

**APPENDIX 41 2024 KIVALLIQ LABOUR MARKET ANALYSIS
EXECUTIVE SUMMARY**



2024 Kivalliq Labour Market Analysis

Summary

Agnico Eagle Mines and Kivalliq Inuit Association
Employment and Culture Committee

FINAL

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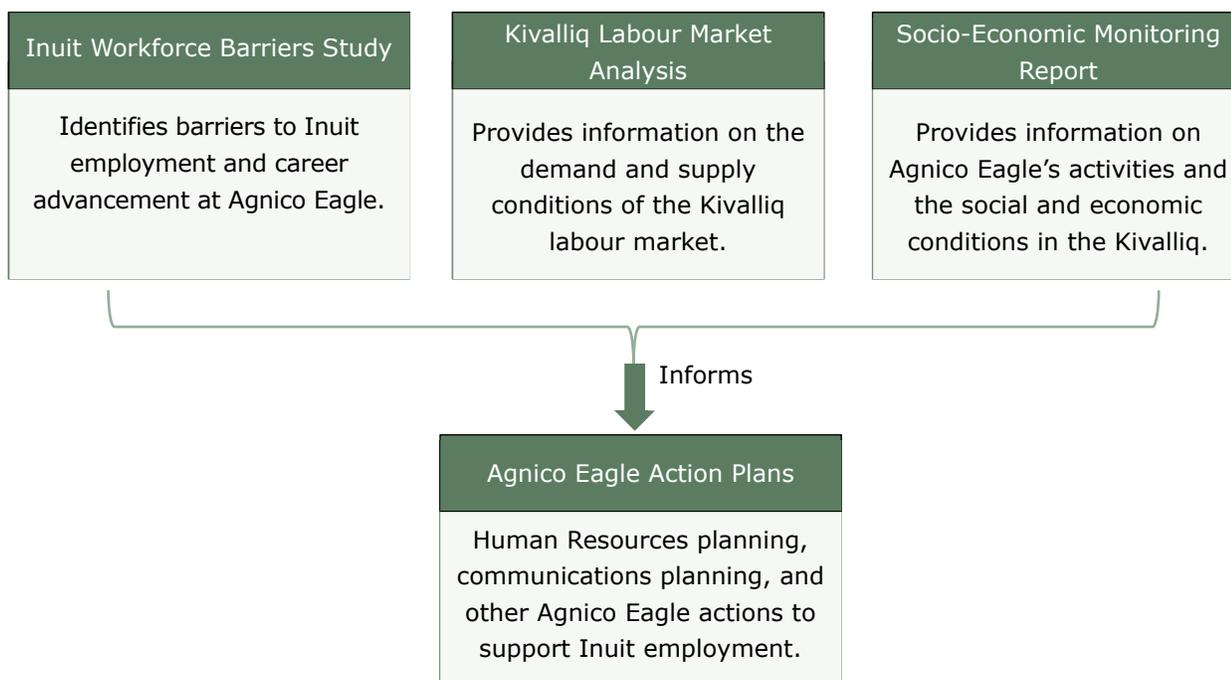
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ABSTRACT

Agnico Eagle Mines Ltd. (Agnico Eagle) and the Kivalliq Inuit Association (KIA) entered into Inuit and Impact Benefit Agreements (IIBAs) for Agnico Eagle’s mining projects in the Kivalliq region that include Meadowbank, Meliadine, and Whale Tail. The IIBAs place considerable emphasis on the training and employment of Inuit, with particular attention given to Inuit residents of the Kivalliq region. The IIBAs require the Employment and Culture Committee (ECC), with representatives from both Agnico Eagle and KIA, to “commission a third-party contractor to conduct a Labour Market Analysis (LMA) on an annual basis to assist in the understanding of Inuit employment.”

The Kivalliq Labour Market Analysis (KLMA) supports the ECC in making recommendations to enhance Inuit employment at Agnico Eagle’s Nunavut projects. The KLMA also supports the establishment of annual Inuit Employment Goals (IEGs), as well as the development and implementation of training and initiatives to create a positive and supportive workplace environment.

STUDIES THAT INFORM AGNICO EAGLE’S PLANNING AND INITIATIVES



The KLMA is part of a broader suite of analysis and reports addressing the socio-economic performance and potential of Agnico Eagle’s Kivalliq operations. The Socio-Economic Monitoring Report (SEMR), a requirement of Agnico Eagle’s Project Certificates, is published annually and offers a comprehensive summary of Agnico Eagle’s activities and an update on the social and economic conditions in the Kivalliq. Every three years, the ECC commissions the Socio-Economic Inuit Impact Benefit Review (SEIIBR), which provides socio-economic analysis specific to the IIBAs. An Inuit Workforce Barriers Study (IWBS), also commissioned every three years, aims to identify barriers to Inuit employment and career advancement at Agnico Eagle. When combined with the KLMA, the collective research is meant to inform Agnico Eagle action plans related to its human resource planning, communications plan, and other Agnico Eagle actions to support Inuit employment.

OVERVIEW

The KLMA is produced for the ECC, representing Agnico Eagle and KIA. Coupled with studies on Inuit workforce barriers and socio-economic monitoring, this report informs the ECC of changes in the labour market. It can help identify or inform IEGs, possible improvements to human resources and communications planning, and other actions that could improve Inuit participation in Agnico Eagle's Kivalliq mining operations.

Inuit at the Agnico Eagle's Kivalliq Projects continue to be underrepresented despite Agnico Eagle's substantial efforts through requirement, pre-employment, training, and retention initiatives to increase Inuit participation in various roles. In 2024, total employment at Agnico Eagle's Kivalliq Projects reached 3,387 Full-Time Equivalent (FTE) jobs, an increase of 58 (2%) from the 3,329 FTE jobs in 2021, when this study was last conducted. However, Inuit represented 11% of this workforce (370 FTE jobs) in 2024, comparable to 372 FTE jobs or 11% in 2021.

A surplus of Inuit labour is also competing for entry-level and semi-skilled job openings at Agnico Eagle's Kivalliq Projects. In 2024, Agnico Eagle's overall workforce included 377 entry-level jobs and 1,495 semi-skilled jobs, with only 149 (40%) and 196 (13%), respectively, filled by Inuit workers. The remaining 228 unskilled and 1,299 semi-skilled FTEs were filled by labour from outside Nunavut. Inuit workers also held few jobs in skilled, and management and professional jobs. As such, recruitment efforts should focus on increasing Inuit not only in unskilled and semi-skilled roles but also on defining plans to increase the representation of Inuit in skilled, and management and professional roles.

Agnico Eagle will face several challenges in attracting and retaining a larger Inuit workforce. The majority of Inuit with higher levels of education are already employed. Agnico Eagle could target these people through recruitment strategies, but this would not result in a net increase in employment in the Kivalliq region and would pass the responsibility of importing labour and training resident Inuit to other employers. Agnico Eagle must also contend with issues affecting the willingness of Inuit to join Agnico Eagle's workforce. Some of these issues would be difficult to address, such as the requirement to work at camp and on a rotation or the choice to work in the traditional economy instead. Some prospective employees also face barriers to employment, such as language, dependencies, or disabilities. Other issues, such as negative perceptions of the mine(s) as a place of work could be addressed through public communications and human resource policy and planning and other actions. Agnico Eagle is encouraged to focus on areas where positive change is possible.

