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REPORT

**MINING IN LATIN
AMERICA: A
CHANCE TO CARVE
A NEW PATH**

September 2023

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INTRODUCTION

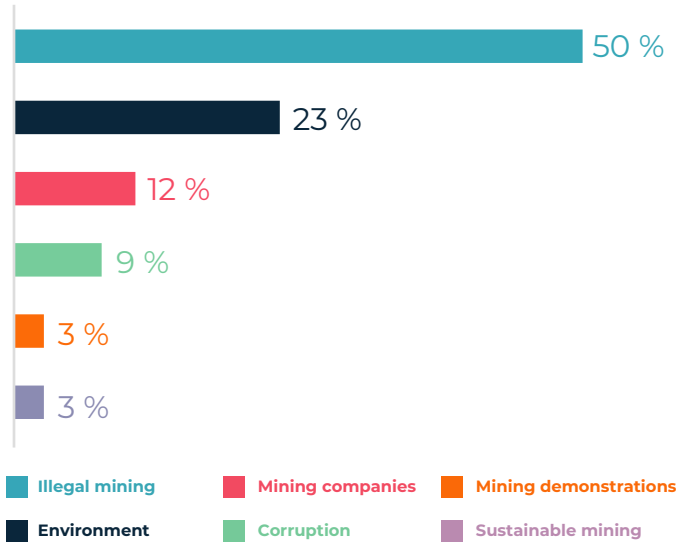
The mining industry has been under close scrutiny due to past mistakes, misinformation, and negative impacts. While it was once seen as a source of wealth and development, society's perception of it has changed over time. This change coincided with the rise of new forms of **communication** that gave voice to **oppositional activism**, leading to a fundamentally **negative perception of the industry**.

Despite the **industry's efforts to learn, repair, and correct its mistakes**, it still struggles to connect with public opinion. Now, even when the industry focuses on sharing new initiatives promoting development by investing in local projects and sustainable practices, the **messages do not seem to be effectively connecting with the public**.

At LLYC, we believe that it's time to **own the story and give it a new spin to balance perceptions** of the mining sector. We need to recognize that the industry has a **responsibility** in the global challenge of **energy transition** and has the potential to provide development alternatives for millions of people in the region. The mining sector has a **crucial opportunity to reinvent itself** and establish a meaningful connection with society.

We've developed a framework based on decades of experience working with the mining industry globally, with a focus on Latin America. Using big data analysis, we've explored **how people talk about mining** and how the media portrays the industry. Our goal is to create a **roadmap** that can help reshape the narrative of the industry and improve its public perception.

GRAPHICAL OVERVIEW OF CONVERSATION



TECHNICAL DATA SHEET

Study duration	12 months (August 15, 2022 to August 15, 2023)
Geographic Scope	Brazil, Colombia, Mexico, Dominican Republic, Argentina, Chile, Ecuador, Peru, Panama, and Guatemala
Languages	Spanish and English
Data sources	Brandwatch, Twitter, and news outlets
Total volume of mentions	1,464,510
Volume of authorship	233,459

Our analysis of the conversation in the sector across ten Latin American countries identified over **1.4 million mentions** of the mining industry in general and uncovered six key findings:

- **Illegal mining dominates the conversation**, accounting for 50% of mentions about the sector.
- **Governments and the mining industry** unintentionally contribute to the negativity surrounding the sector, perpetuating negative stereotypes.
- **The environment is used as a political banner.** The environmental impact of mining is a key electoral argument and management crusade for local and national governments.
- **The mining sector often communicates in closed circles**, with minimal positive impact on the overall conversation.
- **Specific circumstances in Latin America**, such as corruption, violence, and drug trafficking, deepen the negative stigmas associated with the industry.
- **Sustainable mining efforts are not enough.** Sustainable mining, which accounts for only 2% of the total conversation, has not been sufficient in balancing the negative conversation surrounding the industry's reputational liability.

