

# SETTING UP A EUROPEAN SUSTAINABILITY FRAMEWORK FOR THE EXTRACTIVE INDUSTRIES



## CAPACITY-BUILDING SURVEY RESULTS

Briefing document

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## SUMEX CONSORTIUM



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# 1 SUMEX PROJECT BACKGROUND

SUMEX is a 36-month project funded by the EC that started on 01.11.2020. The project supports the set-up of a European sustainability framework to improve the permitting procedure along the extractive value chain (prospecting, exploration, extraction, processing, closure, post-closure activities), to guarantee timely decisions, a transparent governmental regulatory regime, appealing financial and administrative conditions and sustainable natural environmental and social conditions. The main mission of SUMEX is to assist policymakers and other stakeholders in seizing this opportunity.

To foster more but sustainable mineral production in the EU, SUMEX (*SU*stainable *M*anagement in *EX*tractive industries) establishes a sustainability framework for the extractive industry in Europe. It does so by considering the Sustainable Development Goals, the European Green Deal, as well as EU Social License to Operate (SLO) considerations and involves stakeholders from industry, government, academia and civil society backgrounds from all across the EU.

This framework is then applied across the extractive value chain to analyse the mineral, as well as relevant economic, environmental and social policy frameworks of the EU, Member States and selected regions along five focus areas – socio-economic and environmental impact assessments, land use planning, health and safety, reporting official statistics and permitting processes/policy integration-to find, or build where needed, good practices or tools for an open access toolkit, which will be embedded in a broader Community of Practice (CoP) and which forms the basis for capacity building. This CoP will consider relevant stakeholder groups, with a focus on permitting authorities, across the EU, providing a digital platform and using a series of workshops and webinars. In SUMEX, the experience from other projects builds a powerful foundation for addressing the challenge of how best to implement sustainability considerations into the whole raw materials value chain.

## **Challenge: No common understanding of sustainable management in extractive industries**

SUMEX supports the set-up of a European sustainability framework to improve the permitting procedure along the extractive value chain (prospecting, exploration, extraction, processing, closure, post closure activities), to guarantee timely decisions, a transparent governmental regulatory regime, appealing financial and administrative conditions and sustainable natural environmental and social conditions. The main mission of SUMEX is to assist policymakers and other stakeholders in seizing this opportunity.

## **Objectives of SUMEX**

- Strengthen policy coordination and agenda setting along the mineral extraction value chain;
- Propose a uniform EU sustainable management in extractive industries context;
- Cluster with other projects to identify good practices and good-practice principles;
- Identify good practices and principles for policy strategies and strategic approaches, coordination/integration and approaches and property rights regimes for different institutional systems;
- Build a toolkit with good practices, with a focus on access to land, permitting and policy coordination and integration;
- Identify stakeholder learning needs and requirements; and
- Deploy an open-access toolkit for capacity building across EU and with all stakeholders.

## **More info:**

[www.sumexproject.eu](http://www.sumexproject.eu) - Follow us [@sumexproject](https://twitter.com/sumexproject)

## 2 SURVEY GOALS

Providing the foundation for addressing SUMEX’s aim to foster networking and capacity-building in sustainable management for the extractive industries, a survey was developed to identify where specific knowledge gaps exist in the field of sustainable extraction. For this, actors from the extractive industries, civil society and policy and permitting authorities were requested to share their specific needs for knowledge transfer in certain aspects relevant to their work.

The survey results should be able to reflect these stakeholders’ diverse capacity-building needs as they intersect with three broad categories of themes that are illustrated on the faces of the SUMEX project cube at right (**Figure 1**): the five SUMEX focus areas (front face), the extractive value chain (right side), and four specific sustainability framework aspects (top).

The SUMEX focus areas consider socio-economic and environmental impact assessments, land-use planning, health & safety, data reporting, and permitting. These focus areas can be considered within the stages of extraction, which are divided here (right side) into pre-exploration/ exploration, operation, and closure/ post-closure. SUMEX concentrates its efforts on the four sustainability framework issues social, environmental, economic, and mineral.

