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Aligning EU cooperation with resource-rich developing and emerging countries' needs – key elements for creating win-win partnerships and a strategy for sustainable mineral supply

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STRADE is an EU-funded research project focusing on the development of dialogue-based, innovative policy recommendations for a European strategy on future raw materials supplies. In a series of policy briefs and reports, the project will offer critical analysis and recommendations on EU raw materials policy.

This policy brief analyses European resources policies and minerals policies of important developing and emerging raw material suppliers to the EU in order to develop recommendations for future resource-related cooperation topics and instruments.

1. Introduction

The European Union (EU)'s cooperation with resource-rich developing and emerging countries in the raw materials sector has, up to now, focused on contingency support – through the System of Stabilization of Export Earnings from Mining Products (SYSMIN) and the Fluctuations in Exchange Earnings (FLEX) programme – from the 1980s until 2011 and, starting in the 2000s, capacity building (through National Indicative Programmes (NIP) and funding partner organisations)¹. With the launch of the Raw Materials Initiative (RMI)² in 2008, emphasis was put on the promotion of undistorted access to markets through raw materials diplomacy, including support for good governance and further capacity building, especially in the fields of geological knowledge, fiscal and mining contract management. This, together with the provision of financing instruments, also aims at promoting investment. The European Innovation Partnership (EIP) on Raw Materials^{3 4} from 2012 adds the promotion of environmentally friendly extraction and processing technologies, health and safety standards, supply chain due diligence and related best practices in developing countries.

In order to secure mineral supply to the EU without strong price volatility in the long term, the current strategy needs to be adapted. Three major conclusions can be derived from past experiences in the EU's (incl. individual member states) cooperation with developing and emerging countries on raw materials. These conclusions become even more apparent, when compared to third countries' activities in this field^{1 5 6}:

- 1) The need for clear coherent "overarching principles" in the cooperation;
- 2) The need to move on from fractured studies to focused project implementation with visible results;
- 3) The need to take the partner countries' agendas into account and create win-win relationships.

This policy brief aims at presenting resource-rich developing and emerging countries' perspectives regarding the development of their minerals and mining sectors and their economic development based on the sector as derived from their mineral policies. Acknowledging that there are often some gaps between policy aspirations and actual measures, this brief should be understood as a starting point. Conclusions and preliminary recommendations derived from the policy analysis will be discussed, verified and adapted in a dialogue process with representatives from resource-rich developing and emerging countries during the course of the project and finalized in a forthcoming report.

The policy brief will start by presenting the analysis of the EU-internal alignment of strategies for the cooperation with resource-rich developing and emerging countries (chapter 2) – namely of different EU institutions' roles and approaches (2.1) and of the EU's and member states' resources policies (2.2). It will shed some light

on the Policy Coherence for Development (PCD) concept and the RMI's compliance with the PCD's requirements (2.3). Thereafter, the brief will analyse selected developing and emerging countries' mineral policies with the aim to understand their perspectives and main objectives (3). Subsequently, the European policies will be compared to the analysed African, Asian and Latin American policies (4) in order to define priority topics for cooperation projects and possible instruments (4.1). A brief insight into the perception of European resource policies in partner countries will be provided (4.2), before drawing conclusions (5).

2. Internal alignment of cooperation strategies

2.1 Harmonisation of different EU agencies' external policies

The RMI calls for “better and more effective coordination and coherence among EU external policies (external relations, trade, and development)”.² Considering that the raw materials related cooperation with developing and emerging countries involves a whole range of thematic areas, such as industry, trade, development cooperation, diplomatic relations, finance etc., it is not surprising that numerous EU institutions are involved.

The six institutions directly involved are: The Directorate General for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW), the European External Action Service (EEAS), the Directorate General for Trade (DG TRADE), the Directorate General for International Cooperation and Development (DG DEVCO), the European Investment Bank (EIB), and the European Parliament (EP). Additionally, the Directorate General Environment and the Directorate General Research & Innovation are indirectly involved. The Foreign Affairs Council is also involved through the EEAS. Each of these institutions has a different mandate and interests and hence their cooperation strategies with resource-rich developing and emerging countries vary.

The harmonization of all these different strategies seems a difficult task. Looking at the debate on harmonization (and its limitations) of EU development cooperation policy^{7 8 9}, which only involves two major actors, DG DEVCO and EEAS, and the EP, DG Environment and EIB in minor roles, gives a good indication on the complexity of the issue.