ILLEGAL MINING LEADS THE CONVERSATION

It is no secret that mining conversations tend to have a negative tone to them. However, what draws attention is the **prevalence of illegal mining as the main topic related to mining.**

Over the past year, illegal mining has been **mentioned over 732 thousand times**, accounting for **50% of all conversations** related to the industry. This reflects how deeply this issue has penetrated public consciousness and how it is closely related to the industry as a whole, **making it difficult to project a positive image of the sector.**

Notably, the issues associated with illegal mining go beyond activities infringing industry regulations. They are also **closely tied to other criminal acts like violence, drug trafficking, and human rights violations.**

One of the most mentioned practices of illegal mining is the physical **occupation of abandoned mining camps by criminal groups** after mining projects closed due to activist pressure. These groups then extract minerals indiscriminately using **existing mining feasibility studies** without regard for the environment or social responsibility, resulting in significant environmental and social liabilities.

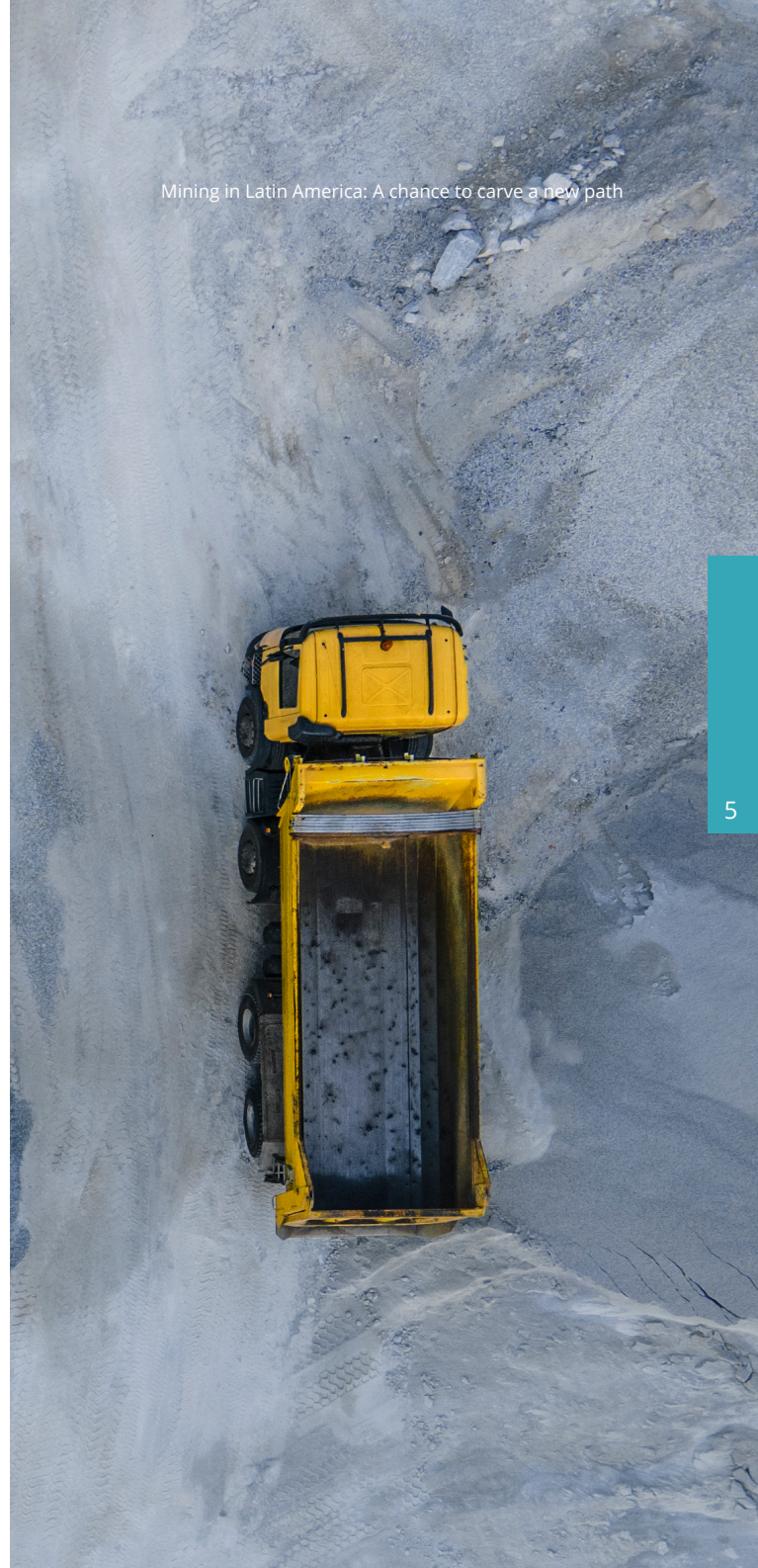
Illegal mining is a significant problem in Ecuador, with 17 out of 24 provinces affected by these activities, according to the Agency for the Regulation and Control of Energy and Non-Renewable Natural Resources. The closure of the Rio Blanco mining project has left the area vulnerable to illegal groups, causing environmental and material damage while intimidating the population. Unfortunately, the **public opinion often blames the mining sector for these illegal activities**, leading to misconceptions about the responsible mining practices of the sector. In fact, **22%** of the mentions of illegal extraction come from Ecuador, further perpetuating this misunderstanding.

