



Acknowledgments

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GM Wants "Everybody In" on Greenwashing

WHY THE AUTOMOTIVE INDUSTRY?

The automotive industry is critical to achieving net-zero global emissions by 2050, a key part of the road map for limiting global warming to 1.5 degrees Celsius above preindustrial levels. Responsible for 9% of global greenhouse gas (GHG) emissions annually, the auto industry is also a major consumer of materials that contribute the most to global emissions. High-carbon vehicle materials like steel and aluminum account for 8% and 2% of global annual emissions, respectively. The auto sector consumes 12% of global steel and 18% of global aluminum annually. Because the automotive industry is a major emitter of GHGs and consumer of high-carbon materials, decarbonizing its supply chain is critical to the transition to a greener, cleaner, and more sustainable future.

GOING ELECTRIC IS JUST THE START

Currently, tailpipe emissions account for 65% to 80% of life-cycle emissions from gas-powered vehicles. As a result of automobile producers moving to electric vehicles (EVs), materials used for vehicle production will account for 60% of life cycle emissions by 2040. A recent report from Kearney shows that automakers must cut 81% of greenhouse gas emissions for EV manufacturing and supply chains by 2032 to keep at the 1.5 degrees Celsius Paris Agreement goal. This means that in addition to going electric, the auto industry must shift material supply chains to include green aluminum and steel, deforestation-free and sustainable leather, rubber, and other materials to be truly carbon neutral. Additionally, automakers must commit to responsible sourcing, especially in the pursuit of transition minerals batteries, and ensure a commitment from suppliers to respect human rights and Indigenous peoples and lands.

WHY GENERAL MOTORS?

As a global leader in the automobile industry, General Motors (GM) is uniquely positioned to set the industry standard for supply chain decarbonization and respect for human rights and the environment. In 2021, GM launched its "Everybody In" campaign to document the company's transition to electric and announced the goal to become carbon-neutral by 2040 and eliminate tailpipe emissions from new light-duty vehicles by 2035. GM also aims to create capacity for producing 1 million EVs in North America by the end of 2025 and to transition 50% of its North American and Chinese production to EVs by 2030. Additionally, in April 2022, GM invited suppliers to pledge to advance global climate action and protect human rights.

Additionally, in those limited instances where GM does produce EVs, they have prioritized larger and more carbon-intensive electric trucks and SUVs. In April 2023, GM announced it was scrapping the Chevy Bolt, the company's most popular EV. While industry experts cite the recall of 2017-2019 Chevy Bolt batteries and COVID-19 for lagging sales, in 2021, the company sold 24,827 Chevy Bolts in the U.S., up from 20,753 in 2020. While sales jumped to 38,122 units in 2022, GM decided to scuttle the Bolt to focus on larger and more carbon-intensive electric trucks and SUVs. As described by GM CEO Mary Barra, "We'll need this capacity because our trucks more than measure up to our customers' expectations, and we'll demonstrate that work and EV range are not mutually exclusive terms for Chevrolet and GMC trucks."



Digging into GM's battery electric vehicle (BEV) sales, the broader numbers being reported by GM do not accurately reflect GM's share of the North American EV market. Of the nearly 500,000 BEV sales reported by GM in 2021, almost all were attributed to China, where GM claims credit for 100% of the sales of a partnership majority owned by SAIC, a Chinese state-owned automobile manufacturer. That partnership is responsible for more than 90% of the half-million EVs GM is credited with producing. In 2021, factories operated by GM produced 3.4 million vehicles, and the company sold fewer than 30,000 EVs of its own making, for an EV percentage of 0.9%.[×]

However, despite GM's lofty ambitions, it has taken little action to meet these goals. This report will dig into other critical areas in which GM has failed to live up to its own stated ambitions in the transition to EVs, including respect for human rights and Indigenous peoples and lands. Furthermore, the report will show how GM continues to fall behind competitors like Ford, Stellantis, and Volkswagen, to name a few. As the largest carmaker in the U.S., GM is uniquely positioned to be an industry leader in the responsible transition to EVs but has consistently chosen public relations tactics over meaningful commitments to decarbonization, human rights, and respect for Indigenous peoples and lands.^{xi}

GM & LEAD THE CHARGE LEADERBOARD

GM's progress toward reducing the climate, environmental, and human rights impacts of its supply chain was recently evaluated in the Lead the Charge Leaderboard, vii published in March this year. The Leaderboard analyzed the publicly available official reporting of 18 of the world's leading automakers, ranking their efforts to build supply chains that respect human rights, protect the environment, and are 100% free from fossil fuels.