This complexity increases even more, when one considers that, firstly, there are also numerous institutions involved at partner country level (local, national, regional, supra-national organisations and departments). Secondly, a considerable portion of the EU's and member states' funding for development cooperation, including in the minerals and mining sector, is channeled through multinational and intergovernmental organisations, which also have their own agendas and strategies. However, a detailed discussion of these issues is beyond the scope of this brief.

2.2 Coordination of EU member states' cooperation strategies

The EC Communication on European Innovation Partnership (EIP) on Raw Materials³ recognizes that there is “insufficient co-operation between Member States in different domains related to raw materials”¹⁰.

A topic, which has been discussed in more detail, is the EU's and member states' coordination in development cooperation. The European Commission (EC) drafted the “EU Code of Conduct on Division of Labour in Development Policy”¹¹, calling on EU donors to implement in-country, cross-country and cross-sector complementarity. This means, EU donors should better coordinate their actions and complement each other, with each donor focusing on limited key sectors of expertise in the cooperation with any given country and regional institution and concentrating on a limited number of countries (preferably those that are generally less served by donors), while ensuring EU presence in all strategic sectors. The initiative aims to “increase aid effectiveness, strengthen the role of development co-operation in EU external relations and contribute to the construction of a European identity”¹² The European Union OECD DAC Peer Review from 2012, however, states that the expectations of the above mentioned code of conduct are not met, supposedly due to the limited leverage of the EC in the politically sovereign member states¹³.

Figure 1 below summarises the main objectives, priority fields and instruments for cooperation with resource-rich developing and emerging countries as stated in the EU's and individual member states' raw materials policies and related initiatives.ⁱ

ⁱ The analysis includes all European countries having a raw materials/ minerals/ resources policy or strategy specifically addressing the cooperation with developing (and emerging) countries. Austria and Poland are included although their

EU resource policies: goals, priorities & instruments for cooperation with resource-rich developing and emerging countries and access to raw materials