Sentiment across the region indicates that **illegal mining is widely rejected**, with **over 60% of conversation**. However, **Peru stands out**, with **80%** of the conversation linking illegal mining to protests and violence. Additionally, the media has suggested that **drug trafficking and illegal mining** may be the main culprits behind recent violent demonstrations.

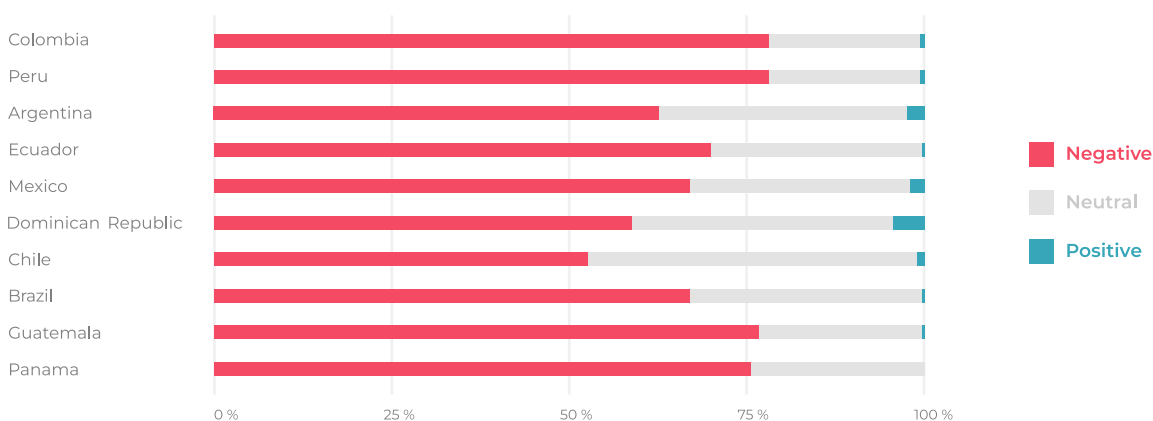
In **Colombia**, **72%** of the conversation focuses on the **involvement of armed groups and criminal organizations in illegal mining**, which has generated growing security concerns in surrounding areas.

The **negative conversation** around the crime in question is fueled by the **involvement of influential authors** such as governments and media, who replicate official statements in which constant reference is made to this crime and its consequences, such as hindering land reorganization – an important policy objective of President **Gustavo Petro**.

Official profiles hold great relevance and scope, as they attract a significant portion of the negative conversation regarding illegality. **Out of the total negative conversation towards the issue, 72% can be attributed to official profiles. Among these authors, 25% are Petro supporters, while opponents make up 13%.** The latter group criticizes not only the government’s administration but also the former Minister of Mines and Energy. They focus on the portfolio’s direction, combating this crime, and suggesting solutions to address it.