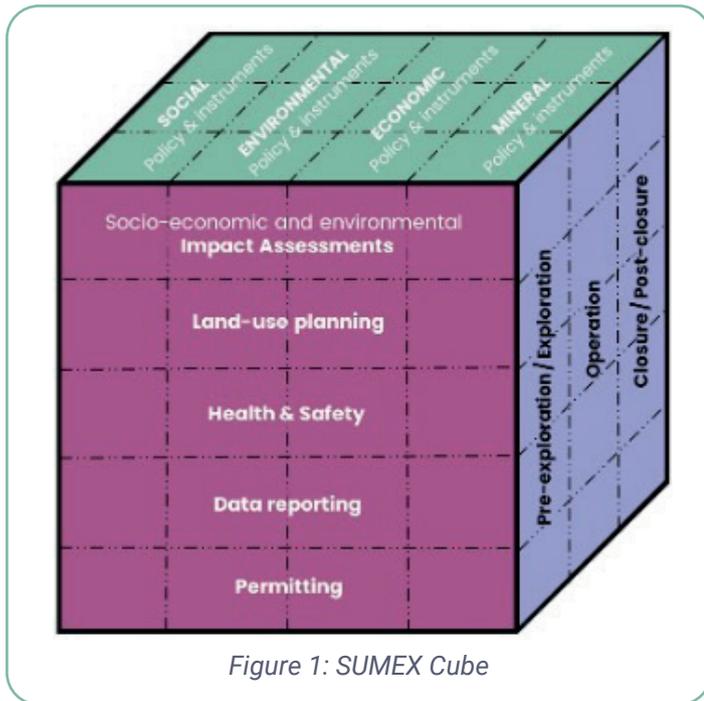


Figure 1: SUMEX Cube

The results from this survey should mirror the diverse needs and opportunities across the EU, which are related to the particular capacities in different countries and regions. Incorporating this capacity-building survey results into subsequent SUMEX activities and research empowers the views and experiences that participants have shared to support the outcome of certain aspects of the SUMEX project. Survey participants can feel confident that their responses provide a meaningful contribution to promoting improved sustainable mineral production in the EU.

## 3 KEY RESULTS FROM SURVEY

In total, **99 survey responses** were received in 11 different languages. This represents over 20 countries and all categories of stakeholder groups. Over two thirds of responses were received from four specific countries – Spain, Estonia, Austria and Portugal – as can be seen in **Figure 2** below.

While differences in capacity-building needs may exist between the different countries and broader regions, the survey was not judged representative enough of all regions to draw conclusions based on geography.

Stakeholders from the extractives & extractives-related industries submitted about half of the received responses, and research & academia submitted approximately one third (see **Figure 3** below). The remaining 19 % of responses represent stakeholders from permitting authorities, civil society and policy representatives. The nine permitting authority representatives participating