The Leaderboard evaluated these efforts along two main themes:

- 1. Climate and Environment: Assesses automakers' commitments, policies, and actions to reduce the climate and environmental impacts of their supply chains overall, and of their steel, aluminum, and battery supply chains specifically. Each area was evaluated according to three criteria: (1) disclosing supply chain climate and environmental impacts; (2) setting targets and showing evidence of progress toward achieving them; and (3) using supply chain levers to drive up standards and accelerate the decarbonization of other industries, such as through supplier mandates, offtake agreements, or investments in recycling and circular design, among others.
- 2. Human Rights and Responsible Sourcing: Evaluates automakers' human rights due diligence policies and processes, both overall and for areas of particular pertinence to EV supply chains: responsible sourcing of transition minerals, Indigenous peoples' rights, and workers' rights. Performance in these areas is evaluated across four criteria, each with several indicators: human rights commitments; measures to identify human rights risks and impacts; actions to prevent, mitigate, and account for negative human rights impacts; and grievance and remedy mechanisms for impacted rights-holders in their supply chains. The first criteria therefore evaluates whether the company has committed to respecting these rights in their supply chain, and the latter three criteria focus on whether the automaker has put in place adequate implementation processes and mechanisms to ensure that these commitments are fulfilled.



GM was ranked as an industry laggard in the Leaderboard, especially when compared to its peers in North America and Europe. It performed second-worst overall out of all the European and U.S. automakers and received the lowest score for climate and environment out of its European and U.S. competitors. Its climate and environment score tied with Toyota — widely considered the biggest climate laggard in the auto industry.

On climate and environment, although GM has set an ambitious commitment for its global operations and products to be climate neutral by 2040, the company scored just 14% for its efforts to reduce emissions and other environmental harms across its supply chain. GM has fallen behind many of its industry peers when it comes to disclosing and setting targets for its supply chain emissions. It did not disclose disaggregated emissions for its supply chain and has not set a science-based target to reduce them.

GM scored even worse when it came to taking specific actions to clean up its steel, aluminum, and battery supply chains. It received 0% for both its steel and aluminum supply chains because it disclosed no efforts to reduce the emissions from these metals or increase the rates at which they are recycled. GM's progress on cleaning up the impacts of its battery supply chain was rated a little better: It received just 6%, once again the lowest score out of all the European and U.S. automakers in the Leaderboard. It is hard to see how GM will achieve its goal of carbon neutrality by 2040 if it is failing to take aggressive action to reduce emissions from these key supply chains, which constitute an estimated 78% of an EV's embodied emissions, according to a recent report.xiii

GM performed marginally better on human rights due diligence and responsible sourcing, receiving a 25% score overall. While this is a step up from its climate and environmental score, it is still lagging behind many of its industry peers — including Ford (who scored more than double GM's score), Mercedes, Stellantis, Volkswagen, and BMW.

GM's highest score in this theme was for its overall human rights due diligence policies and processes. GM scored very high on the indicators related to commitments to respecting human rights — receiving 83% for these indicators. However, its performance notably declined when it came to the implementation indicators aimed at evaluating the actions that GM is taking to ensure these commitments are fulfilled, scoring just 25% for its measures to identify human rights risks in its supply chain and 23% for its efforts to prevent, mitigate, and account for human rights impacts.

A similar picture emerged on responsible sourcing of transition minerals: GM scored 93% for its commitments to source these minerals responsibly but just 25%, 38%, and 0% for the measures it disclosed to identify, prevent, and remedy human rights abuses in its transition mineral supply chains.

GM scored even worse for its efforts to ensure respect for the rights of Indigenous peoples and workers throughout its supply chain. Once again, it scored the highest points for its commitments to respect these rights. For Indigenous peoples' rights, it received a 60% score for the commitment indicators because GM's human rights policy and supplier code of conduct have explicit commitments on respecting the rights enshrined in the UN Declaration on the Rights of Indigenous Peoples (UNDRIP)xiv and International Labour Organization (ILO) Convention 169.xv On workers' rights, GM scored 67% for its commitment to the five Principles and Rights at Work of the ILO Declarationxvi in both its human rights policy and supplier code of conduct.