Illegal mining sentiment graph:



TWO PROTAGONISTS UNWITTINGLY FUEL NEGATIVE CONVERSATIONS

Anti-mining activism is on the rise in Latin America, and legal instability further complicates the situation. **Mining companies feel disadvantaged** when it comes to the way society, media, and government react to their every move. This is the case even for their efforts to contribute to communities and states, as **mining companies are denied any kind of recognition** even in early exploration stages. Plus, the null return on investment is not helpful at all.

The mining industry has recognized the problem of illegality and begun highlighting its risks. Additionally, the industry has integrated the **concept of illegal mining** into its own narrative, which is frequently mentioned in the media and other speaking opportunities.

Although it may seem beneficial for mining companies to take a stand on this matter, using illegal mining as a reference point has created confusion and **inadvertently highlighted the issue of illegality in discussions surrounding the mining industry**. This is largely due to the fact that the general public may not understand the context and **may attribute the negative conversation associated with illegal mining to the industry in general**.

Some governments in the region, such as Colombia or Ecuador, **have taken on the fight against illegal mining as part of their agendas**, which has raised the visibility of the activity and the term itself. In the conversation, illegal mining **is associated** with words such as **“GOVERNMENT”** and **“STATE”**. In total, there are around 34 thousand mentions where these subjects are discussed together.

In Peru, for example, **29%** of the mentions that relate mining to illegality have a **direct link to government mentions**, which shows that it is a significant obstacle to the leadership's goals.



THE ENVIRONMENT AS A POLITICAL BANNER

In the conversation, the **negative impact of mining on the environment takes second place**, with 23% – represented by more than 336 thousand mentions.

While this is a significant concern, it is important to recognize that **modern mining has made efforts to learn from past mistakes and ensure** that the activity is carried out within regulatory frameworks that guarantee **environmental protection**. Furthermore, CSR strategies have been implemented to meet basic needs of communities that could be directly impacted by mining activities. However, **despite these efforts, the industry is still plagued by a stigma** that is fueled by an activist agenda that does not recognize the evolution towards responsible practices.

The activist agenda is characterized by an ironclad approach that is closed to dialogue and does not propose alternatives. Instead, it focuses on pursuing project by project, especially in Latin America, seeking to uncover any proof of its infeasibility. This agenda leverages environmental protection appeals, and it is often supported by **local political agendas** that take **the anti-mining cause as an electoral banner**, which strengthens its reach and potential amplification.

The situation is further complicated by high-impact circumstances like the deforestation of the Amazon, which takes a central place in the conversation driven by both the media and governments. Specifically, the **governments of Colombia and Brazil** hold the industry responsible for the environmental emergency to some degree, particularly illegal mining.

THE INDUSTRY COMMUNICATES IN CLOSED CIRCLES

The industry itself is **the third most mentioned topic of conversations on mining**, with over 175,000 mentions, accounting for 12% of the total. However, the sentiment toward the industry in the conversation fluctuates between negative and positive.

In the **negative conversations**, mining companies from Latin American countries face criticism for establishing alliances with China and Russia for investment projects and mineral extraction. Accusations related to complex legal issues, including violations of indigenous rights and legislation, as well as illegal mining activities, **raise questions about the ethics of these corporations**.

Positive mentions are directly **linked to sustainability**, which accounts for **2%** of the total conversation. However, only 5% of the mentions have a **positive sentiment**. This side of the conversation is **mostly driven by the industry itself** through its corporate communication on social results and investment plans. This means that **mentions sharing and discussing positive messages focused on key elements such as sustainability are replicated chiefly by the same circle of influence, without generating relevant impacts or transcending in society**.

Most of these mentions within the subgroup of sustainable mining conversations derive precisely from **sectoral events (21.7%)**, with **Chile** being the country generating the most conversation in this regard. The mining industry's growing dedication to responsible mining is evident through the increasing number of meetings and congresses organized to address this issue. However, it appears that the problem lies in the fact that **the same group of individuals are participating in these discussions, leading to limited perspectives and potential solutions**.