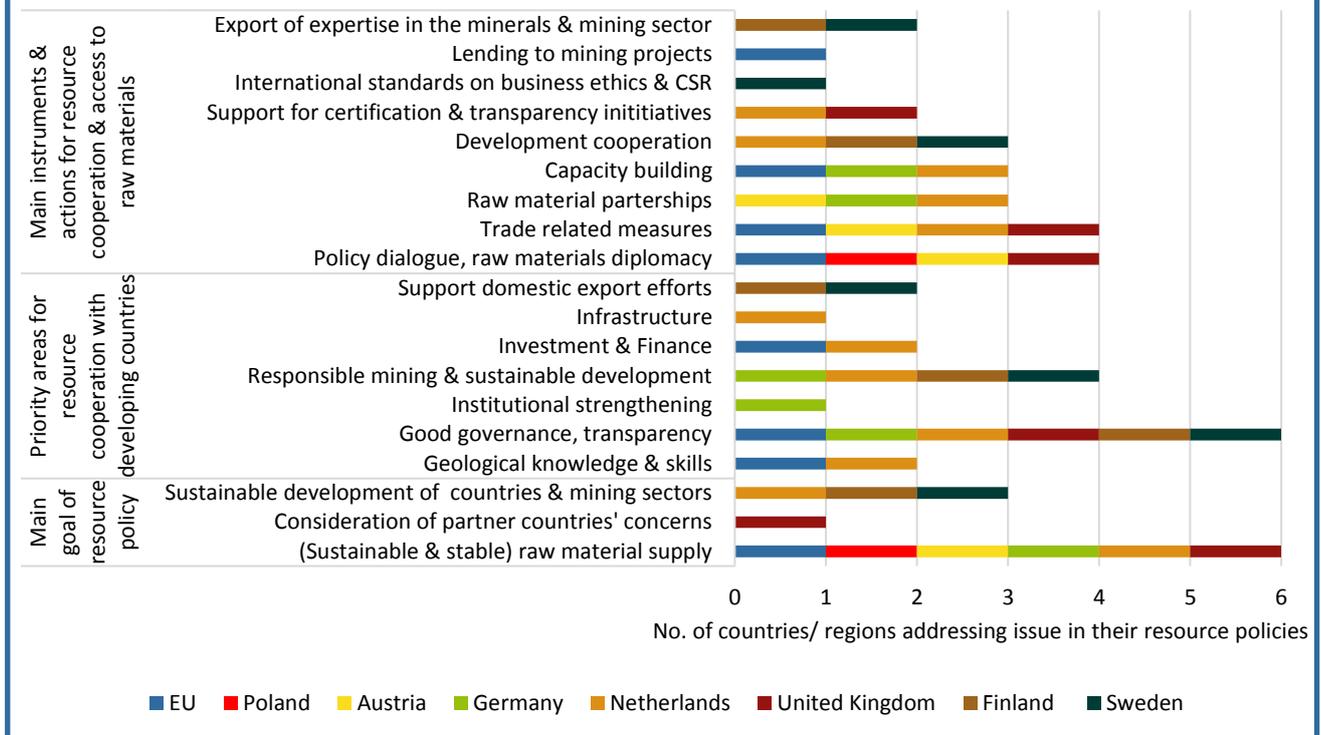


Figure 1: Summary of EU resource policies. Source: own analysis based on countries' resource policies¹⁴.

Figure 1 shows that objectives and priorities for resource related cooperation differ from one European country to the other. The EU's main concern is access to raw materials. A similar pattern can be found in its member states Poland, Austria and Germany. The Netherlands and the United Kingdom (UK) also name resource security or stable raw materials supply at stable prices as their objective, however, this is balanced by mentioning a concern for the partner countries' perspective, or more precisely, its sustainable development based on resources. Finland and Sweden finally, both mining countries themselves and not as dependent on mineral resource imports as the other countries featured in the analysis, state as their main goal in the cooperation with developing and emerging countries a responsible mining industry and related practices as well as good management of mineral resources and respective regulatory regimes and administrative institutions.

The only commonly agreed priority for the cooperation with developing and emerging countries seems to be good governance and transparency. This is mentioned by the EU and all individual countries, except Poland and Austria.ⁱⁱ The Netherlands and the UK state the Extractive Industries Transparency Initiative (EITI) as an additional priority. Responsible mining and sustainable development also seems to be a concern for several countries. While Germany and Finland refer to sustainable and responsible mining (and processing) practices, the Netherlands and Sweden refer to sustainable development and growth respectively, which should be induced by good management of mineral resources and related revenues. The EU and the Netherlands see the development of geological knowledge and skills as well as investment promotion and access to finance in developing and emerging countries as further priorities. Finland and Sweden also prioritise export opportunities for their mining and related industries.

ⁱ Minerals Strategies do not mention a specific objective or priority for the cooperation with developing/ emerging countries, but they refer to several instruments or actions with impact on these partners.

ⁱⁱ Poland and Austria do not explicitly state any objective or priorities for their cooperation with developing/ emerging countries.

As regards the main instruments and actions in the cooperation with developing and emerging countries, the most commonly mentioned ones are trade related measures (application of WTO rules, commodity market liberalization – named by EU and all countries except Poland, Germany, Finland and Sweden)ⁱⁱⁱ and resource and raw materials diplomacy and advocacy and policy dialogue (mentioned by EU, Poland, Austria and UK). Other popular measures include raw material partnerships with resource-rich countries (Austria, Germany^{iv} and Netherlands), development cooperation (Netherlands, Finland and Sweden) and capacity building (EU, Germany and Netherlands).

In summary, considering the diverse interests and activities of the EU and individual member states in the resource cooperation with developing and emerging countries, and regarding the experiences with EU and member states' coordination efforts in other policy fields (e.g. development cooperation), a uniform, or even just coordinated, strategy for the resource-related cooperation with developing and emerging countries of the EU and all member states, seems unlikely in the nearer future.