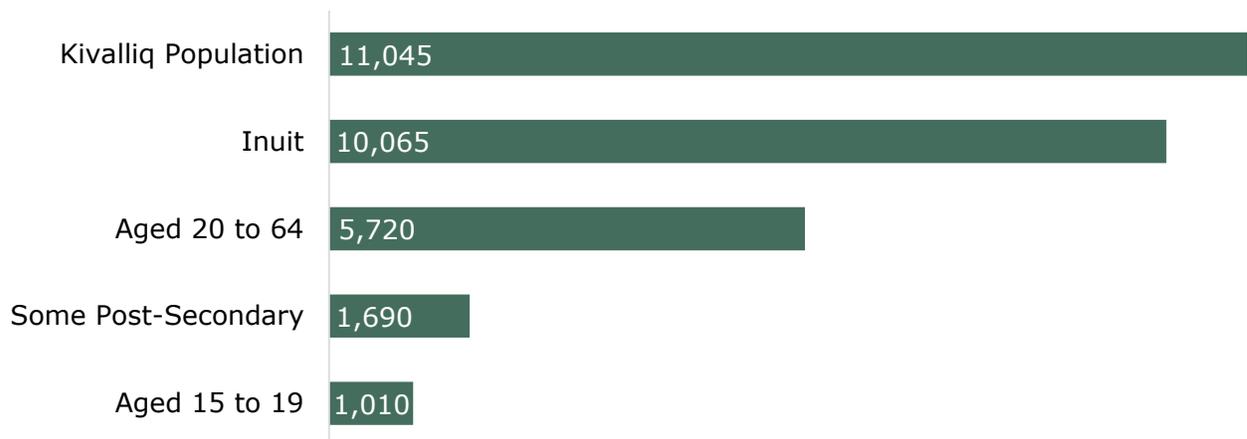
LABOUR MARKET ANALYSIS

THE CHALLENGE OF INCREASING INUIT EMPLOYMENT

An analysis of the labour supply and demand conditions shows that the Kivalliq labour market is challenged by the lack of available labour to meet the current demand. Agnico Eagle’s activities created nearly 3,400 FTE jobs last year, requiring a workforce with a diverse set of skills and qualifications in a market where:

- The total population is just over 11,000 people;
- Almost 45% are too young to work at a mine site (4,835 are 19 years of age or younger);
- Fewer than half of those who are old enough have completed high school; and
- There are fewer high school graduates in the Kivalliq region than full-time jobs in Kivalliq’s mining sector.

KIVALLIQ LABOUR SUPPLY IN 2021



Other challenges are associated with current levels of Inuit workforce participation at Agnico Eagle’s mine sites. The most influential is employment elsewhere. Employers across Nunavut seek employable Inuit, and the majority of these individuals are already in the workforce.

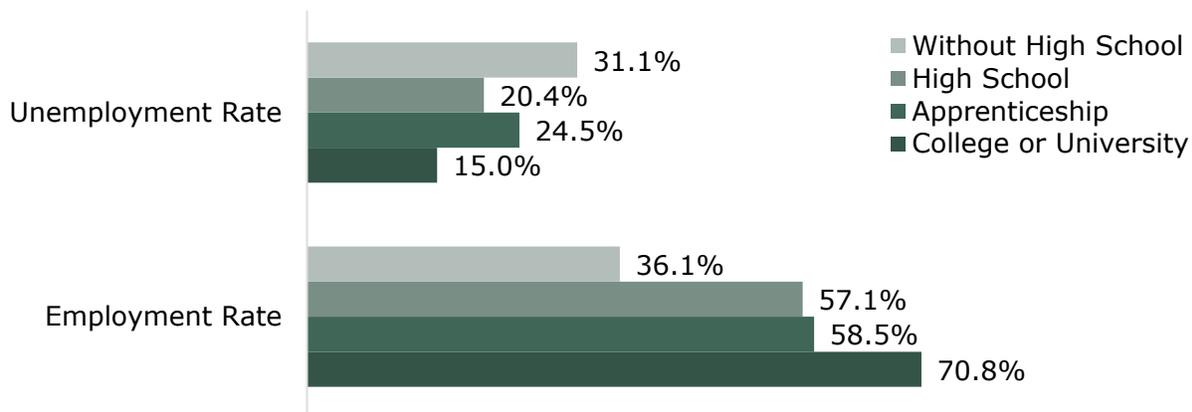
Agnico Eagle could increase its Inuit employment by taking a more aggressive approach in persuading Inuit employees to leave their current jobs for ones at a mine site. This would improve Agnico Eagle’s employment record against its targets and would mean that Inuit are gaining a greater share of the financial benefits generated by the mining industry. However, it would not provide a net benefit for the Kivalliq region. Instead, it would transfer the task of importing skilled labour and training resident labour to other regional employers. Focusing on increasing the net benefit from mining means bringing new people into the workforce and raising the participation and skill level of those already there.

Results from the 2021 Census of Population indicate that 325 Inuit aged 20 to 64 in Kivalliq had an apprenticeship certification, 190 of whom were employed; another 720 had a college or university degree, and 510 of this group were employed. Further, of the 1,050 Kivalliq Inuit aged

20 to 64 in the Kivalliq who had a high school degree as the highest level of educational attainment, 600 were employed, with the remaining being unemployed or not in the labour force.

At the other end of the spectrum, 2,925 Inuit aged 20 to 64 were without a high school diploma, of whom 475 were unemployed and 1,405 were not in the labour force. This tells us that most Inuit searching for work in Kivalliq do not have a high school diploma.

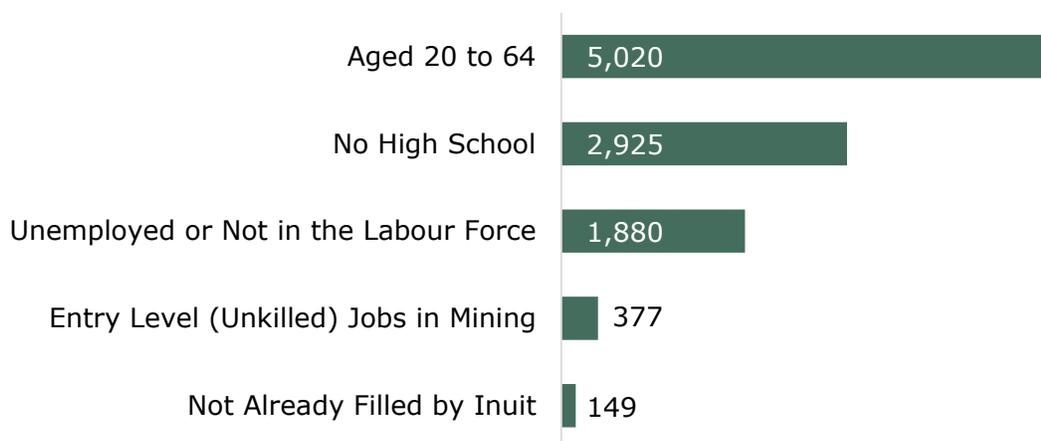
KIVALLIQ INUIT EMPLOYMENT STATUS BY EDUCATIONAL ATTAINMENT, 2021



The only jobs available at the mine sites that do not require at least a high school education are entry-level positions (classified as unskilled jobs). In 2024, the Kivalliq mines had 377 entry-level and unskilled jobs between Agnico Eagle and its contractors, and Inuit filled 149 (40%) of them.

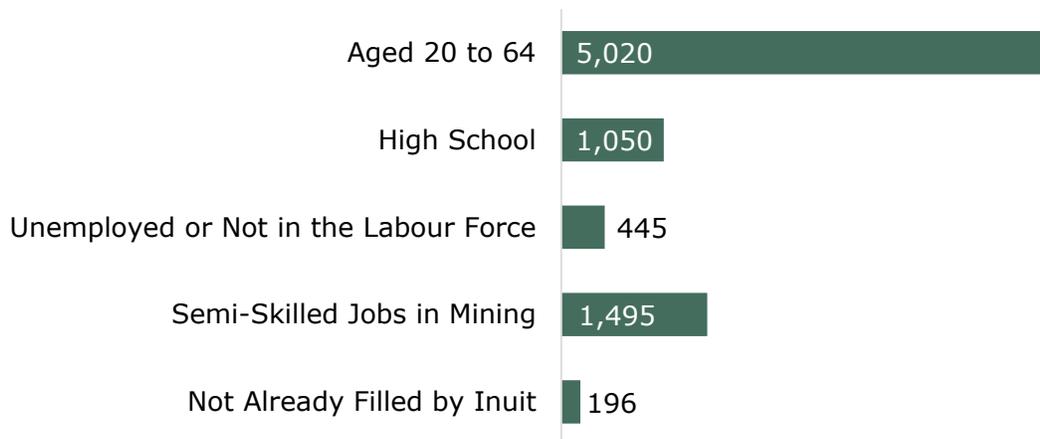
Statistics cannot tell us everything employers need to know about potential new hires, and it is difficult to predict how many people within the Inuit population who are unemployed or not in the workforce could be suitable candidates. However, the numbers point to the 228 unskilled jobs currently filled by non-Inuit as an area that should be targeted for increased Inuit employment as those jobs become available.