The main subjects that fall under the sustainability conversation regarding mining activities have to do with **legal challenges (14.6%)** and the **economic impact of the industry (13.9%)**. These issues are particularly prevalent in **Argentina**.

In response, discussions have centered around the urgency of implementing **updated mining codes and regulations**, highlighting the importance of conducting periodic reviews to ensure the modernization of the industry. Investing in initiatives that promote responsible mining and prioritizing sustainability in mining strategies through **investment funds, grants and financial backing** are also key to minimizing environmental impact and meeting emission reduction commitments.

“Mentions sharing and discussing positive messages focused on key elements such as sustainability are replicated chiefly by the same circle of influence, without generating relevant impacts or transcending in society”

LATIN-AMERICA-SPECIFIC CIRCUMSTANCES ADD TO THE STIGMA

Although the mining industry dominates the conversation, a significant portion of the dialogue revolves around recurring issues in Latin American politics and society.

Corruption is a prominent topic in mining-related discussions, accounting for **9%** of the conversation. The focus is primarily on the relationships between government officials, public institutions, and members of illicit organizations involved in illegal extraction. However, the conversation also highlights **conflicts of interest and unethical practices** between politicians, mining industry businesspeople, and the opposition. These practices **can affect the positions of local administrations in favor or against mining projects**, such as giving gifts to influence permit issues and issuing messages that sway communities to take a particular stance. Ultimately, these issues **erode public trust** and can have a negative impact on the sector.

The **police are the institution most associated with corruption in these conversations**, with over **10,000 mentions**. Latin American media frequently report on the connections between law enforcement, criminal activity, and corrupt politicians, as well as arrests of agents involved in illegal activities.

Social mobilizations have also become a significant issue in recent years, accounting for up to **3% of the overall conversation about mining**. Corruption, lack of institutions, and environmental risk are the primary catalysts for Latin American protests related to the sector. Media coverage of these events often highlights the violence and fatalities associated with these demonstrations. Activist mobilizations against the mining industry, drug trafficking intersecting

with the sector and illegal mining, as well as protests against national government management, are all **contributors to the issue**.

Human rights are a key concern, with 33% of the conversation related to illegal mining focusing on this topic. Protests and coverage by various media outlets address issues such as the impact of mining on people's health due to the use of harmful elements like mercury, which also affects water sources. Moreover, human trafficking is another issue that is often discussed in the context of mining. In this regard, **Colombia is the most active country in volume of mentions**, followed by Argentina and Peru, and the subject is frequently highlighted in the media, with many human rights organizations producing content on this topic through news outlets.

“Social mobilizations have also become a significant issue in recent years, accounting for up to 3% of the overall conversation about mining”

SUSTAINABLE MINING, NOT ENOUGH OF AN ANTIDOTE

The mining industry has gone through many stages in its positioning towards society, and one of the most recent has been to encompass the positive impact of its activities and the care with which they are carried out in a **single term** - sustainable mining. However, despite the industry's increasing efforts to communicate from this vertical, its **impact on the conversation is low (2%)** compared to the vast universe of mentions about the sector.

