



Are Companies Shifting Or Not?

How the Mining Sector Is
Recalibrating Its Approach to
Diversity, Equity and Inclusion

MARCH 2026

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Executive summary

Between December 2025 and February 2026, IWIM surveyed stakeholders across the mining sector to better understand how organisations are responding to the evolving global discourse on diversity, equity and inclusion (DEI), including recent debates about the role and structure of DEI programmes in organisations.

In recent years, discussions around DEI have become more prominent globally, with some organisations strengthening inclusion initiatives while others reassess their strategies in response to changing political, social and economic pressures.

Overall, the findings suggest that organisations are not uniformly retreating from DEI, but rather adjusting how inclusion initiatives are prioritised, structured and implemented. Survey responses suggest that organisational values and policy commitments largely remain in place, yet the intensity of investment, leadership visibility and organisational authority supporting implementation appears uneven.

Although recent public debates about DEI have often focused on developments in the United States, the survey responses suggest that organisations across the world and across the mining sector are reassessing how inclusion initiatives are structured and implemented.

Nearly 70% of respondents report either no change or only minor adjustments in their organisations' approach to DEI. At the same time, a smaller group of respondents report more significant shifts in strategy, resources or messaging. These response patterns suggest increasing variation in how organisations are approaching inclusion, with responses indicating continued efforts to embed inclusion into operational systems in some organisations, while others appear to be scaling back or reframing initiatives.

The data indicates that the mining sector has largely progressed beyond the stage of policy adoption. The current challenge lies in translating corporate commitments into consistent operational practice across geographically dispersed and site-based environments.

While inclusion-related considerations are widely integrated into safety and wellbeing frameworks, employees' lived experiences remain uneven across regions and work settings. This execution gap may create emerging risks related to retention, psychological safety and workforce sustainability.

Survey responses also suggest that DEI responsibilities are often distributed across organisations rather than held within a single clearly accountable function. Combined with relatively low reported authority for DEI teams and inconsistent leadership KPIs, this may contribute to variation in how inclusion initiatives are implemented across organisational units.

This transition is particularly relevant as the mining sector continues to face workforce and skills pressures. In operational environments where safety culture, workforce engagement and talent retention are critical to performance, the ability to foster inclusive and psychologically safe workplaces is increasingly recognised as a key organisational capability.

The next phase of maturity for the sector will depend on integrating inclusion more deeply into operational performance, safety culture and workforce sustainability strategies.

Key Findings

- DEI remains on organisational agendas, but priority is uneven. Average priority is 3.25/5, with 43% rating DEI as a high priority.
- Nearly half of respondents report revisiting DEI strategy. 49% of respondents report adjustments to their organisation's DEI approach.
- Resources and structures show mixed signals. 17% report reduced or eliminated budgets, and 13% report DEI teams being eliminated.
- Leadership visibility appears to be declining. 46% of respondents report that leaders raise DEI topics infrequently.
- Policy integration is widespread, but operational experience varies. 88% report DEI integrated into safety or wellbeing policies, yet 45% say workplace differences remain unaddressed.
- Authority and employee voice remain uneven. Average reported authority for DEI functions is 2.61/5.
- Signals of recalibration appear globally. Most respondents are from non-US headquartered organisations, suggesting evolving approaches beyond the US context.

What This Means for Industry Leaders

The survey findings suggest that the mining sector has moved beyond debates about whether DEI should exist. The current challenge lies in how effectively organisations integrate inclusion into operational systems, leadership accountability and workforce sustainability strategies.

- Policy maturity alone may not guarantee consistent workforce outcomes. Many respondents report established DEI policies, yet employee experiences remain uneven across sites and regions.
- Operational leadership capability is increasingly critical. As DEI becomes more decentralised, the ability of site and operational leaders to foster inclusive environments is becoming a key determinant of employee experience.
- Consistency in inclusion practices influences retention and safety culture. Uneven workplace experiences can affect psychological safety, workforce engagement and long-term retention.
- Decentralisation without accountability increases organisational variability. When DEI responsibilities are widely distributed without clear ownership or measurable outcomes, progress becomes inconsistent across organisations and business units.
- Future progress depends on operational integration. Organisations that embed inclusion within leadership accountability, operational systems and workforce strategy may be better positioned to sustain progress and support workforce retention.

Methodology & Respondent Characteristics

This report is based on an anonymous survey conducted by IWIM between December 2025 and February 2026. The survey was distributed to IWIM stakeholders across the mining and natural resources sector.

The objective of the survey was to understand how organisations are responding to evolving global discussions around diversity, equity and inclusion (DEI), including potential changes in strategy, resourcing, organisational structures and leadership engagement.

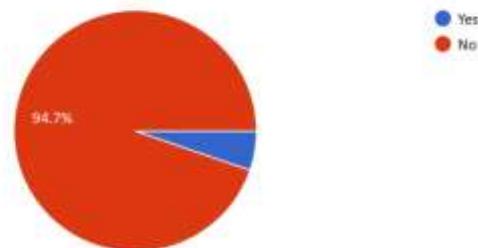
A total of 76 responses were received. Respondents represented organisations operating across multiple regions within the mining and natural resources sector.

To encourage candid participation, the survey did not collect identifying information such as company name, job title or respondent location. As a result, multiple individuals from the same organisation may be represented in the dataset.

The findings should therefore be interpreted as directional insights reflecting sector sentiment and experience, rather than statistically representative benchmarks.

In recent years, discussions around diversity, equity and inclusion (DEI) have evolved across multiple regions. Organisations in different jurisdictions have been reassessing how inclusion initiatives are structured, communicated and implemented in response to changing political, social and economic contexts. These developments prompted questions about whether companies across the mining sector were adjusting their approach to DEI and, if so, how those adjustments were being experienced internally.

Is your organisation headquartered in the USA?
76 responses



Do you have any operations in the USA (regardless of headquarter location)?
76 responses

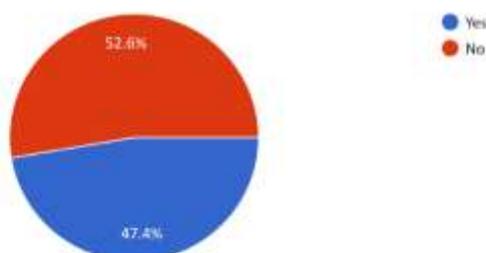


Figure 1 and 2 – US Headquarters & Operations

While only four respondents reported working for companies headquartered in the United States, approximately half indicated that their organisations operate in the US. Because the survey was anonymous and responses were not limited to one per organisation, the data does not allow for analysis of whether companies with US headquarters or operations are more likely to be adjusting their DEI strategies. However, the predominance of respondents from organisations headquartered outside the United States suggests that evolving approaches to DEI in the mining sector are not confined to US-based companies. Instead, the findings suggest that organisations may be responding to a range of internal and external factors, with different companies adopting different approaches to how inclusion initiatives are structured and implemented, rather than these patterns being explained by developments in a single country alone.

The survey included a combination of structured questions and open-ended responses. Quantitative data was analysed to identify broad patterns across the sector, while qualitative responses were reviewed to highlight emerging themes and contextual insights.

Respondents were able to provide open-text comments. These responses were reviewed qualitatively to identify recurring themes. Any potentially identifiable information contained in comments has been removed or anonymised in this report.

Detailed Findings and Analysis

1. Commitment remains, but organisational intensity is uneven

Survey responses suggest that diversity, equity and inclusion remain broadly aligned with organisational values across the sector. However, levels of organisational prioritisation, resourcing and leadership visibility vary significantly.

A. DEI Priority Score

Across respondents, the average priority rating for DEI is 3.25 out of 5. While 43% of respondents describe DEI as a top or near-top priority, approximately 30% report it as a low organisational priority.

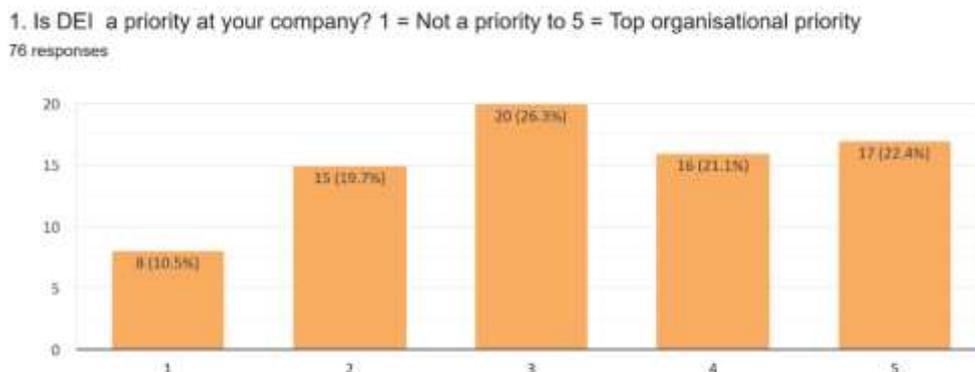


Figure 3. DEI organisational priority

The findings suggest that DEI remains present on organisational agendas but is not yet fully embedded within organisational priorities. This uneven positioning may increase the likelihood of initiatives being deprioritised when organisations face competing strategic or economic pressures.