2.3 Policy Coherence for Development

The EU defines its concept of Policy Coherence for Development (PCD) as “aimed at building synergies between EU policies, and whereas lack of political action to this end may have a negative impact on the expected result of development cooperation”¹⁵. PCD has been integrated in EU law since the Maastricht Treaty (1992) and further been reinforced in the Lisbon Treaty (2007). It has been a political commitment for the Commission, Council and European Parliament with biennial reports published on twelve main areas (later clustered into five strategic challenges) from 2007 onwards¹⁶. The European Parliament in its 2010 Resolution on the “EU Policy Coherence for Development and the ‘Official Development Assistance plus’ concept”¹⁷ (PCD ODA) “[c]onsiders that all EU policy areas with an external impact must be designed to support and not contradict the fight against poverty and the achievement of the Millennium Development Goals, as well as the fulfilment of human rights, including gender equality and social, economic and environmental rights”¹⁸. It further stresses the importance of impact assessments of European policies, including the impact of related private sector activities and makes several demands on trade agreements negotiated by the EU, e.g. the inclusion of “legally binding social and environmental standards”¹⁹ and the “coherence between trade and development policies”²⁰, including the consideration of PCD aspects in trade agreements.

While minerals and mining were not included in the original focus areas, the PCD ODA resolution of the European Parliament explicitly calls for the inclusion of raw materials¹⁸. The RMI, however, contradicts the EU PCD concept and several articles of the related EP Resolution. For instance, it is not accompanied by an impact assessment, it emphasizes access to raw materials without taking the partner countries' development agenda into account, and it promotes mining and the inclusion of access to raw materials in trade agreements without providing for any binding social, environmental and human rights standards.^{21 22 23 24}

While the RMI does state some typical development cooperation topics as beneficial for both, developing countries and the EU's access to raw materials^v, these topics were unilaterally defined by the EU.

One activity repeatedly called for in the debate about PCD and raw materials has been the EU initiative on due diligence along the mineral trade chain when sourcing from conflict-affected areas. The 2015 report on PCD²⁵ consequently mentions the EC proposal for an integrated EU approach to the responsible sourcing of minerals originating from conflict-affected and high-risk areas^{26 27} (an amended version of which has been adopted as an act in 2017²⁸)^{vi}, as an example for increased PCD.

ⁱⁱⁱ It should be noted that such actions are not instruments for cooperation. Most resource-rich developing (and emerging) countries oppose them as they believe that export taxes, for instance, would help their economic development. Trade related measures are nevertheless mentioned as they have an impact on developing and emerging countries.

^{iv} Germany, for instance, has put this policy into practice by creating resource partnership agreements with Kazakhstan, Mongolia and Peru. On the other hand, it should be mentioned that the German raw material partnerships are not working well; in particular the private sector's participation is missing. It seems to be very difficult to find common projects reflecting the different interests (Germany: wish for steady ore supply; partner countries: wish for investment and infrastructure).

^v These topics are Good governance, transparency of mining deals and mining revenue, a level playing field of all companies, financing opportunities, sound taxation regimes and sound development practices.

^{vi} The EU Supply Chain Due Diligence directive will be addressed in more detail in a forthcoming STRADE report.

3. Developing and emerging countries' mineral policies

An analysis of regional and national minerals and mining policies^{vii} of developing and emerging countries in Africa, Asia and Latin America, who are considered important mineral raw material suppliers to the EU, revealed that topics relevant for the advancement of the mining and minerals sector and the development based on that sector can be grouped into 13 different categories. Figure 2 provides an overview which topics are most important in which regions and countries^{viii}.