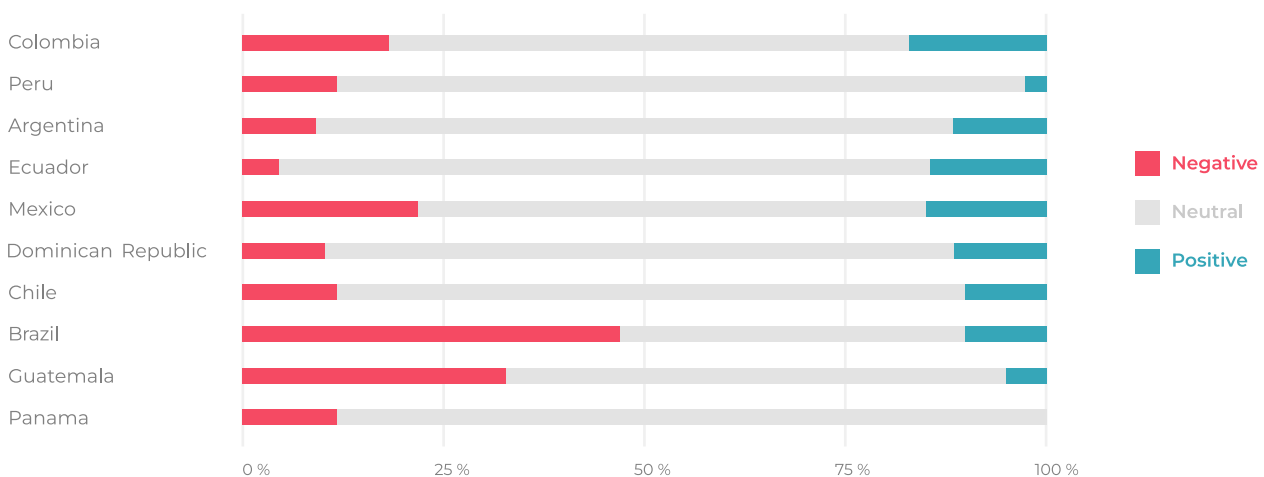
The **most prominent word in sustainable mining is "development"** (more than 2 thousand mentions), understood as collaboration and cooperation between different actors to develop solutions and promote responsible mining practices. But the sentiment with which **sustainable mining is talked about is still mostly neutral (74%)**, based mainly on the industry's own communications that promote environmental management

plans and community work, which, as discussed above, are not being properly understood outside the mining sphere.

For instance, in **Brazil, neutrality is practically total, and there is no positive sentiment towards this concept.** This correlates with the low participation of the sector in general conversations and the fact that the activity's impact, especially illegal mining, is linked to much-discussed issues such as the deforestation of the Amazon.

Leading the **negative sentiment (14%)** are countries such as **Panama and Guatemala**, which are skeptical towards the notion of "sustainable mining" due to anti-mining activism that punishes the sector and jeopardizes its development. On the other side, **Chile is the country with the most favorable mentions of the term**, which comes as no surprise as it is also the one with a more mature mining industry, which is also generally acknowledged as a sector that contributes to the economy.

Sustainable mining sentiment graph:



The concept of “sustainable mining” still has limited visibility, with **sector-specific** events being the primary form of communication (**21.7% of mentions**). While there are discussions on good practices, they tend to stay within the corporate sphere and the industry itself. However, the industry is now taking steps to address community concerns and debunk common misconceptions about the sector, especially in **Argentina and Perú**.

The other characteristic promoted by the industry in relation to sustainability is the **emphasis on the economic impact of mining (13.9% of the mentions)**. The subject lends itself to presents data on the contributions to the State, the generation of employment, and even in curbing poverty, but most of the related conversations keep the debate at a technical level that **does not connect with general audiences**, who still finds it difficult to understand the relevance of mining in daily life. Argentina leads this subject, while Brazil and Panama are the countries that participate the least in this particular side of the conversation.

There is a **growing trend within the industry to address issues of interest to the communities and dispel misconceptions about the sector**. Sustainability-related topics such as **waste management (5.1% of mentions)**, repurposing tailings or other industry leftovers, and **environmental recovery (1.4% of mentions)** are emerging. Also, efforts to mitigate impacts, reduce carbon footprint, and implement new technologies are also being communicated. However, these topics tend to be too technical and lack engagement for most people.

“There is a growing trend within the industry to address issues of interest to the communities and dispel misconceptions about the sector”



COMMUNICATING MINING'S VALUE: KEY STRATEGIES

The mining industry has been struggling to get the recognition it deserves from society, **but it's not too late to change that. The key to success lies in communicating proactively and changing the narrative** to showcase the industry's true relevance.

CHANGE THE NARRATIVE

Currently, 50% of public opinion associates illegal mining with the mining industry. **It's crucial for companies and governments to oust this association and correct the narrative.** Mining is a legal and responsible activity that's carried out in harmony with the environment. The industry itself is the best actor to combat illegality.