B. DEI Maturity Score

Reported maturity levels are moderate (2.91 out of 5), suggesting that many organisations are still in the process of embedding DEI practices rather than operating mature, integrated systems.

10. How would you rate the maturity of your company's DEI initiatives (e.g., recruitment, leadership diversity, inclusive policies)? 1 = Early stage/ad hoc to 5 = Full embedded across operations
76 responses

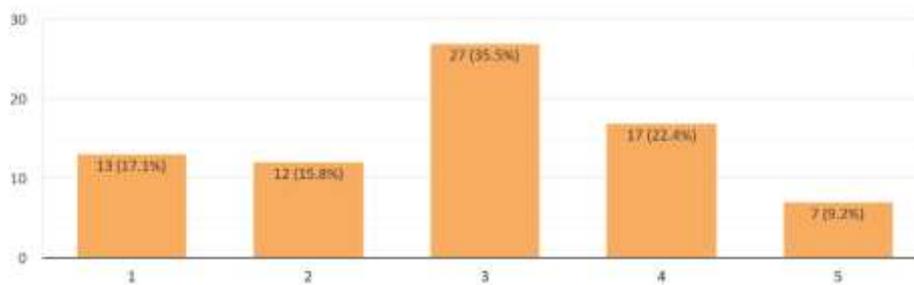


Figure 4. DEI Maturity

DEI Priority and DEI Maturity Scores taken together seem to indicate that many organisations continue to recognise the importance of DEI in principle, but implementation systems are not consistently strong or protected across the organisation.

C. DEI Strategy Revisions

Nearly 49% of respondents report that their organisation has revisited its DEI strategy, either through minor adjustments or more significant changes. Among those reporting change, responses suggest that some organisations may be shifting away from formal targets toward softer aspirations or broader cultural framing.

2. Has your company revisited its DEI strategy in response to changes in government policies or shifts in other companies' approaches?
76 responses

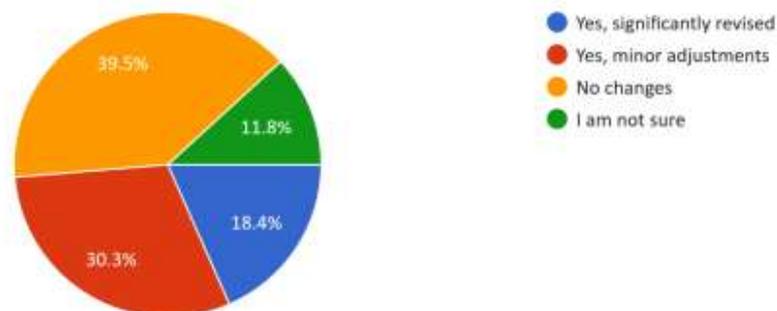


Figure 5. Changes to DEI strategy

Survey responses suggest that in some organisations, DEI may be shifting from a centrally driven leadership commitment to a more locally managed activity. While this decentralisation can support operational integration, it may also reduce organisational protection for DEI priorities when leadership visibility, resources or accountability mechanisms weaken.

D. Softer Aspirations vs Harder Targets

The survey also suggests that some organisations are shifting away from formal targets toward softer aspirations or broader cultural framing of DEI initiatives.

3. Has your company shifted from “hard” DEI targets (e.g. quotas & public targets) to “softer” aspirations/internal goals—or vice versa—in response to external scrutiny or backlash?
76 responses

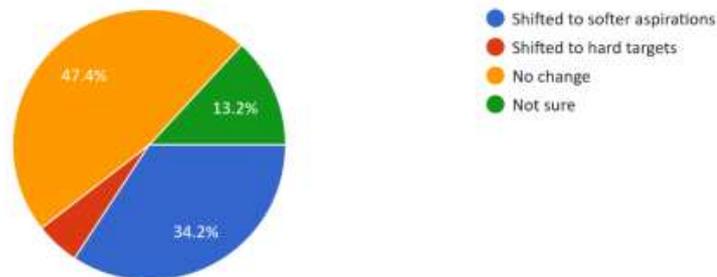


Figure 6. Aspirations vs Targets

While this shift may reflect attempts to integrate inclusion more broadly into organisational culture, it can also make progress more difficult to measure and monitor.

E. Messaging Shifts

28% report rebranding of DEI initiatives (for example toward “Culture & Belonging”), while 20% report leadership softening or revising commitments.

9. Has the name or branding of your DEI department or initiatives changed (e.g., renamed to “Culture & Belonging”) in response to external backlash or strategic repositioning?
76 responses

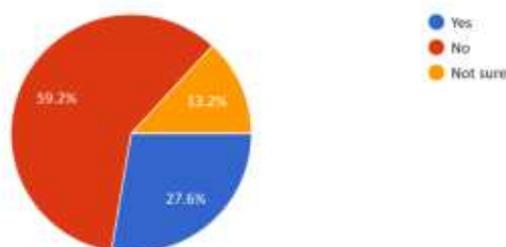


Figure 7. Is DEI framing changing

Survey responses suggest that terminology plays an important role in how inclusion initiatives are communicated within organisations. Several respondents indicated that while the underlying objectives of inclusion efforts remain similar, the language used to describe them is evolving. This aligns with survey findings indicating that some organisations may be reframing DEI initiatives under broader concepts such as culture, belonging or workforce wellbeing.

These shifts in language may reflect changing internal or external expectations, but they do not necessarily indicate a fundamental change in organisational intent. Rather, they suggest that some organisations may be adapting how inclusion initiatives are communicated while maintaining elements of their existing agendas.

F. Leadership Visibility

Survey responses suggest that senior leaders are raising DEI topics less frequently in internal communications or leadership discussions. Approximately 30% report no recent CEO or executive engagement on DEI topics.

Only 10% of respondents report increased leadership engagement, while a significant proportion report low visibility of DEI in leadership messaging.

13. Has your CEO or executive team reaffirmed or revised the company's DEI commitments in light of external pressures?
76 responses

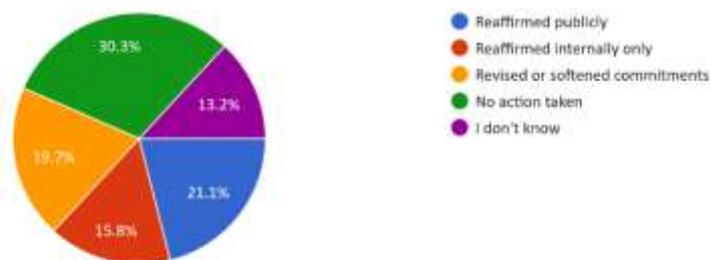


Figure 8. Leadership DEI commitments

Leadership visibility appears to be declining in some organisations.

12. Over the past 12 months, have senior leaders addressed DEI more or less frequently compared to before in response to external events (e.g., legal...orate trends)? 1= Not at all to 5 = More frequently
76 responses

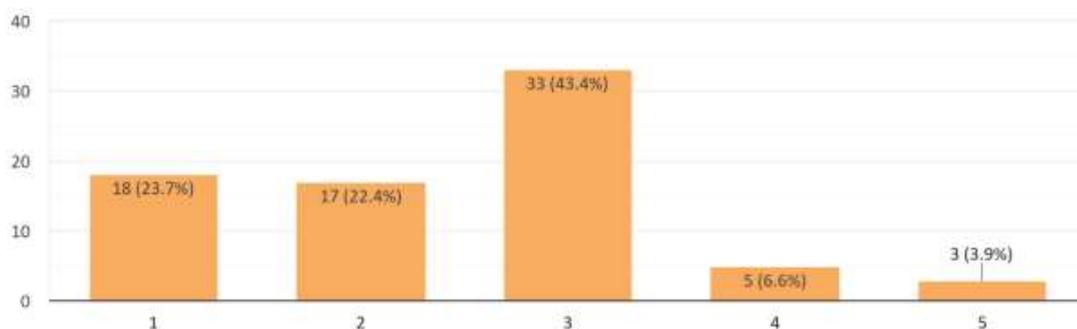


Figure 9. Leadership expressing DEI statements

G. KPI Variation

Survey responses indicate that accountability mechanisms for DEI are inconsistent across organisations.