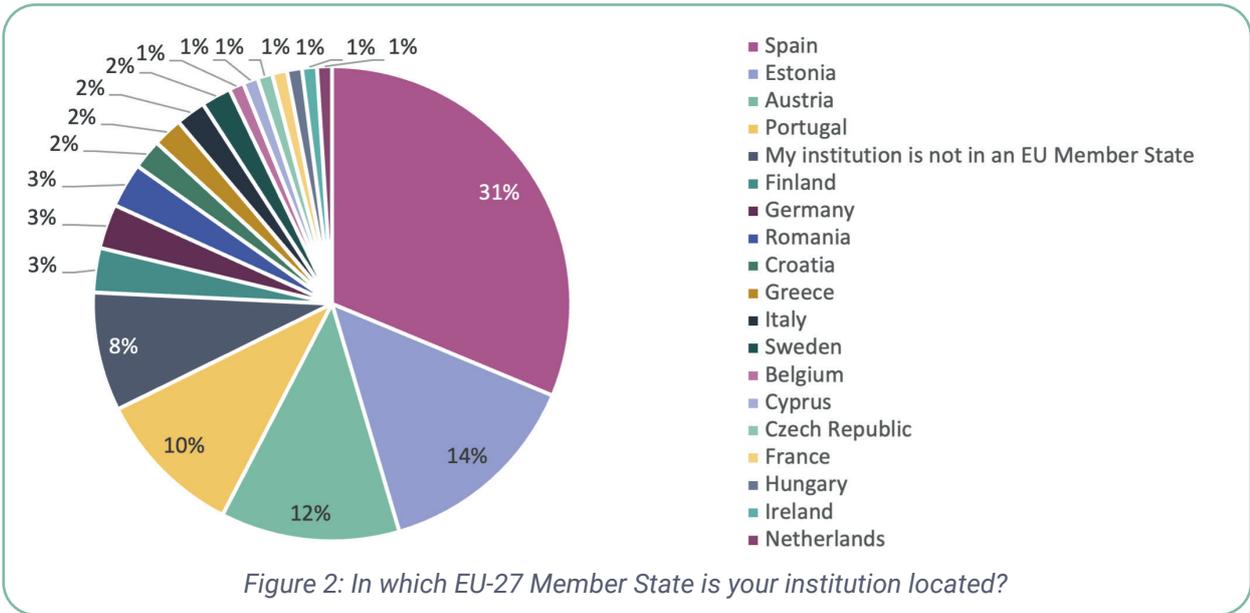


Figure 2: In which EU-27 Member State is your institution located?

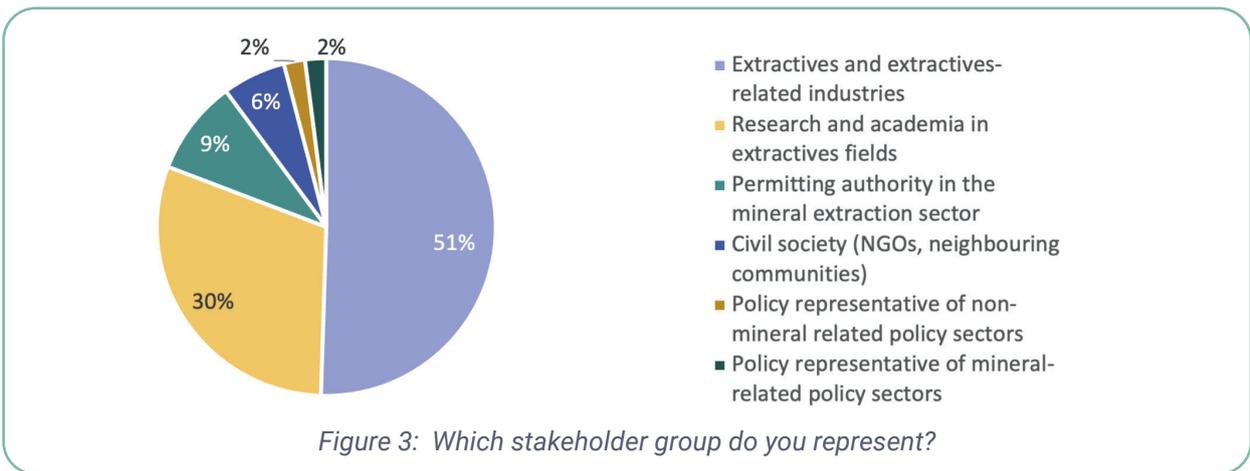


Figure 3: Which stakeholder group do you represent?

The key results from the survey’s content questions, in particular how they relate to the different regional/ national and stakeholder groups, are discussed below.

### 3.1 CAPACITY-BUILDING NEEDS EXIST IN ALL EXTRACTION STAGES

**Capacity-building is generally seen to be necessary in all three extraction stages:** pre-exploration/ exploration, operation and closure/ post-closure (see the red highlighted bars in **Figure 4** below). However, when looking at the specific stakeholder groups in **Figure 5** below, permitting authorities particularly see a need for capacity building related to the closure and post-closure extraction stages. In contrast, civil society and policy representatives see a need for capacity building at the front end of the extraction stages in pre-exploration/ exploration.