It's essential to call a spade a spade. Illegal extraction of natural resources is a crime, and prohibiting mining won't stop it. Illegal groups will continue to profit from live deposits, resulting in social problems. Therefore, the industry must convey the message that legal, regulated, and formal exercise is the best way to stop illegal extraction.

The industry **must take a stand and communicate in a way that can convince societies and authorities that legal mining is the best way to combat the devastating effects of illegal extraction.** This approach can help the industry manage its social license to operate.

EVOLVE THE COMMUNICATION

Mining companies **have come to recognize their past mistakes and have invested in remedying them.** As a result, mining has become one of the most modern and sustainable economic activities. However, despite their efforts, **there is still a feeling that the sector is unfairly targeted** by the authorities, media, and communities. This sense of injustice is compounded by the

much more lenient position taken by these same actors towards illegal extraction.

The mining industry has been **grappling with the perception of being held to a higher standard than other industries.** However, it must recognize that it shares the conversation with activities that are fundamentally different from mining and should not be called so at all. It is time for the industry to continue modernizing and leveraging its valuable tools **to compete equally with other industries that have traditionally enjoyed closer relationships with the general public.** As a fundamental industry, mining provides much-needed resources to support the production of goods and services essential to human life.

BREAKING OUT OF THE SUSTAINABILITY CLICHÉ

Sustainability has become an **overused term, losing its significance in recent years.** This has been observed across various sectors, and mining is no exception, especially considering the lingering stigmas surrounding it. However, it's time for mining to move beyond clichés and find fresh ways to communicate the environmental, social, and economic actions. The industry needs to establish communication strategies that resonate with the public and help them connect with its purpose.

Mining must be sustainable and continue evolving; that goes without saying. But it's equally important to communicate the responsible, modern, conscious, and innovative practices of the industry. While mining activities may have some impact on the environment, it is also the best ally of society in enabling a vital energy transformation by managing natural resources in a responsible way.

CRAFT AN ACTIONABLE AND RELATABLE NARRATIVE

In today's world, trust towards brands is becoming increasingly fragile. Therefore, it is not enough for corporations to simply understand the feelings of communities or design a compelling story. It is also

important to **engage with people on a more personal level** and **create emotional bonds**. After all, people are the ones who shape perceptions.

To counteract negative perceptions about the industry, and particularly anti-mining activism, it is crucial for organizations to take a proactive approach to distance mining from illegal extraction activities. Leaders should set the example and encourage their colleagues to follow. This approach is not about generating conflict, but rather about **creating a balanced conversation**. By **speaking in a language that people can relate to** and by explaining the real value contribution of the project and the sector for both current and future generations, the mining industry can foster a sense of empathy and build trust with its stakeholders.

KNOCKING EVEN ON DETRACTORS' DOORS

Corporate diplomacy requires constancy, patience, and a willingness to engage with detractors. This is especially true as the mining industry faces reputational liabilities that make it difficult to open doors. But **there are ways to overcome these challenges and create lasting relationships**.

Building successful relationships requires transparency, persistence, and a willingness to find common ground with opposing actors and complex regulators. By emphasizing the sector's ability to address complex social issues in collaboration with states and offering solutions that curb illegality, the mining industry can create value and build trust with stakeholders. The industry should not be afraid to knock on doors and seek out meeting spaces that can lead to dialogue and productive collaboration.

CONNECTING WITH COMMUNITIES THROUGH MEANINGFUL CAUSES

To truly connect with communities and win their support for a mining project, it's not enough to simply share information once or in a single channel. Companies must **tailor their message to resonate**

with their audiences and consistently share it through a variety of channels. This includes traditional methods like radio, community billboards, and local newspapers, as well as newer platforms like social media and messaging apps. It's important to become a part of people's daily lives and engage with them on a personal level.

By identifying the journey of the communities and finding ways to connect the company with causes that matter to them, such as sports, entrepreneurship, and agriculture, **mining companies can create a broader ecosystem that promotes positive organic engagement and support for the project**.