KIVALLIQ INUIT LABOUR SUPPLY (AGED 20 TO 64)



If the numbers favour increased employment opportunities for Kivalliq Inuit in entry-level positions, the same cannot be said for jobs in higher categories. Among the 1,050 Kivalliq Inuit who have completed high school as the highest level of educational attainment, approximately 445 are unemployed or not in the labour force. There were 1,495 jobs at Agnico Eagle’s Kivalliq operations in 2024 that required a high school education and, in many cases, some additional skills training, work experience, or equivalency. Inuit currently fill 196 of these jobs.

KIVALLIQ INUIT LABOUR SUPPLY (AGED 20 TO 64)



Jobs categorized as skilled, professional, or management typically require a trades certificate, a completed university degree, or substantial work experience or equivalencies. There were 1,515 jobs in these categories at Agnico Eagle’s mine sites in 2024; however, Inuit with a college or a university degree have an employment rate of 70.8% in the Kivalliq. Increasing Inuit employment in those jobs with higher educational requirements will, therefore, require Agnico Eagle to persuade qualified Inuit to leave their current employment—which would not be well-received by key regional partners—or pursue more constructive approaches. These could include sponsoring Inuit through apprenticeships and on-the-job learning, recruiting Inuit who are currently at university, or supporting education initiatives that encourage enrollment, retention, and completion of higher levels of education. In all cases, gains through these methods will be slower than in the lower-level jobs.

Understanding these challenges associated with identifying qualified Inuit who are not already employed elsewhere led to a conclusion in the 2024 KLMA that Agnico Eagle should also focus its recruitment efforts on younger Inuit, including those who have recently graduated or are approaching graduation from high school, college, or university. Based on the above analysis, this strategy should remain in place for the foreseeable future.

RECRUITING FROM THOSE “NOT IN AGNICO EAGLE'S LABOUR FORCE”

Non-Kivalliq labour is used to fill 278 entry-level jobs and 1,299 semi-skilled jobs. Neither of these job categories requires a university degree, and many require skills that can be attained on the job and/or through post-secondary education programs. It is in these two categories that the education and employment status of Kivalliq Inuit cannot explain their lack of representation in these categories.

Numerous other factors must be considered to understand why there are unemployed Inuit in the Kivalliq region when Agnico Eagle actively seeks Inuit employees. For instance, an individual may:

- Not want to work at a camp or on rotation;
- Have family or community responsibilities that inhibit employment at one of the mine sites;
- Not have the physical abilities needed to do the job;
- Have a dependency that would make it difficult to work at a camp or on rotation or even work at all;
- Have a language barrier;
- Prefer working in traditional or non-wage roles, such as hunting and fishing;
- Have determined that the financial benefits they could receive by working for Agnico Eagle do not outweigh their perception of the costs;
- Perceive that they would not experience a positive working environment at a mine or for Agnico Eagle based on factors such as their ethnicity, gender identity, religious beliefs, or traditional customs;
- Not want to work at a mine or for Agnico Eagle under any circumstances; or
- Be happily employed and not interested in a career change.

All these possibilities help to describe the willingness of Inuit labour to participate in Agnico Eagle's Kivalliq operations. These variables deal with the personal lives of the potential workforce and are subject to change based on the circumstances affecting them. Recognizing that willingness plays a role in an individual's labour market choices helps explain the limits of a KLMA. Data can be used to determine the size and nature of labour supply and demand in a particular market, but without specific community-level survey data, it cannot assess the willingness of this potential labour force or the full extent of barriers to labour force participation, be they systemic or otherwise.¹

Agnico Eagle has been active in the Kivalliq economy for nearly 15 years and, during that time, has been working to grow its Inuit workforce. Implementing the recommendations made in previous KLMAs regarding improved human resources programming and communications and addressing workforce barriers can improve Inuit employment with Agnico Eagle and its contractors. However, the Inuit employment rate remains low, not just at Agnico Eagle but across all of Nunavut. The larger question of willingness demonstrates that some issues are beyond the influence of the employer.

IMPROVING THE LABOUR SUPPLY-DEMAND EQUILIBRIUM

As noted earlier, potential Inuit workforce barriers are being studied separately, and we are without statistical means to investigate workforce willingness any further than it has been to date.

¹ These potential barriers are the focus of the Inuit Workforce Barriers Study.

The best evidence regarding this potential workforce, sometimes referred to as the “hidden workforce,” is the current employment record across the entire Kivalliq economy (not just the record of Agnico Eagle). Key variables introduced previously help explain the current labour supply: age, education, and availability. Changes to these variables can positively impact the supply of labour.

- A demographic increase in the number of Kivalliq Inuit aged 20 to 64 over time represents an increase in the **ready** Inuit workforce.
- Higher graduation rates, improved enrollment and completion of relevant college and university courses, and increased workforce experience or other equivalencies would increase the **ready and able** Inuit workforce.
- A change in the willingness of some members of the potential Inuit workforce—which might include a reduction of current workforce barriers—who are ready and able to work but for one or more reasons have chosen not to participate would increase the supply of **ready, able, and willing** Inuit labour.

The ready workforce is estimated to grow each year, based on changes in births and deaths and limited outmigration. This growth will translate to the growing number of residents with a high school diploma or its equivalency and other post-secondary education.

Another factor is the possibility of growing labour demand outside of Agnico Eagle’s Kivalliq operations. Agnico Eagle is not the only employer in the region, and while past KLMA’s have shown that mining industry jobs offer competitive compensation, potential employees will consider other aspects of work in seeking employment. For example, the Government of Nunavut (GN) is mandated through Article 23 of the Nunavut Land Claims Agreement to increase public-sector employment among the Inuit population until it is representative of the overall demographic profile of the territory. The GN also offers community-based posts, competitive salaries and benefits, and is more familiar to community members. In the Kivalliq, approximately 37% of those who are employed work for the public sector and the government will be seeking new and qualified Inuit employees to fill existing vacancies—some of whom might be current employees of Agnico Eagle.

GOVERNMENT OF NUNAVUT EMPLOYMENT IN THE KIVALLIQ PUBLIC SECTOR, 2023

Community	Total Positions	Positions Filled	Vacancies	Nunavut Inuit % in Filled Positions
Arviat	255.53	173.53	82	73%
Baker Lake	208.77	147	61.77	59%
Chesterfield Inlet	48.67	30.37	18.3	67%
Coral Harbour	72.25	54.48	17.77	71%
Naujaat	91.87	64.6	27.27	61%
Rankin Inlet	547.37	365.37	182	65%
Whale Cove	48.97	29.4	19.57	69%
Total Kivalliq	1,273.41	864.74	408.67	66%

Note:
% = percent

The federal government and hamlets drive additional demand for workers. Inuit organizations are attractive employers focusing on growing their Inuit workforce, and there is also labour demand from the construction, transportation, communications, and professional services industries. Further, employers from outside the Kivalliq region can also perceive unemployed Inuit as a potential source of new hires but still struggle to recruit and retain them. Agnico Eagle is, therefore, one of many employers competing for Inuit staff and is not necessarily every Inuit resident's first choice for employment.

SUMMARY OF THE KIVALLIQ LABOUR MARKET ANALYSIS

OVERVIEW

Agnico Eagle Mines Limited (Agnico Eagle) and the Kivalliq Inuit Association (KIA) have signed Inuit Impact and Benefit Agreements (IIBAs) for the Meadowbank, Whale Tail, and Meliadine mining projects in Nunavut's Kivalliq Region. These agreements promote Inuit economic and social development while ensuring mining activities respect Inuit traditions, language, and culture. They focus on Inuit employment and training, with oversight from the jointly managed Employment and Culture Committee (ECC), which also commissions the third-party Kivalliq Labour Market Analysis (KLMA).