Leadership performance metrics related to DEI vary widely:

- 22 respondents report having DEI-related KPIs that are monitored but not linked to bonuses or compensation
- 18 report that DEI metrics are included in leadership bonus structures
- 18 report no DEI-related KPIs at all
- 14 report that DEI metrics are only tracked within HR functions
- 4 respondents report uncertainty about whether DEI KPIs exist

4. Are DEI objectives part of measurable targets or KPIs at your company?

76 responses



Figure 10. KPI Variation

This distribution suggests that respondents perceive considerable variation in how organisations measure and reinforce DEI outcomes. Overall, the findings suggest that DEI accountability structures across the sector remain uneven, with varying levels of integration into leadership evaluation and decision-making processes.

While some respondents report that DEI objectives are incorporated into leadership performance metrics or bonus structures, others indicate that no formal targets exist. In organisations where DEI objectives are integrated into leadership KPIs or incentive structures, commitments may be more consistently translated into operational action. Where DEI commitments are not linked to leadership performance metrics, initiatives may rely more heavily on organisational culture or individual leadership priorities rather than formal accountability mechanisms.

Chapter Conclusion

In some companies, DEI appears to be transitioning from a central leadership commitment to a more locally managed activity. While organisational values remain broadly supportive of inclusion, the systems that previously reinforced those commitments—such as clear targets, leadership messaging and dedicated resources—appear to be weakening in some organisations.

As a result, progress may increasingly depend on how inclusion priorities are interpreted and implemented across different organisational settings, which may contribute to uneven employee experiences across regions, sites and teams.

This suggests the sector is currently in a transitional stage of maturity: DEI is neither being abandoned nor fully embedded as a core operational system.

2. Governance and organisational capability vary across organisations

Several indicators suggest adjustments in how DEI is resourced and positioned internally, including team size, budget and decision-making authority.

This section looks at how organisations are resourcing and structuring DEI.

A. DEI Ownership Structure

Most organisations report not having a dedicated central DEI function:

- 41% distribute DEI responsibilities across multiple departments
- 21% report having a dedicated DEI team
- 17% rely on a single individual within another department
- 13% report uncertainty about who holds responsibility for DEI

5. Do you have a dedicated DEI team at your company or is DEI is dealt with via another department like human resources for example?

76 responses



Figure 11. DEI organisational structure

Survey responses indicate that responsibility for DEI is often distributed across organisations rather than held within a single central function, and in some organisations may be reducing or being redistributed across functions.

Respondents report that DEI responsibilities frequently sit across multiple departments or with individual staff members, while leadership accountability mechanisms such as KPIs remain inconsistent.

B. Team Size Changes

Changes in DEI team size over the past year further suggest a mixed picture across organisations:

- Some organisations report eliminating DEI roles or teams entirely.
- Others report reductions in team size or redistribution of responsibilities across functions.
- We see limited organisational reach: 22% report DEI responsibilities held by a single individual or within a single department, limiting organisational influence.
- A smaller number report expanding DEI capability or increasing team size.
- Many organisations report no change to existing structures.

6. Have people responsible for DEI at your company changed over the last 12 months?

76 responses

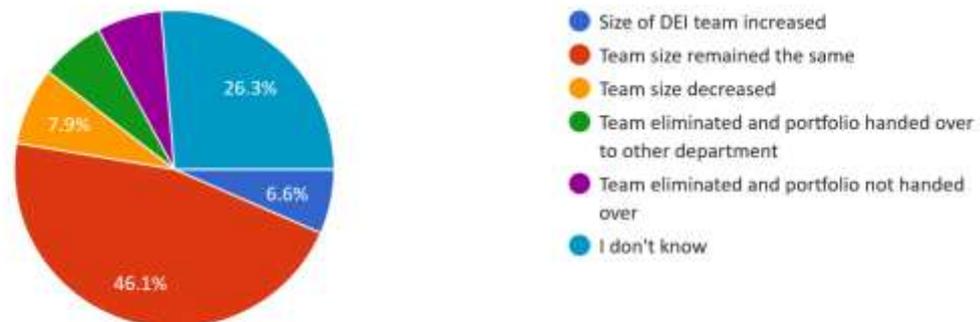


Figure 12. Size of DEI Teams

A noticeable portion of organisations are reducing or removing DEI roles, signalling lower investment, restructuring pressure, or shifting corporate priorities. DEI may exist but may lack sufficient decision-making power in some organisations. At the same time, some organisations are strengthening DEI. This suggests that the landscape is becoming more varied rather than moving uniformly in one direction.

This fragmentation makes it difficult to drive consistent standards, monitor progress or respond to emerging risks, which weakens accountability.

Interpretation: DEI Ownership Structure & Team Changes

When DEI organisational structure and team size are considered together, the response patterns suggest considerable variation in how organisations structure and resource inclusion initiatives. These findings indicate that the sector is not moving uniformly in one direction. Instead, organisations appear to be adopting different approaches depending on their internal priorities, leadership commitment and organisational context.

While some responses indicate organisations maintaining or strengthening DEI capability, others point to reductions in dedicated roles or redistribution of responsibilities across functions. Overall, the findings suggest a period of organisational divergence, where approaches to inclusion capability and resourcing are becoming increasingly varied across the sector.

C. Budget Changes

17% report DEI budgets have been reduced or eliminated, while 41% report budgets remaining stable. A large proportion of respondents (37%) report uncertainty about budget status, suggesting limited visibility into DEI investment.

11. Has the budget for DEI related initiatives at your company changed over the past 12 months?

76 responses

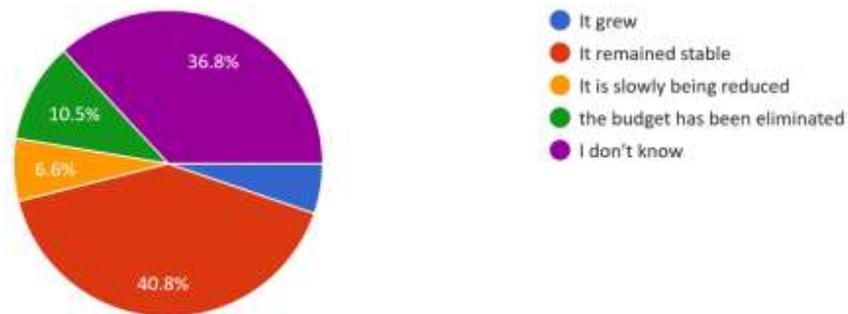


Figure 13. DEI expenditure

D. Authority Score

Many respondents report that DEI functions lack sufficient organisational authority to drive change. Survey responses indicate that the average perceived authority of DEI teams is 2.61 out of 5, suggesting relatively limited influence within organisational decision-making structures. In addition:

- 42% of respondents report low organisational authority for DEI functions
- Only 26% report high levels of authority

7. To what extent do DEI teams in your organisation have the authority to effectively drive change?

1= Very limited authority to 5 = Full authority

76 responses

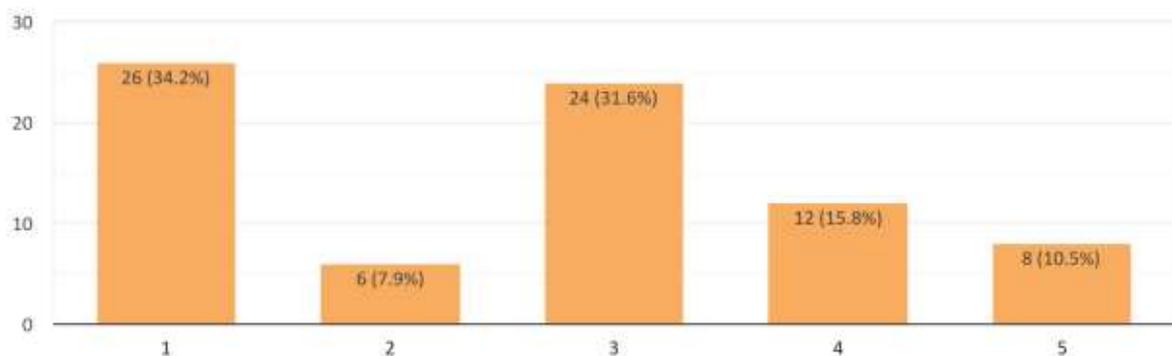


Figure 14. DEI organisational authority

These findings suggest that although DEI initiatives may exist formally within organisational structures, the functions responsible for advancing inclusion may not always have the decision-making power required to influence broader organisational systems.

In practical terms, DEI may be present within organisational structures but not fully integrated into leadership decision-making, performance systems or operational governance, and therefore unlikely to drive structural change or hold leaders accountable

This reinforces the broader pattern identified in the survey: survey responses suggest that many mining organisations appear to have established policy commitments, but the authority and organisational integration required to implement them consistently across operations remains uneven.

As a result, the sector’s current challenge is less about adopting DEI frameworks and more about ensuring that the structures responsible for advancing inclusion have sufficient influence to translate commitments into operational practice. Inclusion outcomes may increasingly depend on how priorities are interpreted and acted on across different organisational settings, leading to more variable employee experiences across different regions, sites and operational contexts.