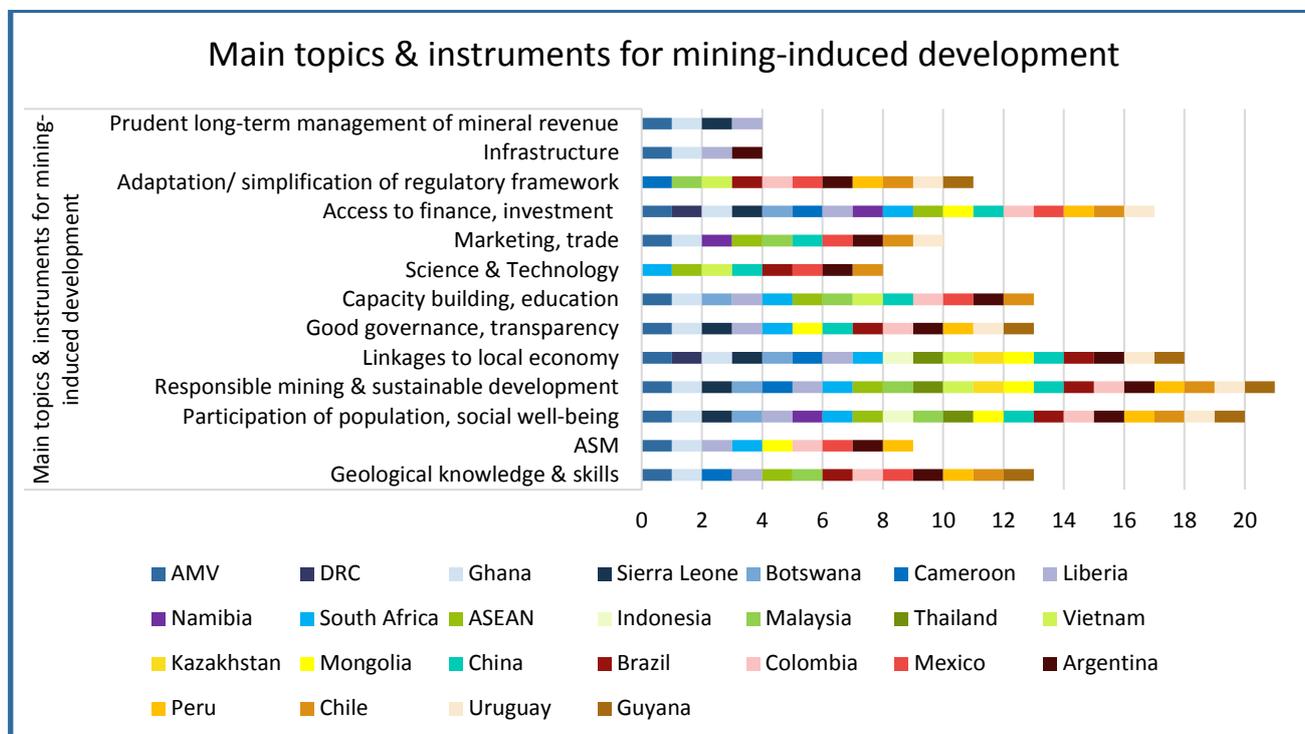


Figure 2: Summary of priority topics in resource-rich developing and emerging countries' mineral policies^{ix}. Source: own analysis based on countries' resource policies²⁹.

Main conclusions from the analysis of developing and emerging countries'/ regions' minerals policies include:

- Responsible mining and sustainable development is the most important topic, referred to by all countries except DRC, Namibia Indonesia and Mexico;
- Participation of the population and social well-being is almost as important, mentioned by all countries but DRC, Cameroon, Vietnam, Kazakhstan and Mexico;
- Linkages to the local economy (with local processing and value addition being mentioned most frequently) and capacity building and education are further topics of high relevance across all continents;
- Certain continental specificities can be observed:
 - For Africa, access to finance and investment is a general priority, mentioned by all analysed countries. Further important topics include good governance and transparency; geological knowledge and skills;

^{vii} The policies analysed were based on regional or national mining strategies – where available, mining legislative and regulatory documents, national development plans, country official presentations at mining conventions and policy dialogues (e.g. EU-Latin America dialogue on raw materials), EITI and NRGi as well as academic analyses. In some cases, e.g. South Africa, original policy documents are quite old, but have been included as no official update or replacement has been released so far.

^{viii} It should be noted that China is an important exporter and importer of mineral raw materials. As such, its policy addresses both areas. This policy brief focuses on China's role as an exporter of minerals to Europe and thus only includes those aspects of China's Policy on Mineral Resources dealing with the development of its mining sector and the country's development driven by the exploitation of its mineral resources. China's strategy for the import of mineral resources and the cooperation with other resource-rich countries has been looked at in a previous STRADE policy brief ⁽⁵⁾ and a report ⁽⁶⁾.

^{ix} AMV: African Mining Vision. DRC: Democratic Republic of the Congo. ASEAN: Association of Southeast Asian Nations.

artisanal and small-scale mining; prudent long-term management of mineral revenues; infrastructure; and marketing and trade. According to the African Mining Vision (AMV- implemented by 24 African states*), almost all identified topics are of importance for the continent’s mining and mineral related development; the lack of infrastructure (especially transport and energy) and the judicious and prudent use of mineral revenue to build up other forms of capital that can outlast the currency of mining, are particular concerns for this continent as mentioned in the AMV.