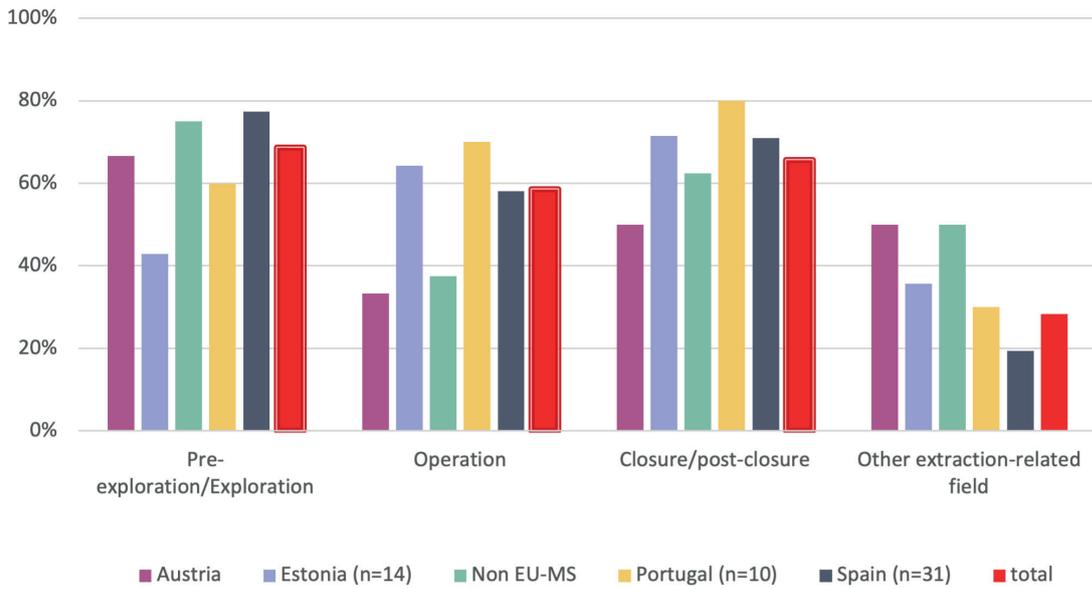


Figure 4: In your field of work within the extractives industry, in which stage(s) of development is capacity building needed? (More than one response is possible.) – % per geographic group

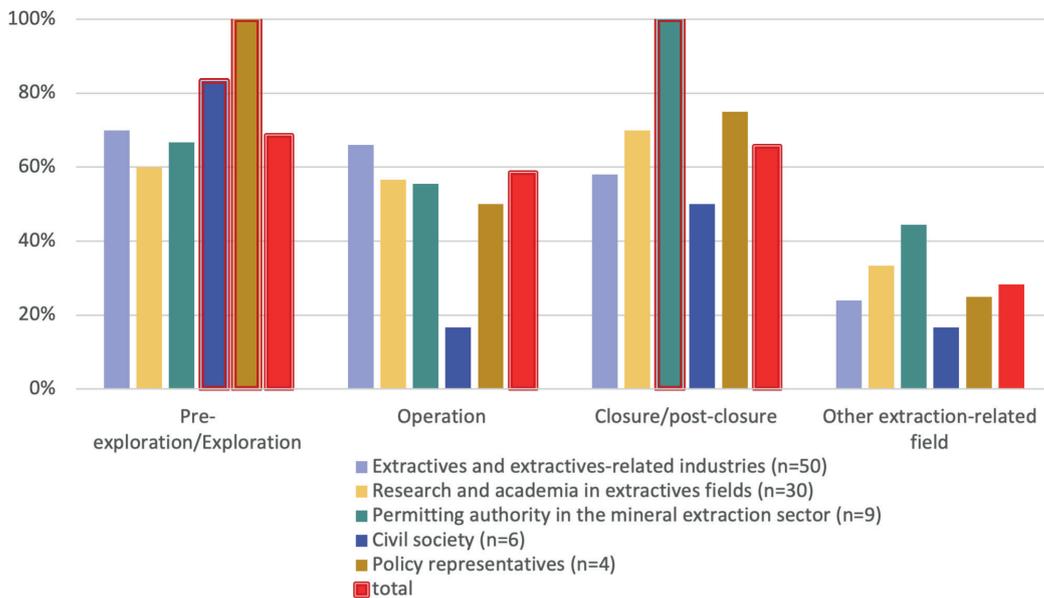


Figure 5: In your field of work within the extractives industry, in which stage(s) of development is capacity building needed? (More than one response is possible.) – % per stakeholder group

### 3.2 'PERMITTING PROCESSES AND POLICY INTEGRATION' SHOULD BE INCLUDED IN MORE CAPACITY-BUILDING INITIATIVES

The aggregated response from all participants suggests that the SUMEX focus area 'Permitting processes and policy integration' is where most capacity building is needed (see **Figure 6** below). Permitting authorities themselves would also appreciate more learning and exchange activities in

this area. Only stakeholders from research and academia saw instead a greater need for capacity building not in 'Permitting' but in 'Socio-economic and environmental impact assessments'.

