec des investissements du secteur privée. »
- “A lot of work remains but the province is in a good position to reap the rewards once the markets shifts if we plan today so we are ready for tomorrow.”

Other / Autres

- “The need to enhance the approval process. Bringing in Juniors to the market”
- “There is no silver bullet and there are many things that the Province needs to get right to see growth and success in the mining sector”
- “We have been working independently on a training program that is the same model as CCNB. We will work to see if there are areas that we can collaborate to maximize the benefits to our employees and interested students.”
- “In addition, proponents need guidance concerning meaningful engagement of First Nations.”
- “The wish by industry to have a clear road-map for approval and their willingness to accept the need to obtain a social license.”
- “the Discussion and feedback from the different groups”

Q4. S'il vous plaît évaluer les éléments suivants du sommet / Please rate the following elements of the summit:

	unsatisfactory / insatisfaisante	neutral / neutre	good / bon	great / excellente
Venue/ Lieu	2%	17%	34%	46%
Timing/Calendrier	2%	0%	24%	73%
Refreshments/Nourriture	2%	12%	46%	39%
Faciliator/Animateurs	0%	2%	29%	68%
Agenda/Ordre du jour	0%	7%	29%	63%

Comments / commentaires

- “After the meeting, we are more encouraged to do our best for the development of the Province. But as mentioned by several participants Money is the key.”
- “Danny's Inn was not a great location, although I understand why it was held there. Rodd's in Miramichi would have been a better venue.”
- « Excellente rencontre! L'heure est maintenant aux décisions. Ma plus grande crainte c'est de retrouver dans une salle similaire dans 5 ans à parler des mêmes défis. Il faut continuer à progresser. La bonne volonté des gens et du gouvernement semble être présent. »
- “Great initiative ONB! Hope to see more of these. Maybe even cross industry ones.”
- “Great session, but the format still favored "talkers"/extroverts. Despite instruction, discussion at tables was still monopolized by one or two people.”
- “I applaud the effort the government is putting into these summits and I thought there was great representation of people from across the industry, however it would have been nice to see more First Nations at the meeting, and hear from them on what we can do better as a government and a society in general to make them feel like part of the process, and share in the success of these projects. Nice to see positive feedback on the Trevali Partnership.”
- “I like the fact that you supported a locally owned business by having the summit at Danny's.”
- “I really liked the format of the event, mixing everyone with different activities. I also liked the presence of the PM and Ministers, it show's their level of involvement in the Mining sector, which is re-assuring, for service providers (contractors) like me.”
- “I would have liked to have had the 'tables' more formally selected with each group provided opportunity to better address specific metals and minerals socio-economic issues.”
- “it could have started at 9am, & we might have gotten deeper into understanding all the complexities of MinEx & Mining.”
- « J'ai été agréablement surprise du déroulement de la journée. Par contre, une fois les tables mélangées, le français se perd un peu... »
- « La presence du Premier Ministre donne du lustre a ce type de meeting, bravo! »
- “Looking forward to attending any and all other Mining Summits.”
- “The elements of the summit were completely satisfactory. Although it was appropriate to hold the summit in the Bathurst area, many folk traveled from Fredericton and possible from a greater distance than that. Therefore a more central venue might be more appropriate for a future summit.”
- “The meeting progressed pretty well on schedule and the cross pollination of ideas achieved by having participants move among the tables for each topic was fruitful.”
- “The summit provided a great opportunity to share ideas. It is important for industry, First Nations and government to collaborate to ensure we are competitive in today's global economy.”
- “The summit was very well organized and in my opinion highly productive. I particularly liked the idea of changing seating positions and sharing and discussing ideas with others.”
- “This was a great networking opportunity and I would have liked to see an opportunity to get like-minds together for some strategizing on common issues.”
- “Very effective approach to get the most in a short time. “
- “Very effective method for getting the most from a diverse group”
- “Well done. Productive.”
- “Well done. We need to explore and capitalize on ideas to set the stage for the next economic leg up”
- “Well organized. Note that if I did not think so I would have said so. My policy is that no-one gets top marks, so second from top is about as high as you can go.”