In 2023, the ECC, including representatives from KIA and Agnico Eagle, signed a Memorandum of Understanding (MoU) on the KLMA updates on IIBA obligations. ECC recommended to the Implementation Committee (IC) to update the KLMA timeline to include time to conduct the analysis and to work on recommendations. It was recommended that the KLMA should be performed every three years, aligned with other studies following the IIBA three-year review process.

This 2024 KLMA builds on previous reports conducted since 2018 and other studies to provide an up-to-date understanding of the Kivalliq labour force.

REGIONAL ECONOMIC CONTEXT

The KLMA first examines the regional economic context of the Kivalliq Region, which is shaped by public and private-sector activities, ongoing and upcoming development projects, and workforce dynamics. These factors inform current and future labour market conditions, as well as key economic drivers, including major projects influencing employment and economic growth.

Kivalliq region's economy is driven by the public sector—a key employer—as well as natural resource development, energy needs, and community initiatives, all of which require both skilled and unskilled labour. Major economic contributors include Agnico Eagle's mining operations; exploration activities for critical minerals, gold, and uranium; and housing and energy infrastructure projects.

These projects will drive short- to long-term labour needs for the region, requiring:

- Carpenters, electricians, plumbers, maintenance workers (skilled trades), water treatment specialists, construction workers, and engineers to support public infrastructure projects and housing construction;

- Geologists, drillers, environmental scientists, camp staff, heavy equipment operators, skilled trades, engineers, miners, process plant operators, maintenance staff, and managers and supervisors to support mining and exploration;
- Environmental monitors, consultants, Inuit organizations, and public-sector workers to lead project development, economic growth, and public service delivery; and
- Specialists such as marine biologists, research vessel crew members, fisheries specialists, and monitors to support conservation and blue economies projects.

Nunavut's population is growing, attributed to changes in births and deaths and curtailed by some outmigration, with a significant youth demographic—34.6% of the total population in Kivalliq and 32.8% in Nunavut was aged 0 to 14 years in 2021. By 2030, today's 15-year-olds will enter the workforce, highlighting the need for investments in skills and training to prepare them for future job opportunities. With numerous upcoming projects, local government and industry must support workforce development to expand labour participation and ensure youth are equipped for skilled and professional roles. This growth presents an opportunity to strengthen the regional workforce if paired with adequate training and support systems.

REGIONAL LABOUR DEMAND

Current labour demand can be examined by analyzing available job postings across various platforms and vacancy rates in the private, public, and other sectors. Future labour demand can be approximated by examining upcoming projects and forecasting workforce needs based on industry trends and economic developments.

In September 2024, 81 job postings were available in the public service, with 77 posted by the territorial departments and 4 by the federal government. Most job openings were in education (45) and healthcare (25), with the remaining in administrative and infrastructure roles. In 2023, the Government of Nunavut (GN) had an overall 36% job vacancy rate; this vacancy rate was 32% in the Kivalliq region. The public sector in the region employs nearly half of the active labour force.

In private-sector labour, Agnico Eagle's mining projects play a significant role, employing, on average, 200 Kivalliq residents, with another 110 (on average) hired by Agnico Eagle contractors. In 2021, the transportation, construction, and retail sectors employed 200, 160, and 565 people, making up nearly 30% of the region's total employment. However, as of September 2024, only 32 job postings were for the private sector, with most jobs available in trades and general labour positions, with low vacancy rates reported by public sources.

The highest vacancy rates are in jobs that require post-secondary education (PSE) in engineering, architecture, and science, as well as administrative, technical, operational, scientific, and management positions.

Labour competition in the region is driven by both the mining and public sectors. Agnico Eagle's mining projects offer well-paying jobs that attract a significant portion of the workforce, while the GN provides stable, benefit-rich employment in education, healthcare, administration, and social services. The GN's focus on Inuit employment and the resources dedicated to these initiatives may lead to increased competition for Inuit workers in other regional sectors. The mining and public sectors compete particularly for skilled workers, with reports highlighting challenges such as a surplus of Inuit applicants for entry-level roles and a shortage of qualified local talent for

specialized positions, leading to external (outside of Nunavut) hiring. A lack of employer-provided housing further complicates recruitment efforts, as Inuit workers tend to prioritize jobs that include housing—such as those with the GN, which offers subsidized staff accommodations—amid the region’s persistent housing shortage. Companies in the private sector, including Agnico Eagle, do not offer staff housing beyond in-camp accommodations for workers when onsite.

The following jobs stand out as those in demand across various sectors:

- Mining:
 - Heavy equipment operators (e.g., truck drivers, loaders, and excavator operators)
 - Millwrights and mechanics
 - Miners and underground operators
 - Geologists and engineers (for exploration and project development)
 - Environmental specialists (to meet regulatory and operational needs)
 - Health and safety officers (to ensure compliance and worker safety)
 - Camp service staff (cooks, cleaners, and maintenance workers)
 - General labourers
- Skilled Trades:
 - Electricians
 - Carpenters
 - Plumbers
 - Welders
- Public Sector:
 - Nurses and healthcare professionals
 - Adult educators and teachers
 - Government administrators (administrative, financial, and operational roles in government departments)
- Construction and Infrastructure:
 - Journeymen
 - Cargo handlers
 - Painters
 - General labourers
- Retail and service jobs:
 - Store, project, and business managers or supervisors
 - Post office assistants
 - Retail clerks
 - Customer service clerks

Labour market challenges, including limited access to educational services, skill gaps, and low awareness of job opportunities, further intensify competition.

As a major regional employer, Agnico Eagle’s Kivalliq Projects contribute to the labour demand and competition for labour, particularly in filling vacancies caused by voluntary and involuntary turnover. While approximately 200 Kivalliq residents work with Agnico Eagle and another 110 with Project contractors, nearly 100 Inuit-held positions required replacement due to turnover in 2023, a trend expected to persist over the next three years. Approximately 708 workers in the Kivalliq region have prior experience with Kivalliq Projects, having been employed either directly by Agnico Eagle or through project contractors, making them potential candidates for future rehiring.

As competition for skilled labour grows, employers must consider the broader impact of their hiring strategies. Employment in mining boosts job opportunities and labour market performance, but targeted recruitment strategies can strain essential services such as healthcare and education. In some cases, mining companies, including Agnico Eagle, should avoid hiring local professionals, ensuring they remain in essential community roles. Without coordination between the public and private sectors, shifting workers from employment to employment rather than expanding workforce capacity can hinder the ability of communities to provide services to their residents. A balanced and coordinated approach is needed to maximize net employment benefits.

Overall, current and upcoming projects and workforce needs in both the public and private sectors suggest a sustained and growing demand for skilled labour, creating ongoing employment and workforce development opportunities in the Kivalliq region.

REGIONAL LABOUR SUPPLY

The labour supply in the Kivalliq region is shaped by the demographic composition of its predominantly Inuit (91%) and relatively young population (34.6% under the age of 15; Chart ES-1).

CHART ES-1 KEY DEMOGRAPHICS IN KIVALLIQ AND NUNAVUT, 2021

Population Demographics	Kivalliq	Nunavut
Total Population	11,045	36,865
Total Inuit Population	10,065	30,865
Inuit as a % of total population within the region	91%	84%
Inuit as a % of total Inuit population in Canada	14%	44%
Inuit Men+	50.3%	49.7%
Inuit Women+	50.2%	49.8%
Age distribution (Inuit + non-Inuit):		
0 to 14 years	34.6%	32.8%
15 to 64 years	61.1%	62.8%
65 years and over	4.3%	4.4%

Source: 2021 Census of Population, Statistics Canada

Note:

% = percent

Outside Nunavut, 260 Inuit live in Yukon, 4,150 Inuit live in the Northwest Territories (NWT), and 35,265 live in other Canadian provinces.

Labour force participation is moderate, with higher unemployment rates than the Canadian average (Chart ES-2), and there is an opportunity to increase engagement, especially among youth and those with limited formal education (Chart ES-3).