In contrast, the focus areas 'Health and safety' and 'Data reporting' generally had a comparatively reduced need for capacity building. It is assumed that, in these areas, a high level of know-how and informational material already exists, and most stakeholders feel confident in their understanding or access to information. Nevertheless, in all focus areas, at least one quarter of all respondents still see a need for capacity building.

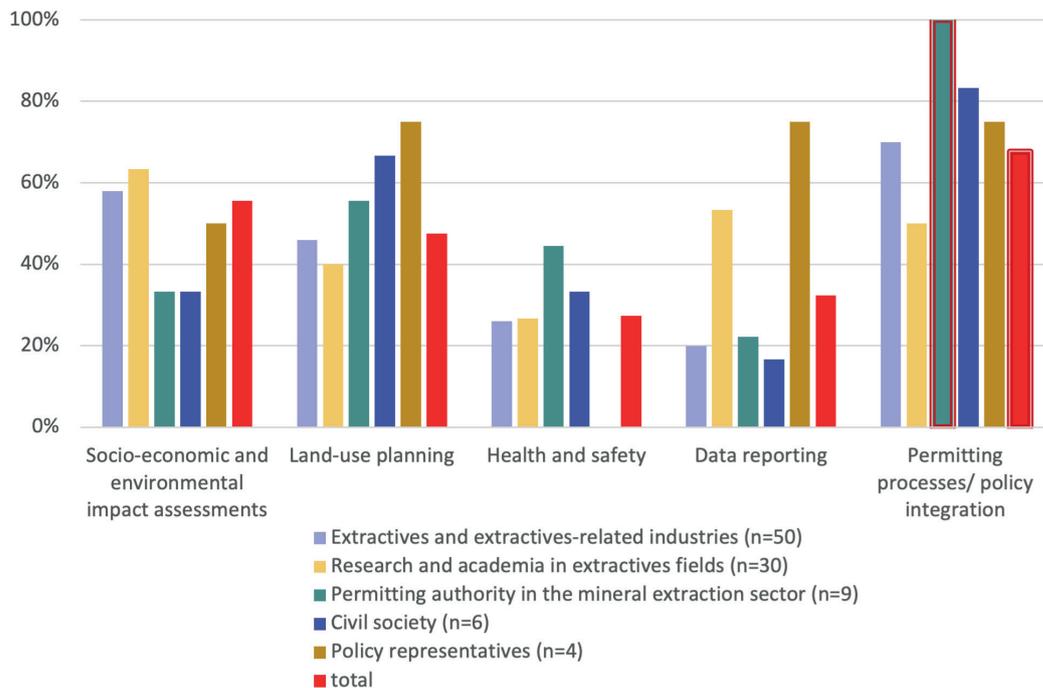


Figure 6: In your daily working routine, in which SUMEX focus area would you personally most benefit from learning and exchange activities with other practitioners? (More than one answer possible.) -- % per stakeholder group

### 3.3 ALL THREE SUSTAINABILITY PILLARS ARE A MONTHLY PART OF WORK FOR AT LEAST 60 % OF RESPONDENTS

The relevance of the three pillars of sustainability – environmental sustainability, social and societal responsibility, Transforming the economy – is rather evenly distributed across their frequencies of use in regular work (see **Figure 7** below). The pillar 'Environmental sustainability' is generally a more frequent aspect of respondents' work, with nearly 30 % including it daily and half including it at least weekly. In contrast, 'Social and societal responsibility' is included in daily work for just 16 % of respondents.

**On a monthly basis, participants' work includes aspects of all three pillars for at least 60 % of respondents.** However, for a significant portion of participants (12 %), neither of the pillars 'Social and societal responsibility' and 'Transforming the economy' are ever included in work.