Q5. The best part of the Summit was / La meilleure partie du sommet a été :

Theme – Networking / Participants

- Networking x4
- “The networking and representation from senior officials.”
- “The opportunity to network with other participants.”
- “Meeting and finding out who is working in this sector”
- “Interaction with like-minded people”
- « Échange avec les participants. Chacun apportait une perspective différente selon son domaine d'expertise »
- “Overall discussions pertaining to all aspects in the Mining Industry”
- “Having participants (stakeholders) with the wide variety of skills/ professions/ interests etc represented and actively participating”
- « de discuter avec plusieurs gens du milieu des mines »
- “The quality of participants”
- “Seeing both the government and the industry working together”
- “cross sectional group representation”
- “The broad representation of participant interests related to mining.”
- “the interaction and moving around from group to group”
- “changing tables at each questions permitted for good networking, generating new ideas each time”

Thème – discussions aux tables / Table discussions

- “The Facilitated session-1”
- “The best part of the summit was the third discussion where we chose the issue to discuss because all people with expertise were together.”
- « Les discussions autour des tables »
- « les échanges aux tables de travail »
- “Participation in various working groups. It was good to change up the groups.”
- « Les rencontres de petit groupe pour discuter de divers sujets. »
- “The table discussions”
- “the breakout sessions, with different groupings.”

Theme – Structure and Consensus / structure et processus

- “Structure and format was great. Not sure much more could have been done to encourage participation.”
- “the fact that you did it and promise to do more”
- “Focussing of problems and thoughtful, possible solutions
- “The level of participation”
- “The consensus on problems and solutions for diverse group with varied interests”
- “Everyone seemed to have the same concerns”

Other / Autres

- “The presence of the Premier/senior minister and aboriginal leader.”
- “Premier's "take away" address at the end”
- the end summary x2
- “assurances that action would result from discussions”
- “I enjoyed the talk the first speaker Marc Landry gave. His positive attitude set the tone for the entire summit.”

Q6. The least valuable part of the Summit was / La partie la moins utile du sommet a été :

Theme – Nothing / Rien

- n/a x 3
- “No issues”
- None x 3
- “nothing of little value...”
- « pas vraiment de partit non utile »
- “Everything on the agenda seem valuable”
- “Everything was valuable”
- “I cannot think of what this might be.”
- “In all regards the roundtable was a valuable use of my time.”

Thème – éléments logistiques / Logistical elements

- “changing tables?”
- “did not know who was attending prior to the beginning of the meeting so not able to plan to meet with individuals the evening before or for breakfast”
- “participants should have introduced themselves”
- “The constant switching between tables - good for networking but hard to have full discussions.”
- “the very first.”
- “time could be compressed?”
- “presenting the ideas after the discussions, with no opportunity to expand on the conversation”
- “the casualness - next time make it more issue focused with specific outcome objectives”

Theme – length of speeches and presentations / les discours

- « La longue ligne des presentateurs (nécessaire malgré tout) »
- « La moitié de rapportage de la première question, tout ou rien... »
- “the introductory remarks”
- « Les discours »

Autres / Other

- “Reiterating support for familiar popular trends, which everyone already agrees on, such as aboriginal participation & duty to consult . Also, further refinement of tax credits to entice investors. These things are always in play, with or without a "summit".”
- “The effectiveness of the Summit will be measured on its ability to affect positive change. Overall I think there were several good ideas presented at the Summit and commitment to provide regular progress updates to participants would be helpful.”
- “The Premier is speaking too fast.”
- “The story period of presence by the Premier.”
- “Wouldn't really say anything was unvaluable. A lot of topics were put on the table, and some thought should go into what ones will really make a difference, and what are minor inconveniences to a small group of people in the industry.”

Q7. Où aimeriez-vous voir le gouvernement concentrer ses efforts pour appuyer la croissance du secteur miniers / Where would you like to see government focus their efforts to help grow the mining economy in NB?