CHART ES-2. LABOUR FORCE CHARACTERISTICS BY AGE IN KIVALLIQ, 2021

Labour Force Characteristics	15 to 19 Years	20 to 24 Years	25 to 64 Years	65 Years and Over
Total—Labour force status	1,005	925	4,760	470
In the labour force	295	495	3,210	125
Employed	210	340	2,580	110
Unemployed	80	160	625	15
Not in the labour force	710	430	1,555	340
Participation rate	29%	54%	67%	27%
Employment rate	21%	37%	54%	23%
Unemployment rate	27%	32%	20%	12%

Source: 2021 Census of Population, Statistics Canada

Note:

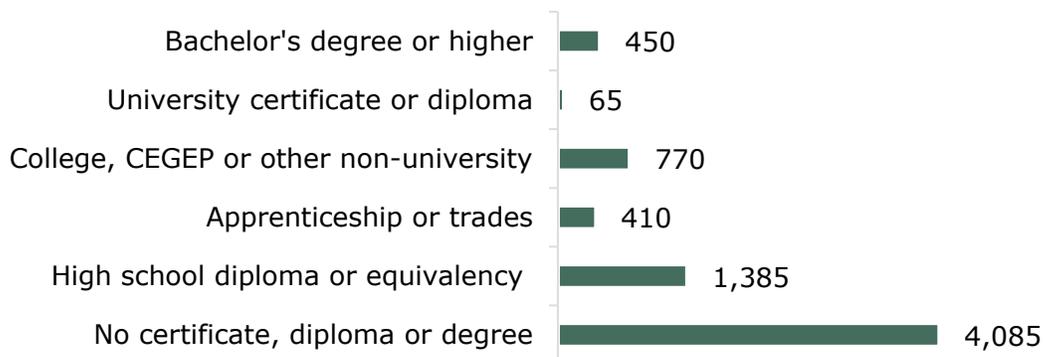
% = percent

While women in Kivalliq achieve higher employment rates and labour force participation, particularly in younger age groups, men face higher unemployment and job insecurity. The higher unemployment rate in the region, along with a large share of the population not participating in the labour force together with underemployment (part-time and seasonal employment), reflect the broader economic challenges faced by the Kivalliq region, including job scarcity, limited economic diversification, and barriers related to education, housing, and infrastructure.

A large portion of the population also lacks formal educational qualifications, limiting opportunities for higher-wage jobs and long-term career advancement. Further, despite the growing participation of Inuit individuals in educational programs, a large portion of the youth and young adults still lack secondary and post-secondary qualifications.

Gaps in high school graduation rates and low post-secondary participation suggest potential skill shortages in the next generation, which could affect workforce readiness and economic growth. Further, gender imbalances persist, with women favoring business and health fields and men favoring the technical trades, highlighting a need for more balanced representation. Limited access to certain academic programs and lower perceived value of higher education of select programs may further restrict workforce development.

CHART ES-3. EDUCATIONAL ATTAINMENT IN THE KIVALLIQ REGION, 2021



Source: 2021 Census of Population, Statistics Canada

Note:

CEGEP = Collège d'enseignement general et professionnel

The regional labour market primarily centers on service and trade-based roles, with a high demand for skilled trades and community services. Science, technology, engineering, and mathematics (STEM) occupations remain limited in key industries in the region like mining, reflecting gaps in technical skill development and training, and/or limited availability of such jobs. The Inuit labour force is largely employed in non-STEM sectors, both within and beyond the territories.

Groups that do not participate in the labour force can include the following:

- **Young adults still in the school system or pursuing PSE.** In 2021, in Kivalliq, 1,930 people (27% of those 15 years or above) were 15 to 24 years of age, while in Nunavut, 5,905 people (24%) were in that age range.
- **Retired population.** In 2022, approximately 600 individuals 55 to 64 years of age (21% of this age group) and another 1,400 individuals over the age of 65 (89% of this age group) were receiving the Canada Pension Plan (CPP) in Nunavut.
- **People with disabilities.** Of those not actively participating in the labour force in the territory (10,145) but of working age, 1,790 people (18%) in Nunavut had at least one disability in 2022.
- **Hidden labour force.** This category consists of discouraged and marginally attached workers who are able to work but are not actively looking or have stopped actively searching for work, often due to prolonged unemployment, repeated rejections, a mismatch between skills and available jobs, or other barriers such as cultural, social, or health-related factors. The size of this group is undetermined.

Employment is concentrated in larger communities such as Rankin Inlet and Arviat, and smaller communities face greater barriers to job access. On average, 400 individuals in Nunavut receive regular Employment Insurance (EI) benefits, while another 400 receive fishing and special EI benefits. Another 4,400 individuals in the Kivalliq region, or 7,500 in Nunavut as a whole, are estimated to be on income support.

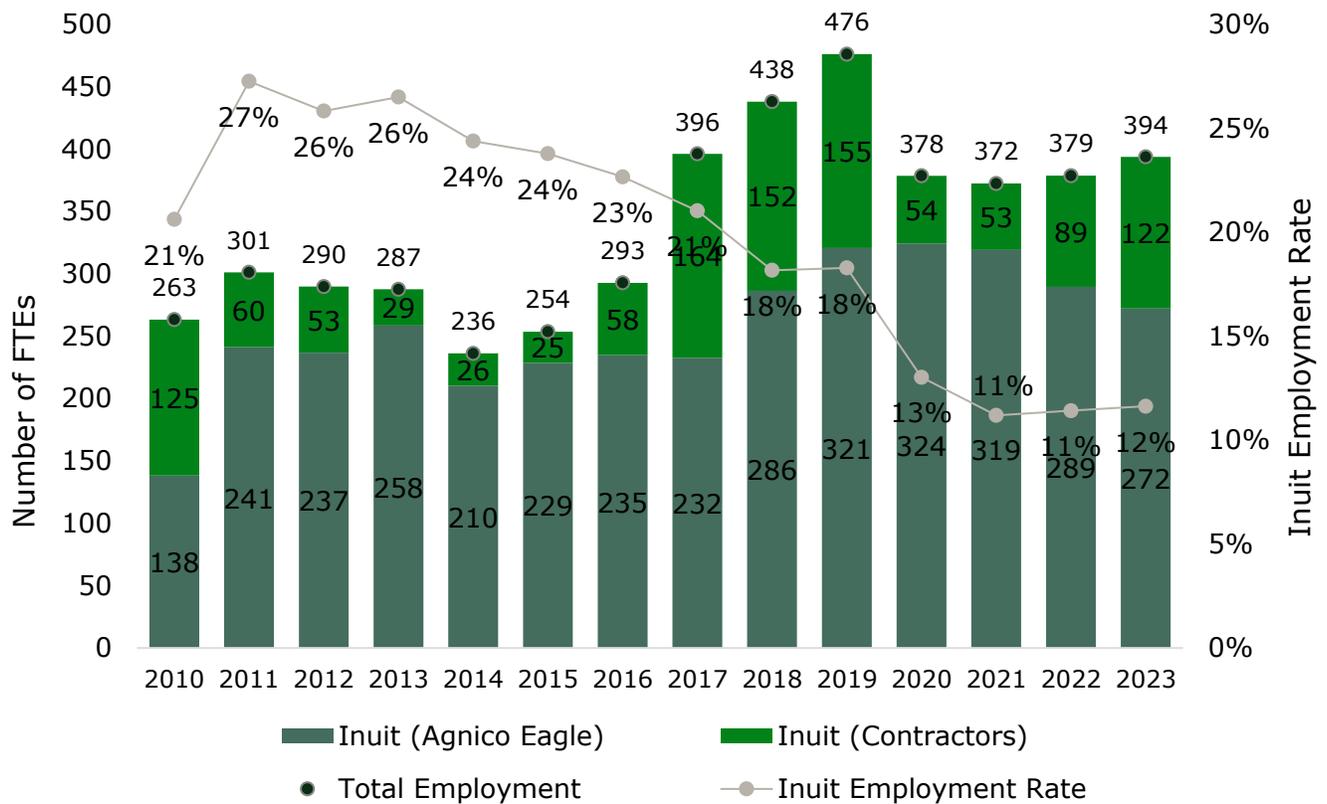
Nunavut's income support program provides basic benefits for food, shelter, utilities, and municipal services, with payments made directly to recipients or service providers.