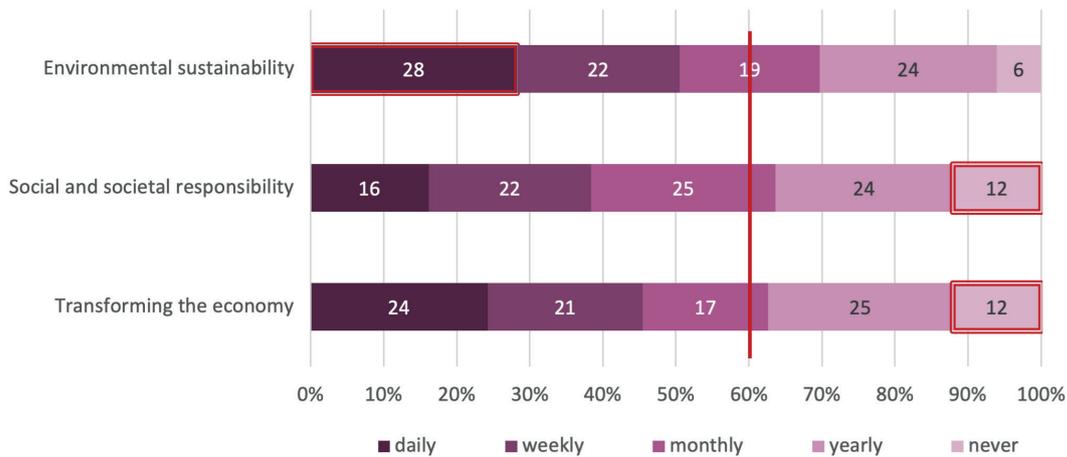


Figure 7: How frequently are the following aspects a part of your work? (values indicate response count)

### 3.4 DO PERMITTING AUTHORITIES HAVE THE MOST POWER TO INFLUENCE THE IMPROVEMENT OF SUSTAINABILITY?

As can be seen in **Figure 8** below, survey respondents indicated that they felt that the four specified stakeholder groups all have at least some power to influence the improvement of sustainability in the extractive industries, with over 70 % of respondents seeing the groups ‘Permitting authorities’, ‘Policy representatives’ and ‘Industry’ as having significant power. On the other end of the spectrum, ‘Civil society’ groups were rated as having a non-dominant influence over the extractive industries. Very few respondents indicated that any of the stakeholder groups have no influential power over extractives to improve.

**Permitting authorities were seen by survey participants to have the most dominant power.** It should be noted that, in supplementary interviews to the survey, the power of permitting authorities was instead described as being low because permitting authorities’ tasks are to simply enact the political decisions already made. Such a correlation is reflected in the survey responses: Having strong power – ‘dominant’ and ‘significant’ power combined – was rated rather equally for the stakeholder groups ‘Policy representatives’ and ‘Permitting authorities’.