However, when it came to the indicators that evaluated the concrete processes and mechanisms needed to make these commitments a reality, GM scored extremely poorly. GM did score some points for the indicators on measures to prevent, mitigate, and account for negative impacts on the rights of workers and Indigenous Peoples in its supply chain, scoring 26% on these indicators for workers' rights and 8% for Indigenous rights. However, for the indicators on measures to identify human rights risks and remedy human rights impacts, GM scored 0% on both Indigenous rights and workers' rights.

The Leaderboard therefore paints a picture of a company that makes ambitious commitments on climate, environment, and human rights but then fails to put in place adequate policies, processes, and mechanisms to ensure that these commitments are realized. As the following sections will show, the hollowness of GM's commitments has been revealed not only in this Leaderboard but through the multiple impacts that GM's supply chain is having on people across the globe and the planet.

INDIGENOUS PEOPLES & LANDS:

THACKER PASS MINE & THE PEOPLE OF RED MOUNTAIN

Peehee Mu'huh is a sacred site on Paiute, Shoshone, and Bannock lands in northern Nevada, on the border with Oregon. It is the location of Lithium Americas' Thacker Pass lithium mine project. This landscape holds significant spiritual value to Paiute, Shoshone, and Bannock Peoples, in part, based on a history of massacres resulting in many ancestors' bodies buried in the land. The U.S. government failed to adequately consult with regional tribes and consider the cultural impacts to Indigenous Peoples resulting from the mining of this sacred site, such as an inability to maintain spiritual practices. The permitting process was rushed under a Trump administration executive order. Subsequently, the Reno-Sparks Indian Colony, Burns Paiute Tribe, a local rancher, and a number of environmental organizations sued the Bureau of Land Management on several issues resulting from inadequacies in the permitting.

General Motors announced in January 2023 that it will invest \$650 million in Lithium Americas Corp. and will help the company develop its Thacker Pass lithium mining project, with the aim of locking up a supply of lithium for its electric vehicles. However, GM's human rights policy includes commitments in conflict with this investment in the Thacker Pass mine. Two key areas of concern are GM's commitment to UNDRIPXX and to Free, Prior, and Informed Consent (FPIC). The ongoing advocacy opposed to this mine from regional tribes and the grassroots Indigenous organization, People of Red Mountain, informs concerns regarding FPIC.

Peehee Mu'huh is a Northern Paiute name that translates to "rotten moon." This name is based on the history of two massacres inflicted upon Indigenous peoples at the site. First, an inter-tribal conflict resulted in the name. During the second massacre, in September 1865, the U.S. government attempted to exterminate the region's Indigenous peoples, including the children, by attacking a camp at the base of the pass. This attack was part of a broader pattern of the federal extermination policy to open up western lands for Euro-American settlers and to promote the growth of industries, including mining. It should be understood that the ability to propose the Thacker Pass lithium mine is contingent on this massacre as a means for the U.S. government to gain control of these lands. This massacre is also linked to current advocacy for protection of the pass via Ox Sam, who escaped the 1865 massacre and rode a horse north to Disaster Peak, near the site of the



proposed Jindalee lithium mine. People of Red Mountain is a community group that includes direct descendants of Ox Sam, and it is working to protect this sacred landscape for future generations.

Federal permitting for the Thacker Pass project was fast-tracked, and the National Environmental Policy Act (NEPA) was completed in one year. Furthermore, the public components of this process took place during the height of the COVID-19 lockdowns, and as a result, much of the community was unaware of the project until after the final record of the decision was filed. Consultation with regional tribes did not extend to many communities with deep cultural ties to the region, and the mine plan of operations violated land occupancy requirements relating to claim validation. These issues were brought to the courts, and in February 2023 the United State District Court in Nevada ruled that the project was in violation of mining laws based on the precedent set in the recent Rosemont case from Arizona. However, the judge stopped short of vacating the permit, as was the case for Rosemont, and ordered the validation of certain mining claims as other aspects of mine construction were allowed to continue. This ruling is currently under appeal by the plaintiffs. Furthermore, the Burns Paiute Tribe, Reno Sparks Indian Colony, and Summit Lake Paiute Tribe filed an additional lawsuit in February 2023 focused on inadequate consultation.