BREAKING THE BARRIER OF CLOSED-CIRCLE TRUST

As discussed previously, the industry's value proposition is usually communicated within a limited circle of trust. This means that **the same people are talking to the same people**, preventing the message from reaching other areas where it could have a greater impact.

The industry should use its **compelling arguments to engage in discussions around energy transformation, job creation, entrepreneurship, and environmental management in other sectors**. By doing so, it can demonstrate its evolution and collaboration with communities and governments. In turn, other sectors facing similar problems can learn and benefit from the industry's experiences

The playfield is set and the industry has already made necessary changes at the management level while also understanding the characteristics and scope of its opponents. It is now time to rewrite the rules of the game and view the second half of the journey as an opportunity to create a new assertive narrative. This will help the industry achieve balance and win in the long run. By doing this, society can better understand and measure the value of the mining sector, allowing it to contribute to society and meet the world's needs.

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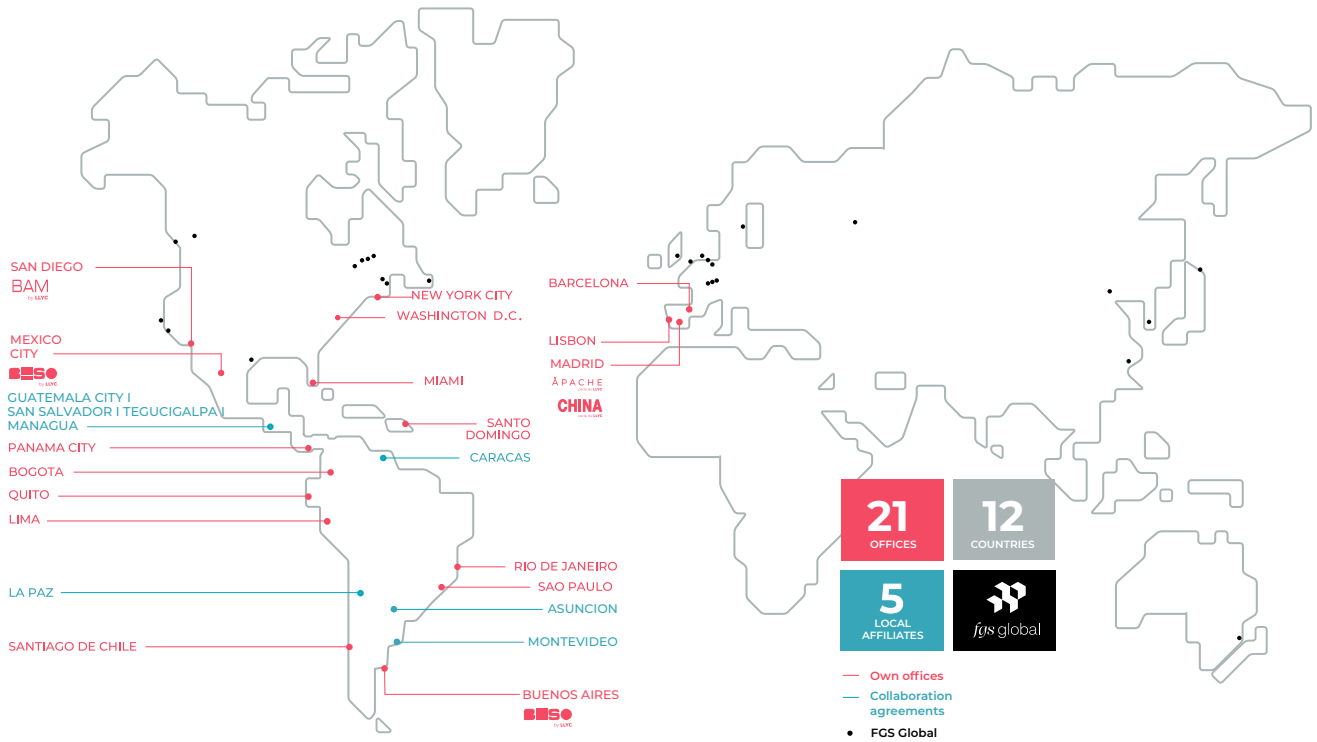
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