Benefits include basic allowances, housing and utility support, and extended benefits for education, emergencies, and daycare. As of 1 April, 2023, basic income starts at \$914 per month for one person, increasing with household size, reaching \$4,037 for 10 members, with additional increments based on household size and income zone. Assistance is generally aimed at supporting those unable to work due to disability, illness, or low income, but some individuals may remain on assistance despite its lower benefits compared to employment income.

The regional labour supply is further challenged by its limited ability to attract new residents or retain its current population, particularly of working age. Limited immigration and an ongoing trend of interprovincial outmigration highlight the need for improved local economic opportunities and/or better access to infrastructure and housing. Findings from the Inuit employee surveys highlight a prevalent desire to move south, driven by wanting to be closer to friends and family, as well as by improved access to housing, services, and economic opportunities.

Agnico Eagle offers a wide range of job opportunities at its Kivalliq Projects and is committed to achieving high Inuit representation within its workforce, but only 12% of the total workforce were Inuit in 2023—this includes Inuit from the Kivalliq and Inuit from outside of Nunavut (Chart ES-4). Most Inuit employment is concentrated in unskilled and semi-skilled roles, with limited roles held by Inuit in skilled as well as management and professional roles.

CHART ES-4. TOTAL EMPLOYMENT OF INUIT AT AGNICO EAGLE’S KIVALLIQ PROJECTS



Source: Data obtained from Agnico Eagle’s Kivalliq Projects 2023 Socio-Economic Monitoring Report.

Note:

Agnico Eagle = Agnico Eagle Mines Limited; FTE = Full-Time Equivalent

% = percent

Labour supply challenges—including a lack of alignment between skills and opportunities, a significant portion of the population not participating in the workforce, and many workers occupying community roles—create an insufficient labour pool to meet the labour needs of the Kivalliq Projects. This presents an opportunity to invest in workforce skilling and workforce readiness programs, with a focus on developing the necessary skills to meet future workforce needs.

ECOSYSTEM

Educational attainment drives the regional labour supply and demand. The education ecosystem for Inuit learners is shaped by geographic location, accessibility to programs, culturally relevant curricula, and pathways to employment. Across Inuit Nunangat—"the place where Inuit live"—educational institutions, government initiatives, and organizations work together to provide programs that support Inuit students from early education to post-secondary studies and into the workforce.

Inuit students pursue their studies in Nunavut, at the Nunavut Arctic College (NAC) Kivalliq Campus and Sanatuliqsarvik (Nunavut Trades Training Centre) in Rankin Inlet, but also outside the territory, often in Manitoba and Ontario. Many Canadian colleges and universities support Indigenous self-determination through tailored programs and services, including those under the Indigenous Education Protocol. Financial assistance, such as through scholarships and bursaries, and support services for mental health, housing, and mentorship, helps Indigenous students succeed in their studies. Specific initiatives that support Inuit students in Nunavut include the Qulliq Energy Corporation's (QEC's) Laura Ulluriaq Gauthier Scholarship and the Nunavut Tunngavik Foundation, which offers Post-Secondary Scholarships Skills and Employment Advancement Scholarships. Inuit students may also qualify for the Financial Assistance for Nunavut Students (FANS) program, which is available for many educational institutions across Canada. On average, there are 200 to 300 new Inuit entrants to PSE in Canada each year.

In addition to PSE options, the GN supports workforce training and skills development, led by the Career Development Division. Employment Assistance Services (EAS) that include career counseling, connecting to opportunities, writing and interview workshops, and assistance with applications for GN career-related programs are available in each Nunavut region. The GN's Adult Learning and Training Supports (ALTS) program enhances work readiness and facilitates skills upgrading for adults. The GN's Nunavut Apprenticeship Certification Unit supports individuals in completing apprenticeships, including in-class instruction and on-the-job experience with employers. Regional Inuit organizations and industry also collaborate to improve access to training and employment through recruitment and pre-employment practices.

Common barriers to Inuit employment include:

- Rigid evaluation criteria that prioritize credentials over potential, misalignment with Inuit Societal Values (ISVs), and interview practices that encourage self-promotion;
- Challenges with digital literacy and lack of access to computers and the internet;
- Workplace and hiring practices that do not align with Inuit language and culture;
- Family and cultural responsibilities, such as hunting and harvesting and caregiving, that conflict with work schedules;
- Complex or biased hiring and workplace protocols that particularly affect Inuit women; and
- Limited in-community job postings and communication gaps about employment opportunities.

The following broad initiatives have been identified to improve the recruitment of Inuit, and reduce barriers to education and employment:

- **Inuit Human Resources Strategies.** Setting clear goals for maximizing Inuit employment, including plans for recruitment, training, and retention, ensuring that Inuit candidates are given priority in hiring, especially when they possess comparable skills to non-Inuit candidates.
- **Community Liaison Officers (CLOs).** CLOs stationed in local communities to bridge communication between companies and Inuit job seekers and provide information on job opportunities, assist with the recruitment process, and offer access to resources such as computers and internet for job applications.
- **Inuit Recruitment Specialists.** Inuit Recruitment Specialists, in mining and in organizations such as the KIA, to work closely with Inuit job applicants, guide them through the recruitment process, address concerns or barriers they may encounter, and help match them with suitable job openings.
- **Job Postings.** Job opportunities posted in multiple languages (English and Inuktitut) and distributed physically in communities and online (including social media) to enhance job visibility and access; the use of fewer words in job postings; and designing focused portals to connect candidates to employers.
- **Local Employment and Training Information Sessions.** Employment and training information sessions delivered to raise awareness about available positions and help potential candidates understand the requirements.
- **Barrier Reduction Initiatives.** Actively identifying and reducing barriers to Inuit employment, such as adjusting job requirements where appropriate. This may involve recognizing practical skills and traditional knowledge in place of formal education, engaging with Inuit who may not have conventional qualifications, and developing pathways for entry into the workforce through on-the-job training.
- **Collaborations with Educational Institutions.** Collaborating with local colleges and universities, companies to offer education and training programs tailored to the needs of Inuit communities to equip Inuit with the necessary skills and qualifications to enter the workforce. This can often include specialized training initiatives focused on industries relevant to the region, such as mining, construction, and logistics in the Kivalliq. Training can also be delivered within communities, with sessions rotating between them, although limited training spaces can sometimes pose a challenge.
- **Internship and Summer Student Programs.** Collaborating with educational institutions to promote internship and summer student positions to engage/attract younger Inuit residents.
- **Resumé Sharing and Partnerships with Contractors.** Sharing of Inuit resumé between project operators and contractors working onsite to increase the chances of placing Inuit candidates in available positions.
- **On-the-Job Training.** On-the-job training programs to equip Inuit employees with the skills they need for specific roles, allowing gradual skill development while employed. This supports long-term career growth and helps Inuit employees advance within the company.
- **Community Engagement.** Regular community engagement activities to ensure that Inuit communities have a voice in the recruitment process. These sessions help align recruitment efforts with community needs and expectations, ensuring culturally appropriate approaches to hiring and training.

Supporting Inuit before employment can assist in preparation and success in the workforce. These initiatives can include increasing educational opportunities, and transition supports from early learning through to PSE, as well as essential skills development (including digital literacy) grounded in Inuit culture. The Nunavut Mine Training Strategy also emphasizes the importance of programs that develop literacy, numeracy, and life skills (e.g., financial management, health and wellness, time management), and work readiness (e.g., communication, teamwork, problem-solving).

On the other hand, employment benefits that can help retain employees in roles can include housing allowances or subsidized housing, health benefits, retirement benefits, bonuses, and paid time off (including paid time off for cultural activities). Further, flexible work arrangements, such as part-time work, job sharing, leave options, and telework, are essential in Nunavut, where family responsibilities and cultural activities are important.