The People of Red Mountain, Reno-Sparks Indian Colony, and many supporting organizations continue to advocate for the protection of this irreplaceable sacred site. GM claims certain human rights commitments to the public and its investors. The Thacker Pass mine at Peehee Mu'huh is a significant test to see if these commitments can extend beyond the theoretical to have real-world significance. It is clear that FPIC consent was not achieved due to a lack of consultation with regional tribes and public access to NEPA during the COVID-19 lockdown for the communities closest to the project. It is clear through ongoing opposition from Tribes and descendants of Ox Sam that this project violates the self-determination of Indigenous peoples. Our transition away from fossil fuels cannot be built on the same injustices of the past with Indigenous peoples, land, and lifeways sacrificed for corporate profits. To date, GM has refused multiple requests to meet with members of People of Red Mountain regarding the company's investment and opportunities to use their influence to ensure that this investment and the mining project comply with both international human rights standards and GM's own human rights commitments.**

HUMAN RIGHTS: FORCED UYGHUR LABOR & CHILD LABOR

In April 2022, GM announced a new initiative that asked global suppliers to join the company in a commitment to carbon neutrality, the development of social responsibility programs, and the implementation of sustainable procurement practices in their supply chain operations. As described by Jeff Morrison, GM vice president of Global Purchasing and Supply Chain, "There are economic and social imperatives in lowering emissions and addressing climate change while cultivating a just transition. As we accelerate toward our vision of an all-electric future, our commitment to bringing everybody along includes our global suppliers whose, collaboration is critical to promoting a sustainable, safe, and better world." Although the initiative is innovative with impressive goals, GM was tied to suppliers violating the most basic aspects of the supplier pledge even before the program was announced.

Two reports released in 2022 connected GM suppliers in the Xinjiang region of China to forced Uyghur labor. On April 8, 2022, two weeks before GM's supplier initiative was announced, Horizon Advisory released a report^{xxii} that found all aluminum producers in the Xinjiang region of China were using forced Uyghur labor. Reporting identified GM^{xxiii} as one of three auto companies associated with these suppliers. China produces more than half of primary aluminum worldwide, 90% of which



is produced with electricity from coal. The eight aluminum producers linked to forced Uyghur labor represent 17% of China's total population, xxiv and if treated as one company, the Xinjiang region would rank as the world's largest aluminum producer.

In December 2022, Sheffield Hallam University released a new report, *Driving Force: Automotive Supply Chains and Forced Labor in the Uyghur Region*, which linked GM to aluminum and steel producers connected to forced Uyghur labor. China is the world's largest steel producer, accounting for 52.9% of global steel in 2021. Over 90% of China's steel is produced using dirty coal-powered blast furnaces. In 2021, GM delivered 2.9 million vehicles in China, making it uniquely positioned to lead the transition to clean steel and aluminum by committing to only source from producers using renewable energy and free of forced Uyghur labor.

However, GM's lack of respect for human rights is not limited to forced Uyghur labor in the Xinjiang region of China. Reporting from The New York Times in February 2023 connected GM parts suppliers in the U.S. to undocumented child laborers. As noted by the article, auto parts made in Michigan from these children were used in Ford and GM cars, with some children working until 6:30 a.m. and skipping school to sleep in order to continue working to provide for their families. GM said it took the allegations seriously and would investigate, but from Thacker Pass to the Xinjiang region of China to the undocumented child laborers in Michigan, whatever system GM claims to have is clearly failing.

DIRTY STEEL & ALUMINUM

Steel accounts for 8% of GHG emissions annually, and automakers consume 12% of global steel yearly. To meet climate goals, steel emissions intensity will need to drop 93-100% by 2050.*** Global steel demand is projected to grow 30% by 2050, and to meet the increased demand and stay on a trajectory to net zero by 2050, the world needs 70 new green steel plants by 2030.*** Surging demand for green steel in the automotive industry is expected to drive the green steel market from 2025 to 2030, making auto companies a key driver in the push to decarbonize the steel industry.