- For Latin America, apart from the topics of general relevance mentioned above (here especially participation of the population – encompassing local development, social license and consultation with indigenous communities – and responsible mining & sustainable development, which were mentioned by all Latin American countries except Mexico), further priorities are access to finance and investment and the adaptation/ simplification of the regulatory framework, especially licensing procedures (this being a topic almost specific to Latin America and here important for all analysed countries), geological knowledge and skills, and good governance and transparency.

4. Comparison of European and developing/ emerging countries’ mining strategies

Figure 3 below gives an overview of the developing/ emerging regions’ (Africa, Asia, Latin America) demand for development, and the EU’s and member states’ supply of assistance, in the respective fields in the minerals and mining sector as stated in the countries/ regions’ policies. Actual cooperation projects of the EU and member states are largely in line with the priorities stated in their policies, although some exceptions exist, for instance German projects on community and indigenous participation in the mining sector in Latin America

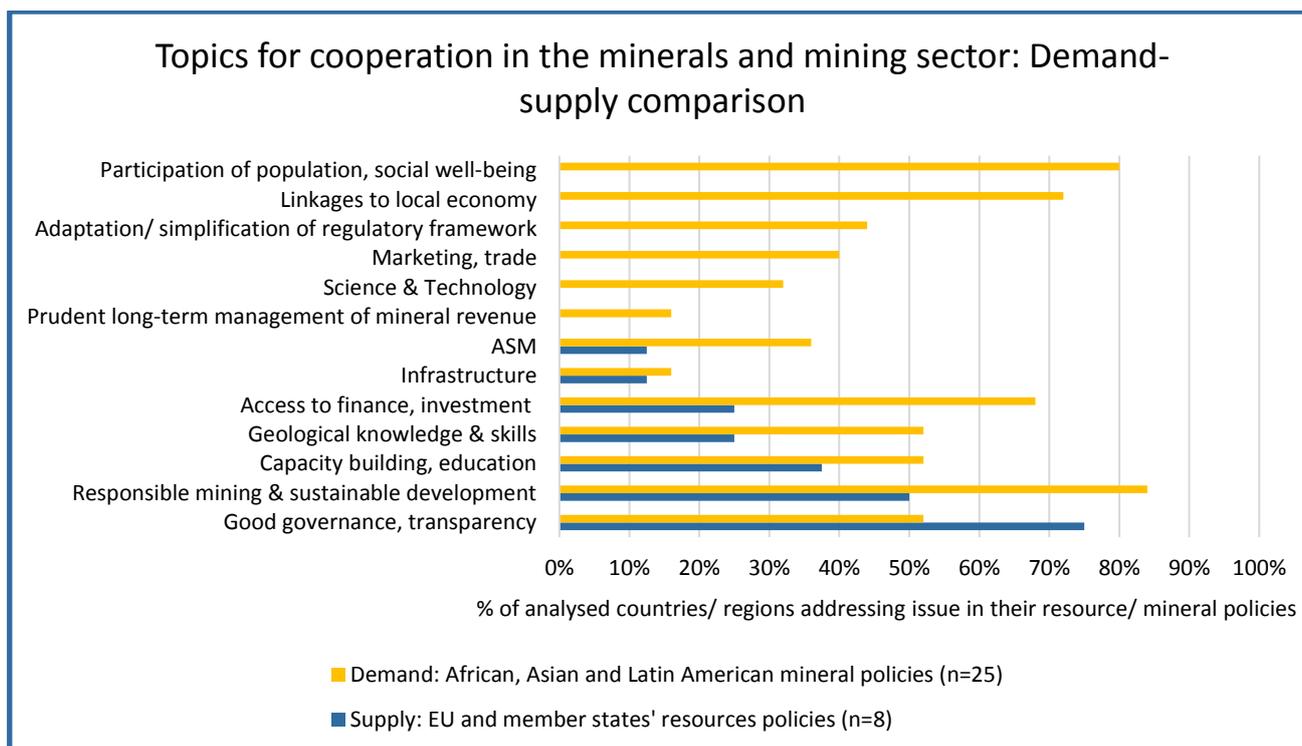


Figure 3: Demand-supply comparison of cooperation topics.^{xi} Source: Own analysis.

Figure 3 clearly shows that for some of the most important “demand” topics, such as participation of the population and social well-being and linkages to the local economy, the EU’s and member states’ resources policies do not currently mention them as cooperation priorities. Other areas in contrast, such as good governance

* Four out of eight regional economic communities (REC) have also aligned their regional mining policies with the AMV (COMESA, EAC, ECOWAS, SADC). Out of the countries included in the analysis, Ghana and Sierra Leone have aligned their mining policies with the AMV, DRC is in the process of aligning its mining sector to the AMV.