Observation

The predominance of responses from organisations headquartered outside the United States suggests that evolving approaches to DEI in the mining sector are not confined to a single geography. Rather, the findings indicate that organisations across regions may be adjusting how inclusion initiatives are structured and implemented.

3. Policy integration has progressed, but operational experience remains uneven

Survey findings indicate that many mining organisations have established policy frameworks related to diversity, equity and inclusion. However, the authority and organisational influence required to implement these policies consistently across operations remains uneven. One factor contributing to this challenge is the global and operational complexity of the mining sector.

A. DEI Integration into Health, Safety & Wellbeing

A large majority of respondents (88%) report that DEI-related harms or concerns are integrated into health, safety and wellbeing frameworks within their organisations. This indicates that many companies have formally recognised inclusion as part of workforce wellbeing and organisational risk management.

14. Are DEI-related issues (e.g., bullying, homophobia, misogyny, racism, harassment, gender-based violence, discrimination, exclusion) f...workplace health, safety, and well-being policies?
76 responses

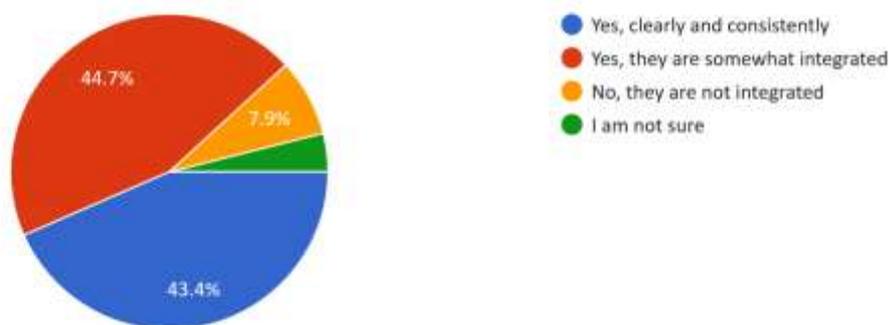


Figure 15. Integration of DEI into HSW frameworks

Survey responses suggest that while many mining organisations have integrated diversity, equity and inclusion considerations into formal policies, the effectiveness of implementation across operational environments remains uneven.

B. Frontline vs Corporate Differences

When asked whether differences in DEI experiences across frontline, corporate and remote working environments are being addressed:

- 45% of respondents report that these differences across frontline/corporate/remote settings are not currently being addressed
- 24% report that their organisations are actively addressing these differences
- 25% report that they do not observe major differences across environments

17. In your view, do you feel that employee experiences vary significantly across different work environments (e.g., frontline, remote, corporate), ... company actively responding to those differences?
76 responses

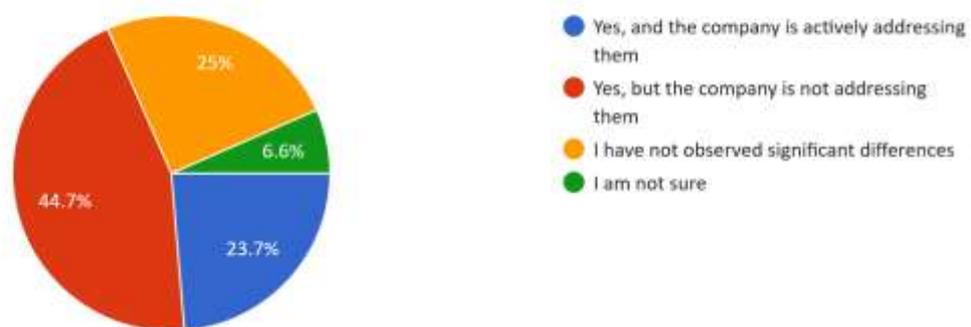


Figure 16. Employee frontline experiences

The responses suggest that many organisations have established policy frameworks, but implementation is not always consistent, especially across varied worksites. This points to a “policy–practice gap”: DEI values exist but employees don’t experience them equally.

C. Regional Variation

Respondents report significant variation in employee experiences across regions, with 67% indicating that DEI experiences differ across geographical locations within their organisations. This can be a reflection of the operational complexity of global mining organisations.

Open-text responses from survey participants reinforce this pattern. Several respondents noted that inclusion initiatives often appear more established within corporate environments than in operational or site-based settings. This suggests that while policies may be developed centrally, translating these commitments into consistent practices across operational worksites remains a challenge for many organisations.

18. If you are a global business or operate in several countries/continents, do you see regional differences in employee experiences?

76 responses



Figure 17. Regional differences

These regional differences reflect the diverse cultural, legal and operational environments in which mining companies operate. Organisations must often navigate varying regulatory frameworks, workforce demographics and social contexts across jurisdictions. As a result, maintaining consistent inclusion practices across global operations can be difficult.

These findings suggest that while policy frameworks are widely established, implementation across operational contexts remains inconsistent.

This gap between policy commitments and operational experience may reflect the complexity of implementing inclusion practices across geographically dispersed operations, site-based environments and diverse workforce structures.

As a result, many organisations appear to have progressed beyond the initial stage of policy development but may still face challenges related to execution authority, operational consistency and organisational influence. In practical terms, the systems supporting inclusion may exist on paper, but the authority, resources and operational integration required to implement them consistently across sites may remain limited.

D. Reporting Confidence

Respondents also report limited confidence in reporting harmful experiences, indicating potential gaps in psychological safety and organisational trust.

16. In your view, do you feel that under-represented groups are confident in reporting negative experiences (racism, bullying, sexism) related to Diversity? 1= Not confident to 5 = Extremely confident

76 responses

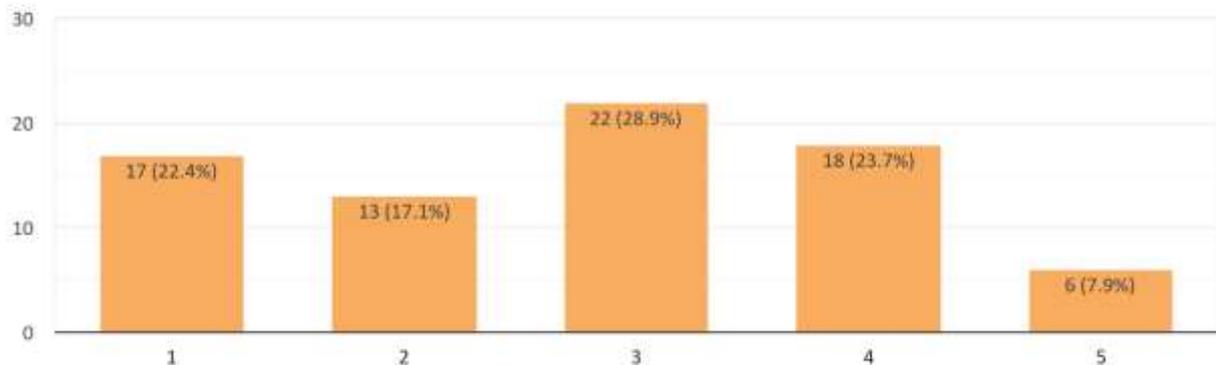


Figure 18. Reporting Confidence

DEI challenges are contextual, not universal. Organisations struggle to maintain one standard across different cultural, legal, and operational environments. This complicates DEI execution and potentially increases risk.

Interpretation: Retention/Psychological safety implications

Survey findings suggest that gaps between policy commitments and operational practice may create emerging workforce risks for organisations in the mining sector. While many organisations have established DEI policies and frameworks, uneven implementation across operational environments may affect employee experience, psychological safety and long-term workforce retention.

Survey responses indicate that several factors may contribute to this challenge, including:

- Limited organisational authority for DEI functions
- Differences in inclusion practices across frontline and corporate environments
- Low confidence in reporting harmful experiences in some organisations

Taken together, these patterns may create potential risks for workforce retention and psychological safety. Psychological safety is widely recognised as an important factor influencing employee engagement, safety culture and retention.

In this context, workforce risks may arise not from the absence of policy commitments, but from inconsistent lived experiences across organisational environments. Where employees experience uneven inclusion practices across sites or regions, organisations may face increased challenges related to retention, workforce engagement and organisational trust.

For the mining sector, where competition for skilled labour remains high and operational environments depend heavily on strong safety culture, these dynamics highlight the importance of translating inclusion commitments into consistent operational practice.

This suggests that the current challenge facing the sector is not policy adoption, but the translation of policy commitments into consistent operational practice across organisational environments. In this context, potential risks to workforce retention and psychological safety may stem less from the absence of policy and more from inconsistent lived experience across organisational settings.

Emerging Issues Raised by Respondents

In addition to the structured survey questions, respondents were invited to provide open-ended comments. While not all participants elaborated, several themes emerged across the qualitative responses that help contextualise the survey findings.