Theme – Financial Incentives / incitatifs financiers

- “Provide enhanced incentives to motivate the exploration of the basement rocks at the bottom of the Carboniferous cover rocks. Known magnetic anomalies can be characterized using geochemical soil gas hydrocarbon analytics as explained in the paper entitled: Cutting Edge Geochemistry Detects Organic Signatures in Surficial Samples Originating from Bacterial-Mineral Interactions to Locate and Identify Deeply Buried Exploration Targets by Sutherland, D.”
- “Short term fiscal incentives to provide support for the industry”
- “subsidy programs, tax incentives and flow through share program”
- « dans l'aide financière au compagnie et prospecteur qui est la base de l'industrie »
- “development of a low-cost electricity program for industry and other businesses to make processing and production cost competitive.”
- “Realigning the flow-through share deadline to the end of February is a specific action that would help attract investment in NB.”
- “Flow through shares,”
- “Continue to encourage the Prospectors and Junior mining companies with the grant programs.”
- “Financing is teh biggest problem. Witjout that there is no avenue forward. However, government funding is not the way to go, partially, but not all the way. Revamp the NB Securities commmission and get it out of Saint John to where it is needed and not in the shadow of the biggest and wealthiest. There should be a national SC that is on a level playing field with the entire country.”
- “Incentive and funding to the exploration and mining companies”

Thème – stratégies d’attraction et de développement / Attraction and development strategies

- « Développer une stratégie pour attirer des investisseurs »
- “Being competitive in attracting exploration funding by investors and likewise fostering research that builds NBs international name as a centre of innovation and entrepreneurship.”
- “maximizing economic potential of our mineral deposits ensuring jobs are maintained and New Brunswickers benefit from our natural resources.”
- “positive growth in the industry while keeping in mind that there has to be some gains for the province and not just industry”
- « Supporter les juniors et les prospecteurs jusqu'a la reprise des marchers dans 1-2-3 ans... »
- “Several areas. Top for me would be to develop a clear "vision" for the province in the mining (and energy) exploration goals, and to relay the message to the public in a timely and effective manner. Relatively recent and recent policies decisions/procedures, for whatever reasons, have been made midstream in industries efforts to develop in the province. Examples include the essentially cessation of uranium exploration efforts, cancellation of underground storage projects, slow and limited response to potash projects and shale gas moritorium. These have had major impacts on the monetary side for industry and have and will have serious implications in perception for the province (really open for business or not?). Coupled with this is the need for the province to be more active in industries to acheive social license. Lastly, the province has developed an incredibly effective organization to encourage and guide mineral exploration second to none. This should be maintained and expanded upon re their human resources. I look at this as a very important type of "infrastructure" of the human kind.”

- “should have a person designated with mining background to promote industry by visiting mining companies and showing what new initiative we have put in place - turnkey solution”
- “1. Totally revamp all the abundant technical data into an up-to-date , state-of-the-art user friendly, easily publicly accessible format ,; and (2) much more salesmanship by the government in selling our potential. Representation at a couple of annual trade shows is not good enough. It helps, but the real push has to be by personal contact of high ranking, knowledgeable gov't officials with senior corporate CEOs or VP (ie the "decision maker"!)"

Thème – amélioration des processus / process improvement

- « Faciliter les processus pour l'approbation des projets »
- “Process improvement”
- “streamlining the regulation process to make sure Sisson Brook goes into production as this is the example that other companies will use when they make their decision where to invest in the future”
- “Streamlined permitting and permit management process Federal and Provincial”
- « Mettre en place un climat d'investissement propice au développement du secteur et diminuer les lourdeurs administratives sans mépris à l'environnement afin de permettre des décisions plus rapides »
- “Oblige the forestry Department to submit to DEM at least one year in advance, plans showing the lumber roads to be built and wood lots to be cut. This information is essential to us and would save a lot of time and money.”
- “making it easier for industry to develop the mining i.e. be predictive with respect to environmental, land claims and other hurdles.”

Thème – Investissements dans la recherche et l'éducation / Research and Educational investments

- “Short term, exploration programs, Longer term development of an innovation partnership with an education institution. (Similar to Marine Institute in NF)”
- “supporting early stage studies”
- “Public geo-science and R&D.”
- “better educating our younger people in regards to the mining industry”
- “Mineral Exploration research”
- “NB must be ready when the markets turn around in mining. Focus on workforce readiness to help people gain skills and experience.”
- “Empower the North Shore by aggressive classroom and extracurricular Education and clubs for the north shore focusing on three family and commercial sector opportunities - minerals/prospecting, rural agriculture, urban farming (aquaponics). AND WHILE MOVING FORWARD WITH THESE IDEAS, capture the real essence of how we actually survive - have the students and club members document the use of metals and minerals in their daily lives.”