^{xi} ASM: Artisanal and Small-scale Mining.

and transparency, responsible mining and sustainable development and capacity building and education, seem to be well-recognised.

4.1 Specific topics for cooperation

Below, the most important topics for (potential) cooperation of the EU with resource-rich developing and emerging countries as identified from the analysis of the minerals policies are presented^{xii}. Some specific cooperation instruments are also discussed here. Due to space limitations in this policy brief, the discussion of further topics will be left for an upcoming report. Likewise, ASM – an important topic for many African, several Latin American and also selected Asian countries, and a potential field for cooperation or support from the EU – will be covered in detail in a later policy brief and is thus not further discussed here. Also, trade and related measures are important for a number of developing/ emerging and European countries. The topic has nonetheless been left out of the comparison chart and will not be further discussed here. Reasons for this are the fundamentally different views on what “trade” and related measures and “free and fair access to markets” mean. While Free Trade and Economic Partnership Agreements are considered by the EU as one of their main partnership instruments and the inclusion of raw materials in those agreements as a main instrument to counter impediments to free and unhindered trade in raw materials, several resource-rich developing and emerging countries (e.g. in Central Africa, East African Community, West Africa) are reluctant to sign such agreements on grounds of questionable benefits for themselves³⁰. Reconciling the different positions on this matter goes beyond the scope of this policy brief.

The following sections will first cover the topics which are already subject of EU cooperation projects or have been identified as important cooperation topics by the EU and then go on to discuss topics that are important for resource-rich developing and emerging countries but not yet (high) on the EU agenda for cooperation.

4.1.1 Current cooperation topics

4.1.1.1 Good governance and transparency

The topic is considered important in the AMV and in many Latin American mineral policies. The EU puts considerable emphasis on the support of good governance and transparency in resource-rich developing and emerging countries. It generally refers to a well-functioning rule setting, monitoring and enforcement and encompasses different levels of the mineral sector management, ranging from mining cadastre and mining contracts to sector revenues. A big share of European support for good governance and transparency in the minerals and mining sector goes to the Extractive Industries Transparency Initiative (EITI).

The EU mandatory disclosure requirement – Accounting (and Transparency) Directives (Country by Country Reporting) – will complement the EITI efforts by legally requiring companies registered or listed in the EU to disclose payments to governments along the same lines as EITI. In doing so, the ultimate objective is to contribute to the strengthening of the EITI and to extend its scope to all resource-rich countries³¹.

Good governance is considered by many to be of key importance for the successful development of countries. It has a strong overlap with other cooperation topics, such as environmental and social sustainability and responsibility and capacity building. It is, at the same time, a very complex and sensitive topic, which should be kept in mind in any cooperation engagements in this field.

One aspect of good governance that is, up to now, not subject of many support actions, is the strengthening of local government institutions and the alignment of different government levels. Local authorities are of key importance for the implementation of the legal and regulatory framework as they are the ones responsible for monitoring on the ground. However, they may have a differing agenda from the national sector administration.

Another aspect refers to parliamentary oversight over government actions to contribute to a good management of the sector and increased transparency, accountability and responsibility of all its actors.

The “tool box” below lists some ideas for possible instruments for each current cooperation topic that emerged from discussions with European stakeholders. These ideas will be discussed with stakeholders from resource-rich developing and emerging countries in the course of the project.

^{xii} Concrete ODA engagement projects of the EU and member states in the mining and minerals sector of resource-rich developing countries are analysed in a STRADE report ⁽⁶⁾. This Policy Brief focuses on cooperation topics as identified in countries’ and regions’ resources policies.

4.1.1.2 Responsible mining and sustainable development

Responsible mining and sustainable development mainly refers to responsible mining practices and thus protection of the environment, health, resources and human rights. Some countries go beyond the mining-internal sphere and talk about sustainable development based on mining. It is an important topic for almost all resource-rich developing and emerging countries. It is also an interesting topic for the EU, especially the Nordic mining countries. It has to be noted though, that sustainability may mean different things to different countries. In the area of setting and enforcing the respective legal and regulatory frameworks for responsible mining, there is an overlap with good governance. Regarding responsible mining practices and technology, there is room for private sector cooperation. The EU is known for its equipment being manufactured to highest environment and safety standards. Cooperation in this field could, as a positive side effect, also open up markets for equipment manufacturers looking into exporting to developing and emerging countries.