These comments suggest that inclusion challenges in the mining sector extend beyond formal policy frameworks and are shaped by operational realities, workforce composition and regional context.

Open-text responses also suggest that operational workforce dynamics, leadership engagement and regional context remain important factors shaping how inclusion initiatives are experienced in practice.

Several themes emerged:

Operational workforce experiences: Several respondents highlighted differences between corporate and operational environments, particularly for site-based or contractor workforces. Respondents suggested that inclusion initiatives are often designed with corporate settings in mind and may not translate easily into site-based or operational contexts.

Regional complexity: Respondents from global organisations noted the difficulty of maintaining consistent inclusion practices across regions with different cultural norms, legal frameworks and social expectations. This reinforces the survey finding that employee experiences vary significantly across geographical locations.

Workplace culture and everyday behaviours: Several respondents highlighted concerns related to everyday workplace behaviours, including sexism, microaggressions and exclusionary practices that may not always be captured through formal policies or reporting mechanisms but still affect employees' sense of belonging and inclusion.

Organisational culture and merit narratives: Some respondents expressed views about balancing inclusion initiatives with merit-based hiring and promotion practices. These comments highlight ongoing debates within organisations about how inclusion strategies are implemented and communicated.

Leadership engagement: A number of comments referenced the importance of visible leadership support in sustaining inclusion initiatives, reinforcing survey findings that leadership engagement and organisational authority remain key factors shaping implementation.

Age inclusion/age-related bias: Several respondents highlighted concerns related to age inclusion and ageism, suggesting that workforce discussions around inclusion often focus primarily on gender and ethnicity while overlooking age diversity.

Contractor and site-based workforce experiences: Respondents noted that contractors and site-based workers may experience different workplace cultures and inclusion practices compared with corporate staff. These differences may contribute to uneven experiences across operational environments.

LGBTQ+: Global mining companies often operate across jurisdictions where social norms and legal frameworks differ significantly. Respondents highlighted challenges related to maintaining inclusive workplace standards in regions where certain identities, including LGBTQ+ identity, may face legal or social restrictions.

Gendered health experiences: A smaller number of comments referenced issues such as menopause and other gender-related health considerations, suggesting that these topics are gaining visibility but may still be underdeveloped in workplace policies.

Geared more to large companies rather than mid-sized or SMEs: Some respondents observed that many current DEI approaches appear designed for large multinational organisations and may be more difficult to implement in mid-sized companies or smaller operators.

These themes suggest that inclusion challenges in the mining sector continue to evolve and are shaped not only by formal policies, but also by operational context, workforce composition and regional realities. They warrant further attention from organisations and sector leaders.

Conclusion

This survey provides a snapshot of how organisations across the mining sector are responding to the evolving global conversation on diversity, equity and inclusion.

The findings suggest that the sector is not experiencing a uniform retreat from DEI, but rather a period of recalibration and organisational divergence. Many respondents indicate that organisations continue to maintain policy commitments and recognise the importance of inclusive workplaces. At the same time, the intensity of leadership visibility, investment and organisational authority supporting implementation appears uneven.

This variation in organisational capability may contribute to increasingly uneven employee experiences across organisations in the sector. Where DEI responsibilities are widely distributed without clear ownership, organisations may find it more difficult to maintain consistent standards, monitor progress or respond effectively to emerging workforce risks. As a result, the sector may be entering a phase where approaches to inclusion may be becoming more differentiated across companies, rather than following a single trajectory.

For industry leaders, this divergence may have implications for workforce retention, organisational reputation and the ability to attract and retain skilled employees in an increasingly competitive labour market.

Across the survey responses, a consistent pattern emerges: policy adoption appears to have progressed more consistently than operational execution. Inclusion considerations are frequently integrated into health, safety and wellbeing frameworks, yet employee experiences may differ across regions, operational environments and organisational units.

This gap between policy commitments and lived experience represents the next stage of maturity for the sector. As mining companies operate across complex global environments and face growing workforce and skills pressures, the ability to translate inclusion commitments into consistent operational practice will become increasingly important.

In this context, the challenge for organisations is less about establishing DEI frameworks and more about ensuring that inclusion is embedded within leadership accountability, operational systems and workforce strategy.

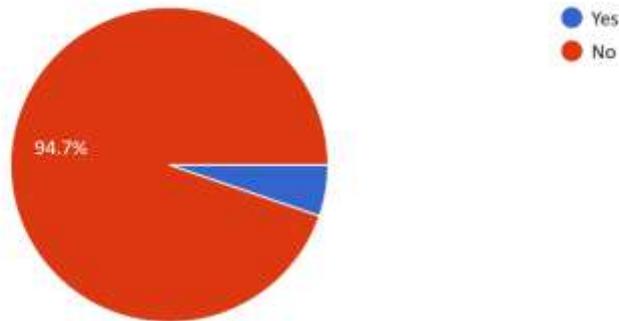
For the mining sector, where safety culture, workforce engagement and talent retention are critical to long-term performance, strengthening the connection between policy intent and everyday workplace experience will be essential.

The findings of this survey provide an initial evidence base for understanding how organisations are navigating this evolving landscape. Continued dialogue, shared learning and further research will help the sector identify effective approaches for sustaining inclusive workplaces across diverse operational contexts.

Annex I – Survey Graphs

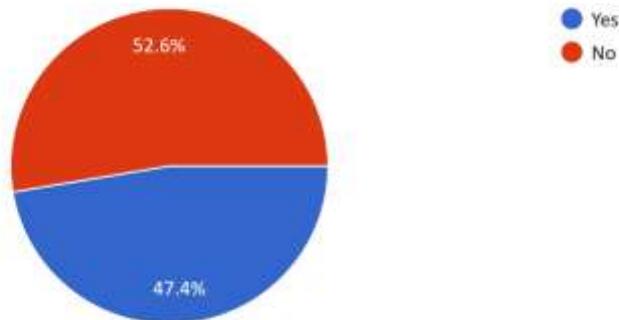
Is your organisation headquartered in the USA?

76 responses



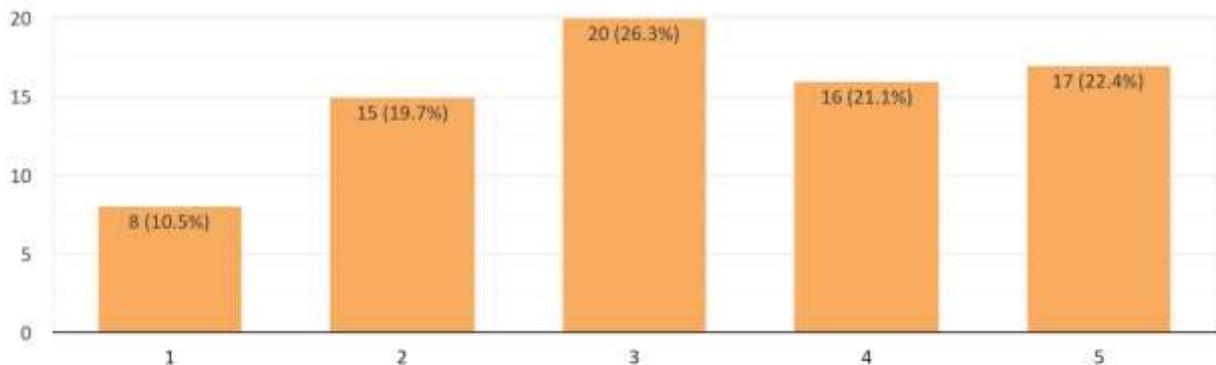
Do you have any operations in the USA (regardless of headquarter location)?

76 responses



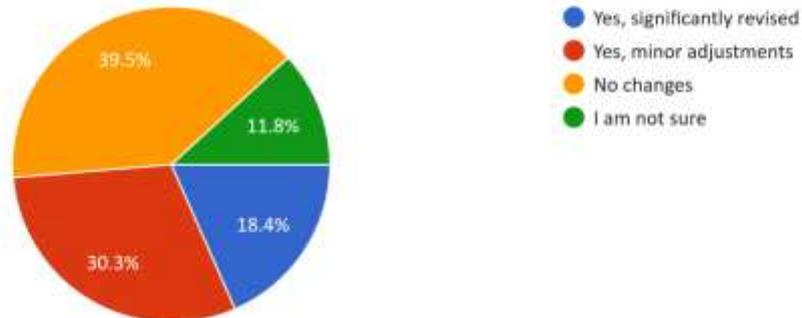
1. Is DEI a priority at your company? 1 = Not a priority to 5 = Top organisational priority

76 responses



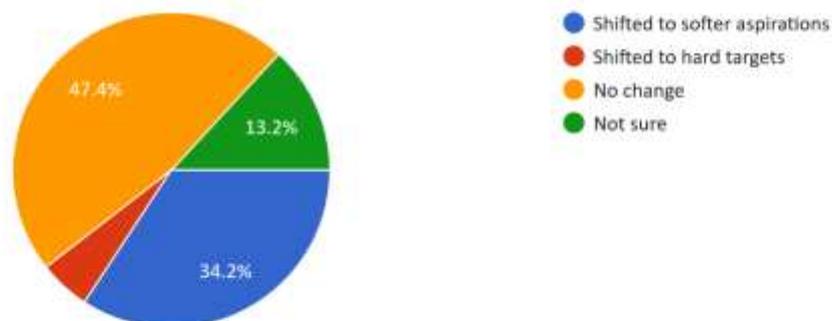
2. Has your company revisited its DEI strategy in response to changes in government policies or shifts in other companies' approaches?