Additionally, as the auto industry transitions to lighter EVs, demand for aluminum will double by 2050,**xxi and a recent study of automakers and Tier 1 suppliers by Ducker Carlisle projects an aluminum content increase of nearly 100 net pounds per vehicle from 2020 to 2030.**xxii The aluminum sector is responsible for 1.1 billion tons of carbon dioxide pollution per year, about 2% of global emissions.**xxiii Car manufacturers accounted for 18% of all aluminum consumed worldwide in 2019;**xxiv as such, they have an important role in driving decarbonization.

Beyond being connected to steel and aluminum suppliers linked to forced Uyghur labor, GM has yet to announce how it intends to decarbonize its North American steel and aluminum supply chains. While GM recently announced joining the First Movers Coalition (FMC), a public-private partnership launched by the World Economic Forum, the commitments offered are lacking. **XXXXY** As a member of FMC, GM committed to purchasing at least 10% near-zero carbon cement, steel, and aluminum by 2030. However, as noted in the 2023 report from Kearney, it is estimated that 43% of the embodied emissions from an EV will come from steel and aluminum. **XXXXY** As GM intends to be carbon neutral by 2040, the FMC target of 10% net-zero purchasing commitments by 2030 is simply not in line with the massive scale-up needed in the procurement of low-carbon steel and aluminum to meet that goal.



While GM has made no announcement on a low-carbon aluminum purchasing agreement with any supplier, in February 2023, U.S. Steel announced it will supply GM with its advanced and sustainable steel solution, called verdeX® steel, manufactured with up to 75% less emissions compared to traditional blast furnace production and made with up to 90% recycled content.**XXXVIII And in June of 2023, ArcelorMittal announced it would supply GM with Xcarb recycled and renewably produced steel.**XXXXVIII However, GM did not release the size of the buys or which models would be using the new low-carbon steel, making it impossible to know how much these agreements help to reach its FMC commitment.

While the recent report of low-carbon steel agreements is promising, GM continues to show its lack of commitment to steel decarbonization with the announcement of Cleveland-Cliffs as a 2022 "Supplier of the Year." Just this April, Cleveland-Cliffs announced it plans to reline a blast furnace at its facility in Burns Harbor, Indiana, in 2025. Blast furnace relining is incompatible with a climate-safe future and represents a major economic and climate decision that will extend the life of a blast furnace-powered plant for an estimated 18 years. If Cleveland-Cliffs relines the blast furnace at Burns Harbor, it would release 68 million tons of CO2 equivalent over its lifetime, equivalent to operating an additional coal plant every year for 18 years. In addition to climate pollution, Cleveland-Cliffs' Burns Harbor and Indiana Harbor steel plants are the highest industrial emitters of health-harming pollutants like nitrogen oxides, sulfur dioxide, and particulate matter in the state of Indiana.

Simply put, GM's continued relationship with Cleveland-Cliffs is antithetical to its decarbonization commitments, and the company continues to pollute communities near its facilities. In fact, in 2023 Cleveland-Cliffs agreed to pay \$3 million in penalties for spilling cyanide and ammonia in Lake Michigan, XXXXIX GM's backyard, and as recently as 2021, groups including the Sierra Club and Environment Michigan filed notice to sue Cleveland-Cliffs over "blatant disregard" for the state and federal laws and emissions rules at its plant in Dearborn, Michigan, XII a community known as Michigan's most "toxic" zip code, XIII which is just down the road from GM's headquarters. While GM could be excused as misguided for one Supplier of the Year award, it's given Cleveland-Cliffs this award for six consecutive years. As such, it is hard to accept GM's commitment to decarbonizing its steel supply chain. XIII It also does not bode well for GM's commitment to finding steel and aluminum suppliers committed to the environment and the communities they serve.