Theme – First Nations Relations / relations avec les Premières nations

- “Have a consistent and clear Consultation process with First Nations so projects would happen smoother”
- “Commitment to develop an institution and processes to deal with aboriginal issues around jurisdiction and participation”
- “Settling native land claims.”
- “Improving Consultation process with First Nations - strong regulations and obtaining a social license for their projects seemed to be agreed upon by all.”
- “First Nations engagement and advancing social licence for the industry.”

- “I can't speak to tax and investment strategies which are important, but from my perspective I think there needs to be a focus on developing Partnerships with First Nations, and moving away from the current "consultation" process. Partnerships will ensure that everyone's best interests are looked after.”

Other

- “Top of the list for me is in two parts. First to “
- “1. Initiatives to get from prospecting to developing. 2. Consultation to Partnerships. 3. Transportation 'Road Map' Strategy.”

Q8. What is something you can do to support the growth of the mining sector in NB?/ Que pouvez-vous faire pour aider à la croissance du secteur minier à Nouveau-Brunswick?

Theme – Promote / promotion

- “NB is one of the most favorable mining jurisdictions in Canada”
- « Promouvoir le potentiel minier de la province. »
- « Promouvoir ce secteur »
- “Continue to promote the exploration/development industry wherever and whenever possible at conferences, trade shows, etc.”
- “I can discuss exploration opportunities in New Brunswick with colleagues when I am at various national conferences, focusing on the low cost of exploration because of good infrastructure.”
- Help promote an awareness of how much mining means to NB.
- « continuer à promouvoir mes propriétés minières à des compagnies à l'extérieur du Nouveau Brunswick pour les inciter à investir au Nouveau Brunswick »
- “As a consulting geologist, I can act as an ambassador of NB to intercede with public or private mining companies”
- “Continuous contact with peers elsewhere in Canada / world and tout the numerous merits of working here”
- “Spread the word in Canada and internationally.”

Thème – la recherche et l'éducation / Research and Education

- « Continuer à soutenir la recherche scientifique dans le domaine de l'exploration minière »
- “Continue Training Aboriginal Workforce with help from Provincial/Federal “
- “Better educating the people of New Brunswick in regards to maintaining safe and sanitary work relations with all walks of life.”
- “Create mining competency training packages.”
- “continue to lead research at UNB in Applied MinEx research”
- “Work to advance a coordinated training program for drilling and miners.”
- “Align NBCC's program offerings to respond to educational and technical needs in this sector.”

Theme – participate and communicate

- Continue to advocate for responsible resource development and inclusion of First Nation participation
- Participate in any initiatives brought forward by government to improve industry conditions
- Work with First Nations to identify training and employment solutions and providing opportunities to gain experience.

- Also, need to empower the north shore emerging workforce to become (more) self supporting by recognizing that mining is not the be-all and end-all , that they themselves must diversify, and that rural agriculture and urban farming offer long term self sustaining, environmentally friendly, family and commercial opportunities.
- I would be pleased to participate in a focus group that the government may assemble to help implement recommendations from the summit.
- Feedback positive and negative information with respect to the bottlenecks encountered and solutions, support programs such as training and development of local personnel for future development and refinement
- Attend more events of this nature. Offer logistics support and input to mining companies.

Thème – Offre de services et développement d’expertise / Develop and offer expertise and services

- offer our services to miners wanting to work here
- Providing education/technical expertise.
- “I’ve lived in NB all my life, and want to continue to do so. I currently manage a group of engineers and technicians who work on projects across Canada and in the US. I will continue to develop the area of expertise (mine waste management and mine closure) so that we will have world class expertise right here in the Province. This will help ensure that mine projects are developed in a sustainable way, that is both economical for mining companies, and environmentally responsible.”
- “We supports the industry by contributing our expertise to solve technical problem that arises.”
- “Our company has developed project control software utilized in teh oil and gas industry which has driven down the cost of Commissioning and enhanced the quality and operating efficiency of teh facilities. This software can easily be adapted to support Mining project to assist in cost and quality control.”
- “Improve archaeological modeling using LIDAR - continue to work closely with FN representatives and ensure a straightforward review process for projects.”