76 responses



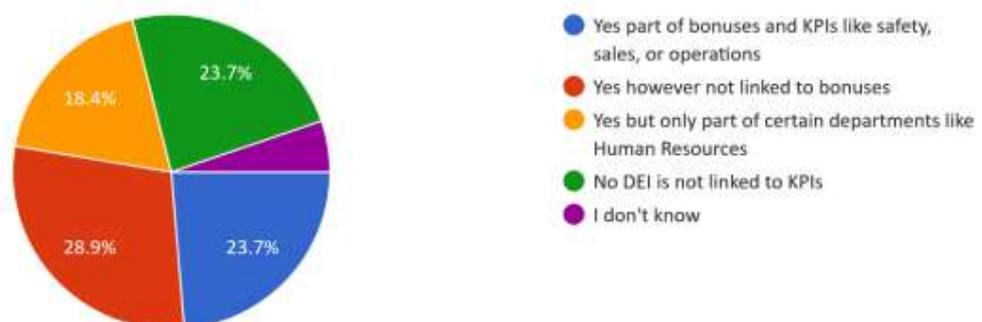
3. Has your company shifted from "hard" DEI targets (e.g. quotas & public targets) to "softer" aspirations/internal goals—or vice versa—in response to external scrutiny or backlash?

76 responses



4. Are DEI objectives part of measurable targets or KPIs at your company?

76 responses



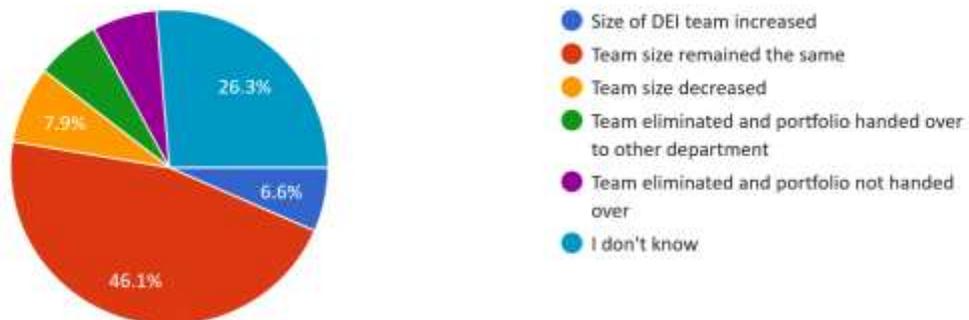
5. Do you have a dedicated DEI team at your company or is DEI is dealt with via another department like human resources for example?

76 responses



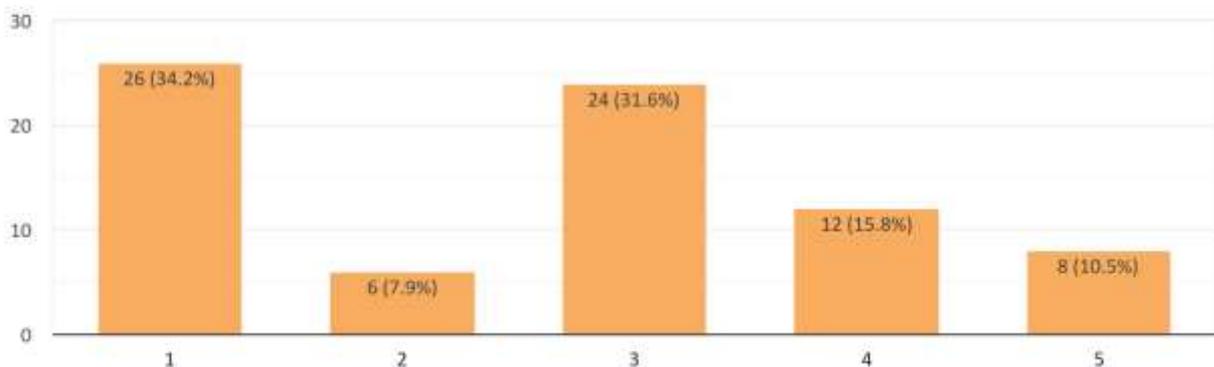
6. Have people responsible for DEI at your company changed over the last 12 months?

76 responses



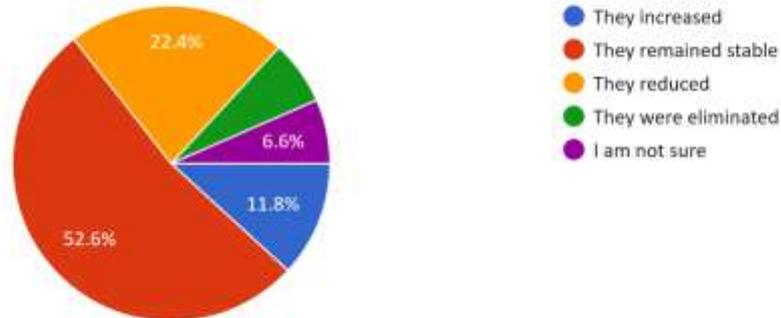
7. To what extent do DEI teams in your organisation have the authority to effectively drive change?
1= Very limited authority to 5 = Full authority

76 responses



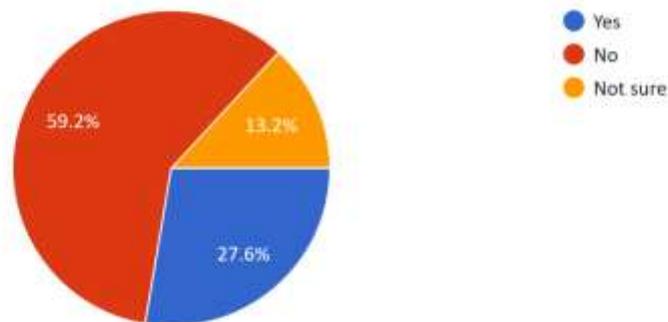
8. Have DEI initiatives at your company changed in the past 12 months?

76 responses



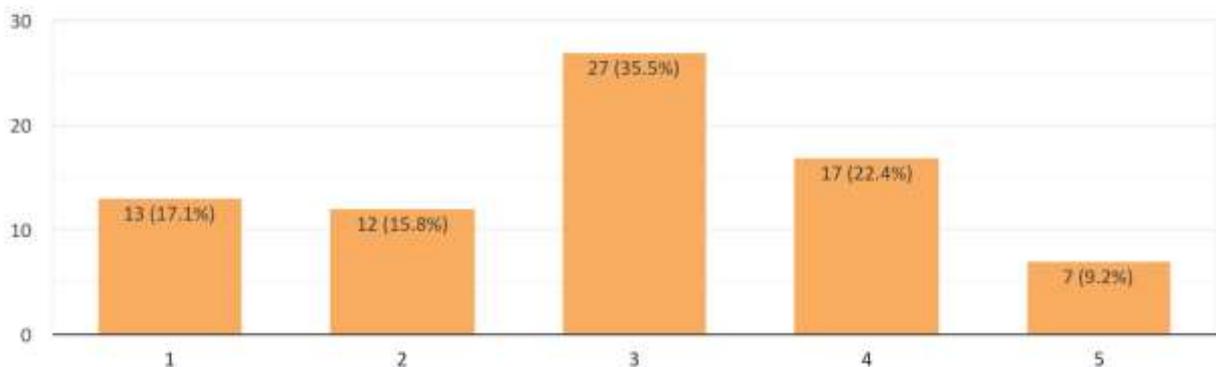
9. Has the name or branding of your DEI department or initiatives changed (e.g., renamed to "Culture & Belonging") in response to external backlash or strategic repositioning?