Clear policies, structured procedures, on-the-job training, and skill development, and greater awareness of the benefits can help improve the hiring and retention of Inuit workers by fostering a more supportive and adaptable work environment. Given that Nunavut's workforce is primarily employed in the public sector, with mining and construction being the fastest-growing industries, investing in education to support careers in administration, core services (health, education), trades, and transportation is essential for workforce development.

PUBLIC POLICY

Public policies further foster employment opportunities in the Kivalliq region through initiatives to bridge skill gaps, provide financial hiring incentives to employers, and enhance access to education and training programs. These programs and policies are available at the federal, territorial, and regional levels.

The Government of Canada's (GoC's) Strategic Innovation Fund (SIF) and the Investing in Canada Infrastructure Program (ICIP) focus on business development, innovation, and improving environmental and socio-economic conditions. Tax incentives and the Canadian Critical Minerals Strategy (CCMS) provide financial support and promote sustainable development in the mining industry. Additionally, the Arctic and Northern Policy Framework (ANPF) and Canadian Northern Economic Development Agency's (CanNor's) Inclusive Diversification and Economic Advancement in the North (IDEANorth) program prioritize infrastructure, capacity building, and economic resilience in the North.

Organizations, employers, and students can access a variety of financial supports, including grants and wage subsidies and other supportive programs to address training and hiring needs. The Grant for Nunavut Employees (GNE) program and the Training Assistance Program (TAP) subsidize training costs and wages, making it more feasible for employers to upskill existing employees or hire new ones. The Summer Student Employment Equity Program (SSEEP) and the Inuit Employment Plan work to increase Inuit representation in the workforce. The Apprenticeship Job Creation Tax Credit (AJCTC) and the Youth Employment and Skills Strategy (YESS) provide further support. At the same time, the Mining Industry Human Resources Council (MiHR) offers wage subsidies for students and job-ready youth. Specific subsidies for employers to train new and prospective employees include the First Nations and Inuit Skills and Partnership Fund (SPF) and the Skills Link Program through the First Nations and Inuit Youth Employment Strategy (FNIYES),

which offer funding and wage subsidies for Indigenous organizations and employers to support training and work placements. The Targeted Labour Market Program (TLMP) also offers different financial supports for training and/or wage subsidies.

Well-designed education policies can promote inclusive and accessible educational opportunities for individuals facing barriers, including financial and logistical barriers. The National Strategy on Inuit Education (NSIE) and the Inuit Post-Secondary Education Strategy (IPSES) invest in early childhood education, bilingual programs, and post-secondary success. The GN's FANS program and the Makigiaqta Inuit Training Corporation (Makigiaqta) provide financial support to reduce financial barriers to education. Additionally, regional programs like KIA's Student Sponsorship further assist Inuit students.

These various initiatives focus on reducing barriers and increasing Inuit employment. However, logistical challenges such as geographic isolation, limited infrastructure, the digital divide, and a lack of knowledge about existing programs or how to access them, often hinder the benefits of these programs. This limits the ability of employees to take full advantage of distance learning and digital training opportunities while also restricting employers' access to employment creation programs. The persistent socio-economic challenges, such as low educational attainment and high unemployment, further suggest that the reach of these programs needs to be expanded to have a meaningful impact. Collaboration between KIA and industry on public policy can help address workplace barriers and expand Inuit employment opportunities.

LABOUR MARKET BEHAVIOUR

Labour market behaviour, the final topic investigated in the KLMA, looks at employment trends for women in mining, employment vacancy rates, workforce turnover, seniority, career entry points, and pathways for advancement, comparing how these factors vary across the public sector, private sector, and mining industry. These insights inform the strengths and gaps in workforce capacity and help to identify strategies to improve employment outcomes in the region.

Employment of Women

In Canada, 25% of Inuit women work in mining, surpassing the national average of 18–19% for both Inuit and non-Inuit women in the industry. In Nunavut specifically, 27% of Inuit workers in mining are women. Despite this, women remain underrepresented in the mining industry. Barriers specific to increasing female participation in employment can include:

- Limited availability and affordability of childcare;
- Challenges in balancing family responsibilities with employment demands;
- Inadequate social and mental health support systems;
- Lack of role models and mentorship opportunities;
- Gender-based biases in hiring and workplace practices; and
- Gaps in the implementation of company equity policies.

However, other challenges, such as fear of sexual harassment or the feeling of lack of safety, can be seen as additional barriers, especially in male-dominated workplaces. Implementing Equity, Diversity, and Inclusion (EDI) commitments, Human Resources (HR) policies and programs, and

creating an inclusive workplace culture can improve hiring and retention efforts and reduce barriers to employment for diverse groups.

Vacancy Rates

High vacancy rates can further hinder the delivery of services and economic development. In the public sector, administrative, technical, operational, and scientific roles are the most difficult to staff, with common challenges including a long and complex hiring process, lack of competitive wages, lack of education or experience, lack of staff housing, applicants declining job offer, and a limited number of applicants. The average time to fill a public-sector job ranges from 81 to 133 days. Challenges to filling vacancies in the public sector can imply increased competition for skilled labour in the mining sector. Mining companies may find it difficult to attract and retain talent if public-sector roles are not filled due to a lack of qualified local candidates.

Given vacancies in the mining sector, hard-to-staff roles at Agnico Eagle's Kivalliq Projects include:

- **Apprenticeship Positions** (including trades: Mechanic, Plumber, Carpenter, Welder, Housing Maintainer, Cook). For these positions, candidates must be registered under the GN or successfully complete the Pre-Trade Entrance Exam. This requirement significantly limits the pool of eligible applicants.
- **Wildlife Monitor**. This role requires a valid Possession and Acquisition Licence (PAL), which is obtained through PAL training. Lengthy delays in receiving or renewing this license pose challenges for recruitment.
- **Technical Positions** (Mining Technician and Geology Technician). These positions require college degrees that are not currently offered in Nunavut, creating a gap in locally available education programs and, consequently, locally available talent.
- **Environmental Technician**. Although a relevant program is available in Nunavut, most graduates are recruited by the federal or territorial governments, where work conditions are highly competitive.
- **Engineering Positions** (Mining, Geology, Mechanical, etc.). These positions require Bachelor's degrees, which are not offered in Nunavut, contributing to a recruitment challenge.

As such, when looking at vacancies by skill level, positions that require technical training or a degree to staff scientific, professional, and management roles have the highest vacancies.

Employment Turnover

Employee turnover can provide insights into job satisfaction and the effectiveness of existing retention strategies, and help identify new policies to improve job retention. Employee turnover varies by sector and by employer, with Inuit turnover often exceeding the turnover reported for non-Inuit workers.

In the mining sector, turnover sits at approximately 30% for Inuit employees, although this is subject to annual variation and project-specific retention strategies. High turnover for Inuit employees is attributed to difficulties adjusting to mine work, concerns about family while away, challenges faced by spouses in managing households during rotations, difficulty balancing family life or traditional lifestyle with rotational work, loneliness, and dissatisfaction with working hours.

In the public sector, the overall turnover is lower and varies from 0% to 15% depending on the department, with common reasons for Inuit turnover including:

- Desire for better pay, benefits, and working conditions (50%);
- Desire for an indeterminate (permanent) job (47%);
- Seeking a role that better aligns with skills, knowledge, and goals (41%);
- Interest in better learning opportunities (35%);
- Preference for a workplace guided by Inuit culture and incorporating Inuit values and languages (31%);
- Wanting a housing allowance or an improved one (28%);
- Other reasons, such as keeping options open or being undecided about the future (27%);
- Interest in a job offering staff housing (26%);
- Desire to use knowledge of Inuit society, culture, and economy more effectively (17%);
- Seeking less stressful work (14%);
- Preference for a job in a different location (10%);
- Experiencing harassment in the workplace (10%);
- Difficulty with supervisors, managers, or co-workers (10%); and
- Experiencing racial or cultural discrimination (7%).