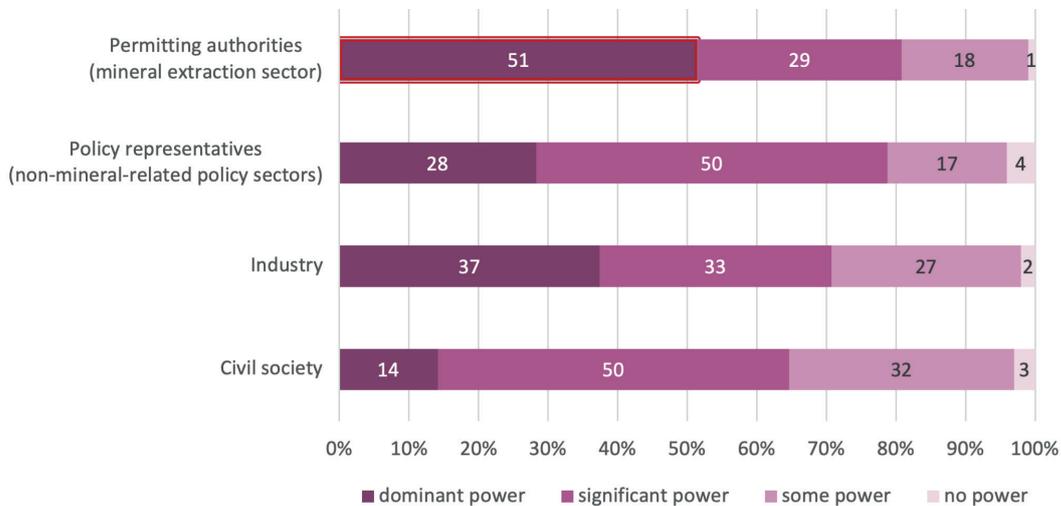
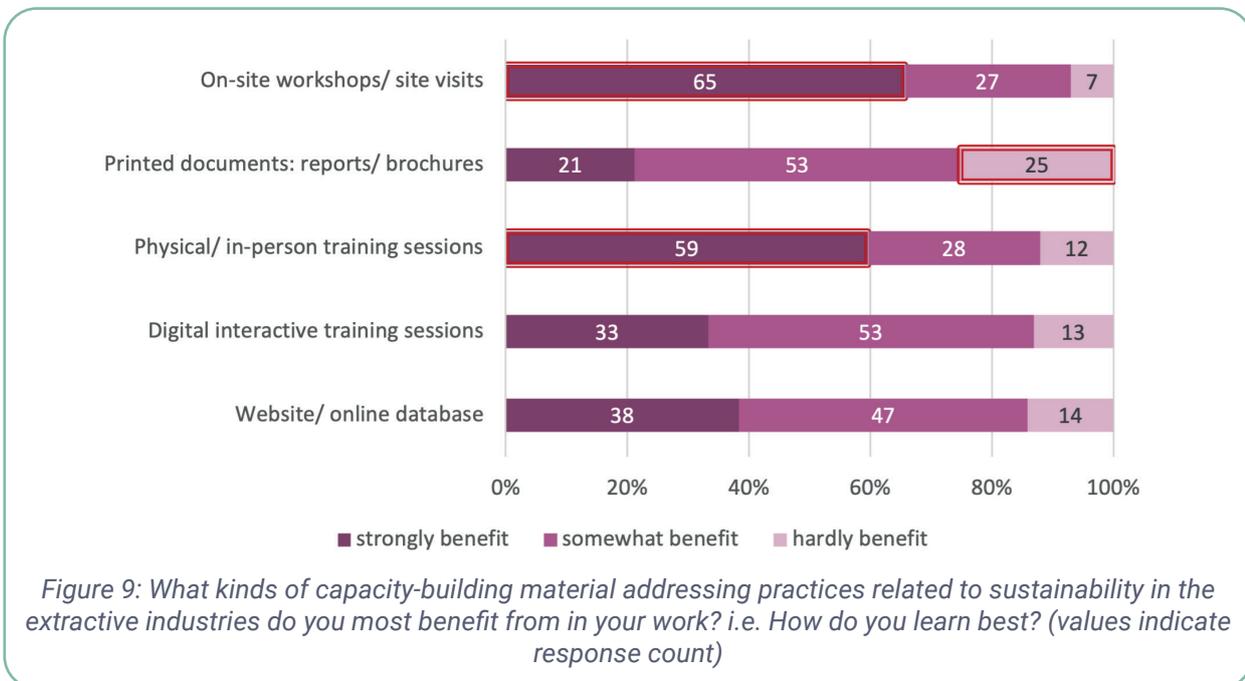


Figure 8: In your opinion, how much power do the following stakeholder groups have to influence the improvement of sustainability in the extractive industries? – responses from all participants (values indicate response count)

### 3.5 PEOPLE BENEFIT MOST FROM SITE VISITS AND IN-PERSON TRAINING SESSIONS

Responses to how participants learn best, i.e. which capacity-building material they most benefit from, confirm the general impression that **face-to-face capacity-building activities** are most valuable for allowing knowledge exchange. According to survey results, ‘on-site workshops/ site visits’ and ‘in-person training sessions’ were seen by the majority of respondents as highly conducive to capacity building; supporting this, such in-person visits had the fewest responses that there was little benefit gained (see **Figure 9** below).

As well, some and strong learning and capacity-building benefits were reported coming out of digital interactive training sessions and through websites or online databases. This goes along with the responses showing that, for one in four respondents, printed documents offer hardly any capacity-building benefits.



### 3.6 CAPACITY-BUILDING MATERIALS ARE NEEDED IN LANGUAGES OTHER THAN ENGLISH

Survey participants indicated that learning and capacity-building **materials in languages other than English** would be necessary for themselves or the people they work with (see **Figure 10** below). While 42 % of all participants found a need for non-English materials, more than half of stakeholders that were not from research & academia found that English-language materials would not be sufficient. Moreover, two thirds (67 %) of the group of permitting authorities indicated a need for materials in languages other than English.