76 responses



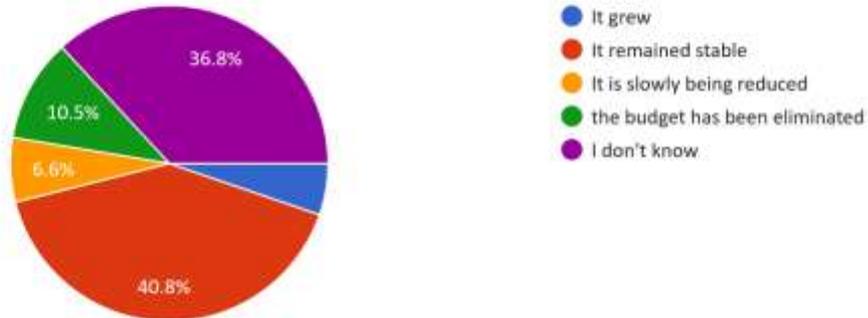
10. How would you rate the maturity of your company's DEI initiatives (e.g., recruitment, leadership diversity, inclusive policies)? 1 = Early stage/ad hoc to 5 = Full embedded across operations

76 responses



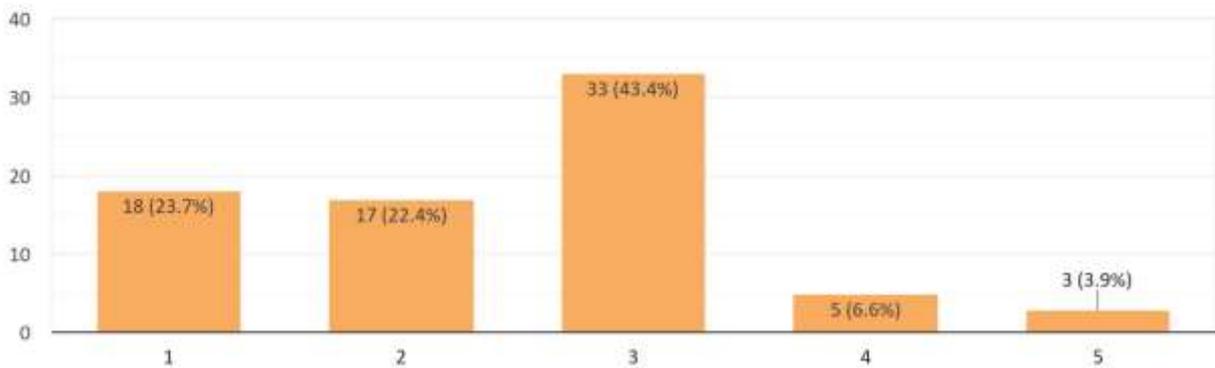
11. Has the budget for DEI related initiatives at your company changed over the past 12 months?

76 responses



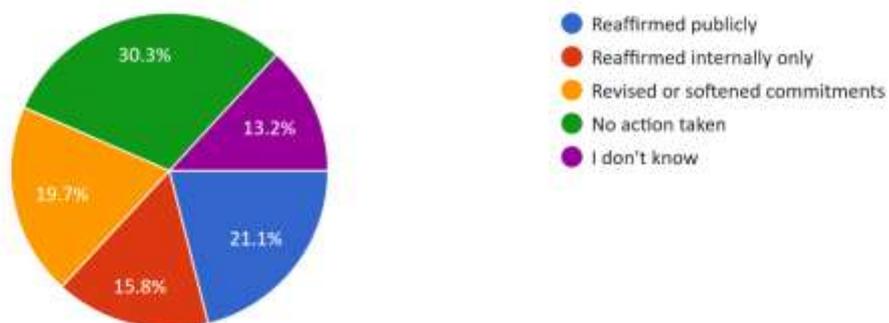
12. Over the past 12 months, have senior leaders addressed DEI more or less frequently compared to before in response to external events (e.g., legal...orate trends)? 1= Not at all to 5 = More frequently

76 responses



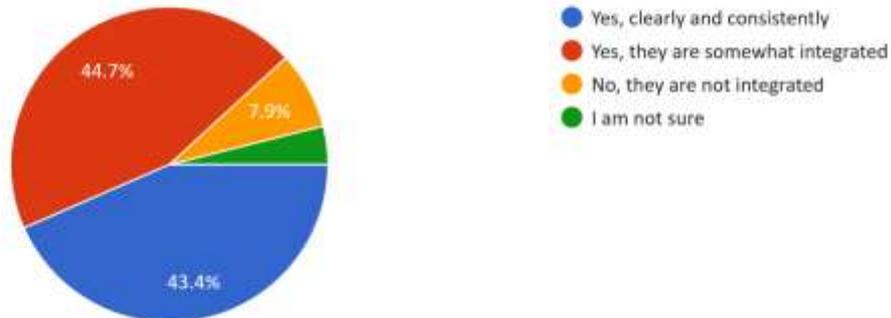
13. Has your CEO or executive team reaffirmed or revised the company's DEI commitments in light of external pressures?

76 responses



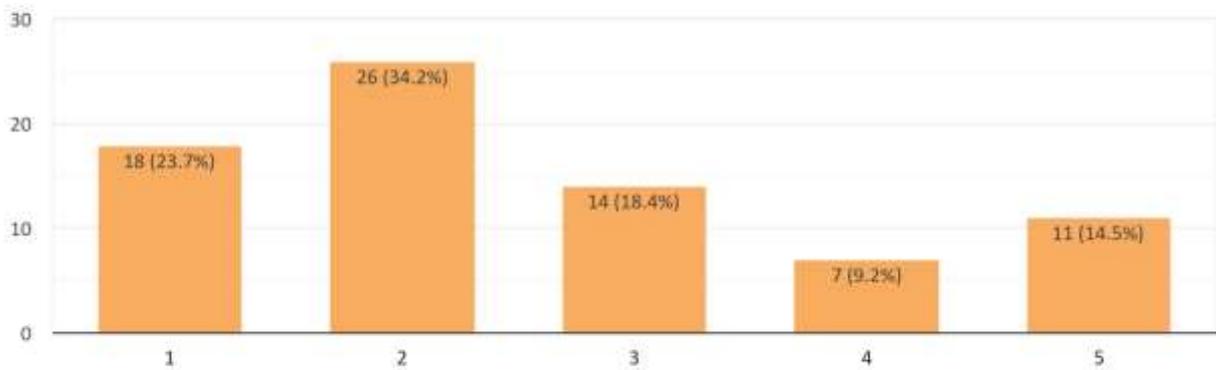
14. Are DEI-related issues (e.g., bullying, homophobia, misogyny, racism, harassment, gender-based violence, discrimination, exclusion) f...workplace health, safety, and well-being policies?

76 responses



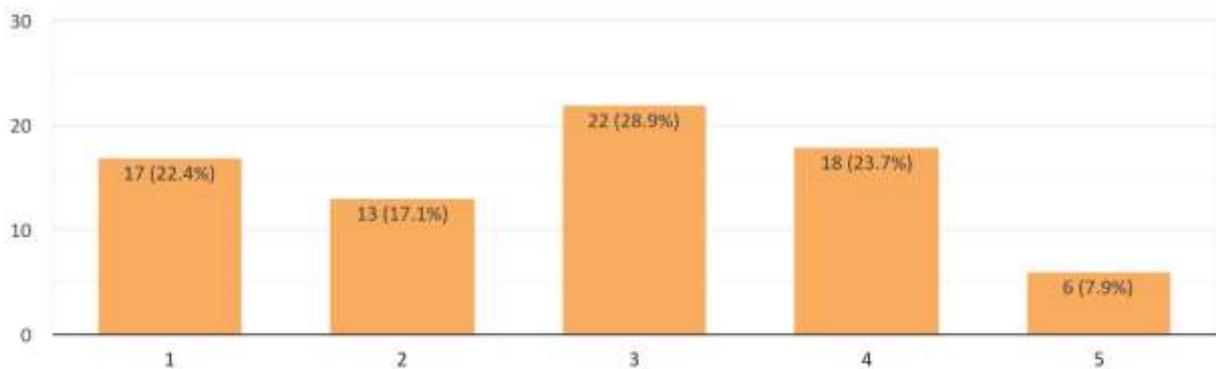
15. How frequently have you observed colleagues expressing concerns about your company's DEI stance in the past year? 1= Never to 5 = Very frequently (5+ times)

76 responses



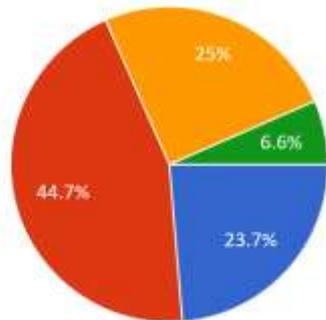
16. In your view, do you feel that under-represented groups are confident in reporting negative experiences (racism, bullying, sexism) related to D...risal? 1= Not confident to 5 = Extremely confident

76 responses



17. In your view, do you feel that employee experiences vary significantly across different work environments (e.g., frontline, remote, corporate), ... company actively responding to those differences?