These trends underscore the need for tailored strategies to address high turnover rates among Inuit employees by improving work-life balance and work flexibility, and by addressing cultural and family considerations.

Employment Seniority

Employment seniority provides further insights into workforce stability, career progression, and long-term employee retention. In mining projects such as the Mary River, an Inuit employee survey revealed that most employees were concentrated in roles of less than one year in duration as well as roles that were more than three years, suggesting that there is a gap in employee retention between short-term and long-term positions. This may indicate challenges in retaining Inuit employees beyond the initial year due to a lack of on-the-job success (termination of employment) or voluntary resignation. At Agnico Eagle's Kivalliq Projects, there is a more balanced distribution of employment tenure, with strong employee retention rates observed in the 0- to 3-year period and the 5-year-and-above period; however, there were also fewer employees in the 3- to 5-year period. In mining, most Inuit employees also fill unskilled and semi-skilled roles, with limited roles held by Inuit in skilled, and management and professional roles.

While information on the length of employment in the public service is not comparable, most Inuit employees work in paraprofessional and administrative support roles, with lower representation at higher career levels. This distribution highlights a concentration of Inuit employees in lower-level positions, emphasizing the need for substantial progress in increasing Inuit representation at skilled, and professional and management levels.

Several challenges stand out as contributing to the underrepresentation of Inuit in professional, middle management, and senior management positions in Nunavut's labour market:

- **High demand across organizations:** Individuals with the required education and experience are in extremely high demand across all sectors in Nunavut.
- **Limited availability of qualified candidates:** Many qualified individuals may already be employed elsewhere, creating competition among organizations and departments.
- **Developing internal capacity:** The local labour market is still building the capacity to meet the demand for higher-level positions, often relying on external recruitment to fill these roles.
- **High turnover rates:** Frequent turnover limits the ability to develop skills and experience through sustained job tenure.
- **Brain drain:** Skilled workers who gain experience within Nunavut's economy often leave the territory for opportunities elsewhere.

Career Entry Points

Cultural and language barriers, disparities in learning styles, and limited access to local education and training programs influence career entry points for youth from the region. However, multiple initiatives aim to support youth employment, including the First Nations and Inuit Youth Employment Strategy, which offers wage subsidies and skill-building opportunities through summer work experiences and career development programs. Additionally, the NAC, in partnership with the government and employers, provides apprenticeship programs for careers in trades. Youth can also enter the workforce through unskilled positions in industries like mining, as many operators, including Agnico Eagle, do not have minimum educational requirements. While these pathways create opportunities, broader workforce participation challenges remain, requiring continued efforts to bridge the gap between training and employment.

For women, particularly in industries like mining, employment barriers include balancing family responsibilities, the need for flexible work schedules, and the lack of workplace inclusivity. Various programs seek to address these challenges. Government initiatives, such as the GN's Women's Initiatives and community grants, focus on leadership, wellness, and economic self-sufficiency. Additionally, organizations like Pauktuutit Inuit Women of Canada (Pauktuutit) provide networking and entrepreneurship resources for Inuit women. Mining companies have also implemented targeted programs to encourage women's participation, such as mentorship initiatives, pre-employment training, and recruitment campaigns highlighting female role models. However, while these programs help improve representation, they do not fully resolve systemic challenges. Effective solutions require a combined effort from public organizations and industry leaders to create more inclusive workplaces and address gender-specific employment barriers.

Career Advancement

Lastly, the KLMA framework considers career advancement that enhances job satisfaction and employee retention and contributes to a skilled and experienced workforce.

Mining companies in Nunavut have established structured programs to promote Inuit employees and support career advancement. Agnico Eagle's Kivalliq Projects, for instance, offer initiatives such as the Career Path Program for Inuit employees to provide tailored training opportunities.

The Rapid Inuit-Specific Education (RISE) Program further supports career progression by bridging educational gaps and offering individualized learning plans that include literacy, numeracy, and leadership skills. Additionally, Individualized Development Plans (IDPs) guide employees toward long-term career goals. Similarly, Baffinland’s Mary River Project provides Career Development Plans customized for each Inuit employee, outlining training and promotional aspirations.

As a result of this targeted focus, Agnico Eagle’s Kivalliq Project promoted 106 individuals in 2023, representing 39% of the Inuit workforce (Chart ES-5). In comparison, Baffinland reported that 21 Inuit employees, nearly 10% of its Inuit workforce, received promotions in 2023.

However, despite career advancement efforts, challenges remain in promoting Inuit employees to senior positions, with most promotions concentrated in semi-skilled roles. Factors such as limited Inuit representation at higher career levels, unfamiliarity with promotion processes, and cultural differences in self-promotion create barriers to career advancement. Finally, public-sector data further revealed that, while Inuit employees are more likely to receive promotions when they apply for one, fewer pursue these opportunities compared to non-Inuit employees.

CHART ES-5. INUIT PROMOTIONS AT AGNICO EAGLE’S KIVALLIQ PROJECTS

Year	Management and Professional	Skilled	Semi-Skilled	Unskilled	Total Promotions	Promotions as % of Inuit Employment
2018	1	6	94	34	136	48%
2019	4	4	132	32	172	54%
2020	4	0	28	7	39	12%
2021	2	2	38	15	57	18%
2022	1	1	83	14	99	34%
2023	1	2	91	12	106	39%

Source: Data provided by Agnico Eagle.

Note:

% = percent

To address gaps in Inuit employee advancement, private-sector companies and government agencies must enhance career planning discussions, increase training accessibility, and adapt interview processes to align with Inuit cultural norms. Additionally, targeted mentorship and succession planning programs could help Inuit employees transition into management and professional roles.

RECOMMENDATIONS

In consideration of the KLMA research results, the identified challenges experienced by the labour market in the Kivalliq region can be improved through collaboration between Agnico Eagle and the KIA. Broad recommendations and actions to increase workforce supply in the region and for mining-related opportunities include the following:

Recommendation 1: Strengthen Workforce Readiness Through Education and Training

- **Action 1:** Partner with local schools and NAC to support education-to-employment transitions through career guidance, internships, and job-shadowing programs.
- **Action 2:** Offer job-specific scholarships with guaranteed placement to encourage youth participation in skilled trades and professional fields.
- **Action 3:** Collaborate with NAC to develop targeted training programs and apprenticeships that align with industry needs and focus on regional delivery.
- **Action 4:** Provide job-readiness training and skills development training initiatives for adults re-entering the workforce or transitioning between industries.
- **Action 5:** Maintain and share an updated list of Agnico Eagle job opportunities and equip CLOs with career information for community outreach.

Recommendation 2: Expand Workforce Participation and Inclusivity

- **Action 1:** Implement flexible work arrangements, such as remote work and modified rotations, to support diverse workforce participation and improve retention.

Recommendation 3: Address Labour Market Challenges and Competition

- **Action 1:** Use employee exit interviews to identify strategies for improving retention, workplace experience, and employee support programs.
- **Action 2:** Develop a region-wide workforce plan in collaboration with local organizations to maximize employment opportunities rather than competing for the same labour pool.
- **Action 3:** Establish community-based employment offices or utilize Agnico Eagle's Community Liaison Officers (CLOs) to connect job seekers with available positions in mining and beyond, career guidance, and upskilling resources.
- **Action 4:** Explore the use of online employment tools to improve job matching and accessibility for Inuit job seekers.
- **Action 5:** Partner with KIA to leverage available employment funding, tax incentives, and grants to support workforce development.
- **Action 6:** Conduct community engagement to assess the willingness of local workers to participate in mining and rotational camp schedules.

Recommendation 4: Enhance Inuit Workforce Recruitment and Retention

- **Action 1:** Expand Inuit recruitment efforts through culturally relevant hiring practices and inclusive workforce planning.
- **Action 2:** Improve retention by offering competitive benefits, including performance-based bonuses, cultural leave, and retirement plans.
- **Action 3:** Develop a succession planning strategy to support Inuit advancement into skilled and management positions through training and mentorship.

By implementing these recommendations, Agnico Eagle and KIA can strengthen the regional workforce to meet the region's upcoming workforce demand.