CONCLUSION

During Super Bowl LVII, GM rolled out a new television ad campaign featuring famed comedian Will Ferrell aimed at getting "Everybody In" on the transition to EVs and the goal of being carbon neutral by 2040.xiiii However, there is nothing funny about GM's "Everybody In" campaign and how the company has blatantly greenwashed its lack of action on its commitment to the environmental and human rights principles it has pushed to potential consumers. As noted earlier in the discussion of the Lead the Charge Leaderboard, GM performed second-worst overall compared to its European and U.S. competitors. Even more telling, GM received the lowest score for climate and environment compared to European and U.S. automakers. Additionally, while GM has a human rights policy, from the Thacker Mine investment to being linked to suppliers using forced Uyghur labor in China, it's clear that implementation has not been a priority.

Beyond the ethical reasons for GM to take its environmental and human rights commitments seriously, GM has a fiscal responsibility to its shareholders. And the shareholders are watching. Ahead of GM's annual general meeting, a shareholder resolution has been filed calling on GM to



take concrete steps to address supply chain emissions to align with the Paris Agreement to limit global temperature rise to 1.5 degrees Celsius.xiiv As noted in the filing:

GM envisions a world with zero crashes, zero emissions, and zero congestion and indicates that it would like to bring "Everybody In' for the all-electric future with a commitment to establishing a collaborative supply chain that endeavors to minimize environmental impact and enhance long-term sustainability." However, GM has not realized its aspiration. Despite establishing meaningful targets for its operational emissions and a portion of its customers' emissions, GM has not adequately disclosed or addressed its supply chain emissions, particularly from steel, aluminum, rubber, and leather. Further, it has yet to set a zero-deforestation target. The physical impacts of climate change have the potential to disrupt GM's supply chains, operations, and vehicle sales. Emissions mitigation is therefore critical, and investors have indicated that disclosure of companies' climate risks facilitate[s] understanding what capital outlays may be required in the future, how unmitigated climate risk may adversely impact a company's ability to operate its business, and whether companies' internal strategies adequately address these risks.*

It is clear from the investor proposal that shareholders are aware other automakers are moving faster than GM to address supply chain decarbonization. As noted in the filing on the Lead the Charge Leaderboard for steel, GM scored behind BMW, Geely, Hyundai, Mercedes, Renault, Volkswagen, and Volvo, and for aluminum, the company was outscored by Ford, Hyundai, Nissan, Renault, Stellantis and Volkswagen. Additionally, the filing highlights that Mercedes and Volvo have joined ResponsibleSteel, a global not-for-profit steel standard and certification initiative aimed at being a driving force in the socially and environmentally responsible production of net-zero steel.xivi The filing also notes that Volvo has joined SteelZero, a global initiative that aims to speed up the transition to a net-zero steel industry, and has committed to 50% low-emission steel by 2030.xivii

This report shows that there is a massive disconnect between what GM says and what GM actually does in regard to its environmental and human rights commitments. If GM truly wants "Everybody In" on its transition to EVs and its carbon-neutrality goals, it's time to stop the greenwashing and become a true leader in the auto industry. While other automakers are making real progress to uphold environmental and human rights commitments, GM has made minimal, if any, real progress to achieve the company's lofty goals. As such, Mighty Earth is calling on GM to:

- Pause investment in the Thacker Pass Mine to conduct due diligence on their Indigenous Rights risk exposure in the project. Require suppliers and partners to implement FPIC policies in accordance with UNDRIP.
- If Lithium Americas is unable to respect FPIC, as enumerated in UNDRIP, rescind GM's investment from the Thacker Pass Mine.
- Adopt specific annual targets for purchases of carbon-free aluminum, reaching zerocarbon aluminum emissions by 2030.
- Commit to transition to using 50% low-carbon steel by 2030.



- Join global initiatives supporting value chain emission reductions, including ResponsibleSteel, SteelZero, and the Aluminum Stewardship Initiative.
- Commit to ending sourcing from any steel, aluminum, and mining company connected to human rights violations or the exploitation of Indigenous peoples and lands.
- Develop a public plan to assess human rights risks regularly across supply chains, including at the mining, refining, and smelting levels.
- Publicly disclose information regarding its steel, aluminum, and battery mineral supply chains, including mines, refineries, and smelters.
- Commit to supporting manufacturers with strong labor standards to help grow domestic manufacturing of clean technology parts and materials.
- Commit to an equitable transition to EV production for U.S. workers, including the reshoring of EV manufacturing jobs.
- Announce a plan with power suppliers to source, by 2035, 100% renewable energy to meet GM's global electricity needs.



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