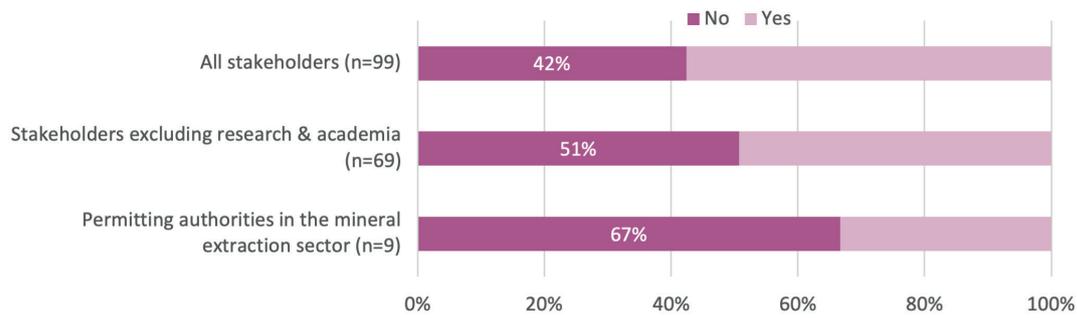


Figure 10: Would capacity-building material in English be sufficient for you and the people with whom you work?

The proportion of respondents completing the surveys in languages other than English is also remarkable. As **Figure 11** below indicates, over 80 % of participants responded in non-English languages such as Estonian, Spanish, Hungarian, German, etc. These responses support the SUMEX project’s suspicion from previous project surveys that it is **important to connect with extractives field stakeholders in a language that they are comfortable using**.

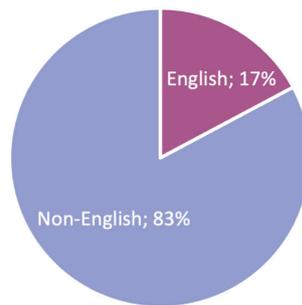


Figure 11: Survey language used: English and non-English responses

## 4 SURVEY METHODOLOGY

### 4.1 SURVEY DEVELOPMENT

The SUMEX team developed a multiple-choice survey in English to support investigations on the capacity-building needs of stakeholders in the extractives fields. To ease access to the survey for a diverse stakeholder group, the finalised version of the survey was machine translated from English into 22 of the official European Union languages (excluding Irish and Maltese). Many of the survey translations were thereafter proofread and checked for accuracy by native speakers within the SUMEX consortium or the SUMEX Advisory Board before being made available online. All survey translations included a link to a PDF version of the English survey, in case of misunderstandings. This method to offer the survey in as many EU languages as possible was seen to be the most efficient and cost-effective to reach a diverse group of stakeholders and allow accurate evaluation of the results.

Each language version of the multiple-choice survey was made into a separate MS FORMS digital survey and published through an individual survey link.

To participate in the survey, participants were informed in English of their GDPR rights, including how participation, responses and collected data are handled within the SUMEX project according to GPPR principles. Participants were requested to indicate agreement to the GDPR statements

presented in two documents tailored to the survey: a) Participant Information Sheet and b) Informed Consent Form.

## **4.2 SURVEY DISSEMINATION**

### **4.2.1 Stakeholders and invitation**

The publicly available survey, including all translations, was opened and disseminated in an English-language email invitation sent to selected stakeholders. Others interested in participating in the survey could access the survey translations through the SUMEX project website.

The English survey invitation email was sent to the following mailing lists:

- people registered for the SUMEX newsletter;
- people who had expressed interest in SUMEX around the project kick-off (Nov 2020) but who were not registered for SUMEX;
- the EFG members;
- other individual contacts to the SUMEX Consortium.

SUMEX project consortium members and third linked parties were also requested to forward the survey, with perhaps a brief introduction in their local languages, to any contacts that may have useful input. For example, German land-use and permitting authorities were directly contacted in German using publicly available contact information.

### **4.2.2 Survey access webpages and general dissemination channels**

The survey and explanatory information was open to the general public on the SUMEX website with direct links to the MS FORMS survey language versions. As well, selected stakeholders could access the survey language versions from a weblink sent in the invitation email. The survey was also disseminated through the SUMEX news ticker at the bottom of the SUMEX homepage and on the SUMEX project's News page, as well as with other social media channels such as Twitter, LinkedIn and Facebook.

### **4.2.3 Survey duration**

On 23 September 2021, all survey language versions were opened for access. In parallel, SUMEX news announcements were published and sent personally to potential participants, as described above. The contacts were asked to complete the survey within approximately two weeks (23 September 2021 – 8 October 2021).

The survey window was further extended on 7 October for an additional two weeks, with social media and email reminders asking for participation. The survey was closed on 22 October 2021.



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