Theme – Continued projects and support / Soutien continué des projets

- “Apply for a prospector grant and start evaluating magnetic anomalies using soil gas hydrocarbon techniques.”
- “We are currently working on a significant project in NB (port of Belledune)”
- “continue our current exploration efforts”
- “Continue prospecting;”
- “Me, You mean? I do it all the time. I have brought over 100,000,000 \$ C in investment the industry to date through my efforts. Both as a past Pres of teh NBPDA but more particularly through my property options. Unfortunately that includes Blue Note, but they at least proved the metallurgy at the Caribou deposit and the mill would not have been to where it is today If I had not made that fateful call to a friend in Calgary and staked the claims that I did.”
- « Soutenir l’industrie avec des programmes de formation adapté à leurs besoins. Flexible, à point et ce dans les deux langues. Être un véritable partenaire »
- “Be proactive and supportive in our outlook as a municipal organization”

Q9. Please share any other feedback you have on the Summit / Veuillez nous faire part d'autres commentaires que vous avez sur le sommet.

Thème – éloge / praise

- Excellent format! La présence des ministres et du Premier ministre était fort apprécié.
- Thank you for including First Nations in the process and working towards recognizing and respecting our Aboriginal & Treaty Rights
- Thank you for the opportunity to participate.
- Très bonne initiative. J'avais peu d'attente sur ce sommet, mais l'expérience a été très positive.
- One of the best, and enjoyed the changing of tables whereas you had an opportunity to hear from all in the mining industry
- Glad to be invited, thank you for organizing!
- There was good representation of the stakeholders. It was well organized and gave all participants an opportunity to be heard.
- Good overall program
- As a tax payer in NB I like the idea of these summits, which essentially provides the province with a day of "free" advice from the top people in each sector.
- Permitted to make more contacts and to keep in touch with other members of the mining sector
- There is a reason the province is No. 1 with prospectors and we need to get the word globally.
- Great summit and hope this will be a yearly event so we can all contribute and collaborate
- Pleased that we had an opportunity to be part of the proceedings.

Theme – Importance of action / l'importance d'agir

- let's make sure that these ideas translate into action
- It was well done and will require a dedicated follow-up by both government and industry to evaluate and act on the ideas presented
- make sure action derives from this summit
- I am looking forward to the report(s).
- Although I crashed the summit, I was encouraged by the level of turn out. I would say a good next step would be to create follow up meetings with smaller diversified groups to do deep dives into particular opportunities.
- Metals and minerals should not be treated in isolation. Think of our sector more as "metals, minerals, and mankind". ("3M") I think a list of all participants with their areas of expertise would be of interest. Perhaps this could lead directly to a "Summit Task Force" on specific issues. Please move this effort forward.
- There was a lot of good representation at this event and I would like to think that there will be some action items generated with names of responsible people and time lines attached.
- Look forward to summaries of findings

Thème – Grandes idées / Big ideas

- Establishing a Bank of New Brunswick along the North Dakota model, with the assistance of the Government of Canada and the Bank of Canada in order to bring the debt and annual interest payments 'in house' would be a very substantial first start to rectify these financial straits.
- Have Dept of Energy and Mines make all current and historic map and technical data easily accessible and integrative with all types of data accessible on the SNB web site.

Other - Autres

- I felt that there were many participants (specifically those in the service industry) who did not have the background and knowledge of the mining industry to contribute. It would be more effective if a greater percentage of the participants had direct knowledge of the business part of the industry and a significant number of years of experience.
- There could have been a presentation by gov't officials summarizing key initiatives that might be currently underway, and ask for input into these (if there are any in planning stage)
- The 'elephant in the room' is the financial constraints on the Government of NB imposed by the debt, deficits and annual interest payment obligations. This affects all areas of government operations.
- aucun commentaires pour le moment
- gov't has wasted huge amounts of money helping Glencorp (xstrata zinc) & it has yielded no benefit, as they are not good explorationists. Listen & support people who are successful, not unsuccessful.
- I have not talked to anyone else about it as a discussion. However I never heard anything against it.
- Il est très difficile de contrôler les rapporteurs (90 secondes, c'est court). Malgré tout, je suis impressionnée qu'on ait réussi à garder l'horaire.