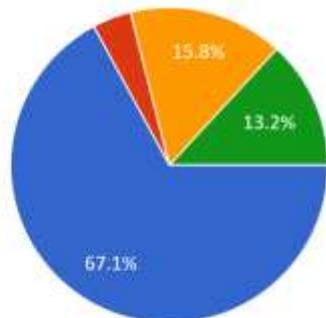
76 responses



- Yes, and the company is actively addressing them
- Yes, but the company is not addressing them
- I have not observed significant differences
- I am not sure

18. If you are a global business or operate in several countries/continents, do you see regional differences in employee experiences?

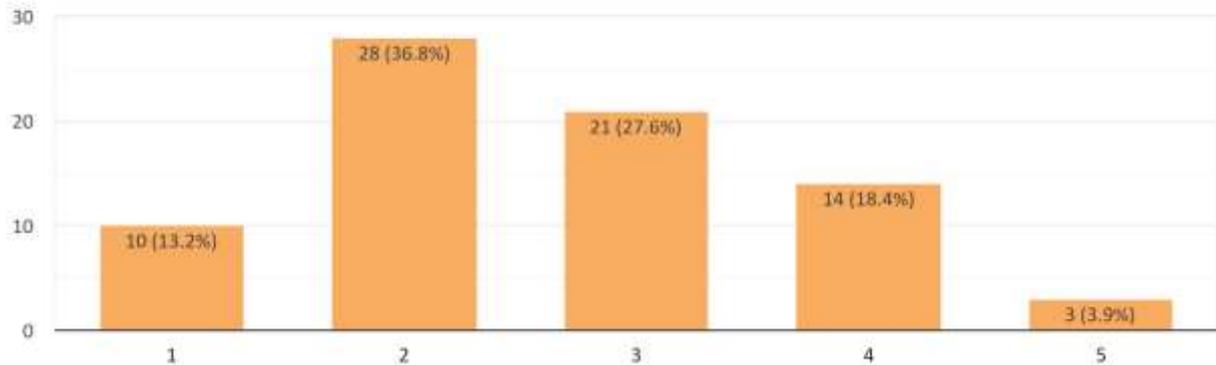
76 responses



- Yes
- No
- I don't know
- Don't operate in several jurisdictions = doesn't apply

19. How often do people with intersecting historically underrepresented identities (e.g., women of colour, LGBTQ+, people with disabilities, etc.) participate steering, hiring panels)? 1 = Never to 5 = Always

76 responses



Annex II – Survey Questions & Responses

Is your organisation headquartered in the USA?

72 No | 4 Yes

Do you have any operations in the USA (regardless of headquarter location)?

40 No | 36 Yes

1. Is DEI a priority at your company? 1 = Not a priority to 5 = Top organisational priority

1 = 8 responses | 2 = 15 responses | 3 = 20 Responses | 4 = 16 responses | 5 = 17 responses

2. Has your company revisited its DEI strategy in response to changes in government policies or shifts in other companies' approaches?

- Yes, significantly revised
- Yes, minor adjustments
- No changes
- I am not sure

Yes, significantly revised = 14 responses | Yes minor adjustments = 23 responses | No changes = 30 responses

I am not sure = 9 responses

3. Has your company shifted from “hard” DEI targets (e.g. quotas & public targets) to “softer” aspirations/internal goals—or vice versa—in response to external scrutiny or backlash?

- Shifted to softer aspirations
- Shifted to hard targets
- No change
- Not sure

Shifted to softer aspirations = 26 responses | Shifted to hard targets = 4 responses

No change = 36 responses Not sure = 10 responses

4. Are DEI objectives part of measurable targets or KPIs at your company?

- Yes, part of bonuses and KPIs like safety, sales, or operations
- Yes, however not linked to bonuses
- Yes, but only part of certain departments like Human Resources
- No DEI is not linked to KPIs
- I don't know

Yes, linked to bonus & KPI = 18 responses | Yes & not linked to bonus = 22 responses
 Yes, but only certain departments = 14 responses | DEI not linked to KPIs = 18 responses
 I don't know = 4 responses

5. Do you have a dedicated DEI team at your company or is DEI is dealt with via another department like human resources for example?

- We have a dedicated DEI team
- We have one dedicated DEI person
- DEI is covered by 1 person within another department
- DEI is covered by several people across one or several departments
- I don't know

Dedicated team = 16 responses | 1 dedicated person = 6 responses | I don't know = 10 responses
 Covered by 1 person in other dept = 13 responses | DEI across people & depts = 31 responses

6. Have people responsible for DEI at your company changed over the last 12 months?

- Size of DEI team increased
- Team size remained the same
- Team size decreased
- Team eliminated and portfolio handed over to another department
- Team eliminated and portfolio not handed over
- I don't know

Remained the same = 35 responses | I don't know = 20 responses | Decreased = 6 responses
 Increased = 5 responses | Eliminated = 5 responses

7. To what extent do DEI teams in your organisation have the authority to effectively drive change? 1= Very limited authority to 5 = Full authority

1 = 26 responses | 2 = 6 responses | 3 = 24 responses | 4 = 12 responses | 5 = 8 responses

8. Have DEI initiatives at your company changed in the past 12 months?

- They increased
- They remained stable
- They reduced
- They were eliminated
- I am not sure

Increased = 9 responses | Remained stable = 40 responses | Reduced = 17 responses
 Eliminated = 5 responses | Not sure = 5 responses

9. Has the name or branding of your DEI department or initiatives changed (e.g., renamed to "Culture & Belonging") in response to external backlash or strategic repositioning?

- Yes
- No
- Not sure

Yes = 21 responses | No = 45 responses | Not sure = 10 responses

10. How would you rate the maturity of your company's DEI initiatives (e.g., recruitment, leadership diversity, inclusive policies)? 1 = Early stage/ad hoc to 5 = Full embedded across operations

1 = 13 responses | 2 = 12 responses | 3 = 27 responses | 4 = 17 responses | 5 = 7 responses

11. Has the budget for DEI related initiatives at your company changed over the past 12 months?

- It grew
- It remained stable
- It is slowly being reduced
- the budget has been eliminated
- I don't know

Grew = 4 responses | Stable = 31 responses | Reduced = 5 responses | Eliminated = 8 responses

Don't know = 28 responses

12. Over the past 12 months, have senior leaders addressed DEI more or less frequently compared to before in response to external events (e.g., legal rulings, media coverage, corporate trends)? 1= Not at all to 5 = More frequently

1 = 18 responses | 2 = 17 responses | 3 = 33 responses | 4 = 5 responses | 5 = 3 responses

13. Has your CEO or executive team reaffirmed or revised the company's DEI commitments in light of external pressures?

- Reaffirmed publicly
- Reaffirmed internally only
- Revised or softened commitments
- No action taken
- I don't know

Reaffirmed publicly = 16 responses | Reaffirmed internally = 12 responses | Revised = 15 responses

No action = 23 responses | Don't know = 10 responses

14. Are DEI-related issues (e.g., bullying, homophobia, misogyny, racism, harassment, gender-based violence, discrimination, exclusion) formally integrated into workplace health, safety, and well-being policies?

- Yes, clearly and consistently
- Yes, they are somewhat integrated
- No, they are not integrated
- I am not sure

Clearly & consistently = 33 responses | Somewhat integrated = 34 responses

Not integrated = 6 responses | Not sure = 3 responses

15. How frequently have you observed colleagues expressing concerns about your company's DEI stance in the past year? 1= Never to 5 = Very frequently (5+ times)

1 = 18 responses | 2 = 26 responses | 3 = 14 responses | 4 = 7 responses | 5 = 11 responses

16. In your view, do you feel that under-represented groups are confident in reporting negative experiences (racism, bullying, sexism) related to DEI, without fear of reprisal? 1= Not confident to 5 = Extremely confident

1 = 17 responses | 2 = 13 responses | 3 = 22 responses | 4 = 18 responses | 5 = 6 responses

17. In your view, do you feel that employee experiences vary significantly across different work environments (e.g., frontline, remote, corporate), and is the company actively responding to those differences?

- Yes, and the company is actively addressing them
- Yes, but the company is not addressing them
- I have not observed significant differences
- I am not sure

Yes & company actively addressing = 18 responses | Yes & not addressing = 34 responses

Not observed differences = 19 responses | Not sure = 5 responses

18. If you are a global business or operate in several countries/continents, do you see regional differences in employee experiences?

- Yes
- No
- I don't know
- Don't operate in several jurisdictions = doesn't apply

Yes = 51 responses | No = 3 responses | Don't know = 12 responses | Doesn't apply = 10 responses

19. How often do people with intersecting historically underrepresented identities (e.g., women of colour, LGBTQ+, people with disabilities, etc.) participate in or influence key decision-making processes (e.g., leadership, project steering, hiring panels)? 1 = Never to 5 = Always

1 = 10 responses | 2 = 28 responses | 3 = 21 responses | 4 = 14 responses | 5 = 3 responses

There may be a lot to unpack. Leaving some blank space below if you wish to elaborate on any specific area.



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