Several EU-Latin America projects support, for instance, environmental, health and safety and community relations performance of mining companies.

An important question is – especially as long as capacities for compliance monitoring are lacking in developing countries –, if and how the EU could hold EU companies accountable for activities abroad. A similar question arises with CSR and here directives have been repeatedly called for.^{xiii} Including environmental criteria in such standards is an option. Another idea that is in the public debate is including provisions for “responsible mining” in trade agreements the EU concludes with developing and emerging countries. Thirdly, the scientific cooperation should be expanded to include aspects of responsible raw material exploitation.

The “sustainable development license to operate”³² concept, which is based on the concept of a “social license to operate” and attempts to increase the extractive industry sector’s contribution to sustainable development, is worth exploring further for possible support through the EU. It is a step towards better integration of social and environmental topics and promotes the concept of “responsible mining”, advocated by STRADE, also on the private sector side.

4.1.1.3 Capacity building and education

The AMV calls for human resources development in Africa, for instance by supporting R&D and knowledge networks involving relevant actors from academia, government and industry, and by ensuring skills transfer components in all consultancies. Specific capacities that need to be developed are: technical; contract negotiations; resources development, management and governance (auditing, monitoring and regulating resource exploitation regimes). Several Asian and Latin American countries also prioritise capacity building.

See Policy Brief 01/2016¹ for more information on current EU funding for capacity building.

A topic that is only indirectly related to the mining and minerals sector, but still very important for the sector (as for almost any other) and the sustainable development of countries is general education.

4.1.1.4 Geological knowledge and skills

The AMV identifies basic geological knowledge as one of the key constraints for the development of the resources sector in Africa. It therefore calls for greater investments of governments and donors in geological mapping, in order to increase the knowledge base and thus be able to conclude contracts with more favourable conditions for the countries.

Tool box – current cooperation topics

- Funding for EITI und supporting measures
- Strengthening of local government institutions
- Strengthening of parliamentary oversight
- International guidelines for industry best practice on responsible mining
- Improvement of the geological database and related information
- Capacity building (tertiary education, vocational and professional training, exchange and twinning programmes, community learning events) on:
 - Good governance & transparent management of mineral resources
 - Set-up, monitoring and enforcement of legal and regulatory frameworks
 - Geo-knowledge
 - Increased environmental responsibility and sustainability
 - Best practices for ASM
 - Technical upskilling for employees and contractors in the mining sector

^{xiii} This topic is also discussed in a forthcoming STRADE Policy Brief.

Several EU cooperation projects focus on improving the geological database and related information in Africa through partnerships, professional exchanges, skills development and technical support. Examples include GIRAF (Geoscience Information in Africa – Network)³³; PanAfGeo (Pan-African Support to the EuroGeoSurveys-Organisation of African Geological Surveys (EGS-OAGS) Partnership)³⁴; and the Global Monitoring for Environment and Security (GMES) & Africa initiative³⁵, which focuses on cooperative action between Europe and Africa towards the development and implementation of Earth Observation applications, following the programmatic approach of the EU's Copernicus programme (formerly known as GMES) tailored to African requirements.

The topic is also important for Latin America and connected to the desire for more investment and improved access to finance expressed by a number of Latin American countries. It is highly relevant for countries such as Brazil, Colombia, Mexico, Chile, Uruguay and Guyana, notably considering the high potential of discovery of new deposits and the need to reduce geological uncertainties and assuring accessibility and quality/ reliability of the geological information. In this vein, an interest in the launching of an EU-Latin America initiative on the interlinking and collaboration among geological surveys has been identified. Led by EuroGeosurveys and the Organisation of Ibero-American Geological and Mining Surveys (ASGMI), the achievement of this initiative can be a stepping-stone to satisfying the Latin American cooperation demand on the matter.^{36 37}

4.1.2 Future cooperation topics

4.1.2.1 Participation of the population, social well-being

The topic is important for different countries from all continents. Policies refer to the possibilities of participation of communities in mining areas in specific mining projects and benefits provided (community service features), to the participation of the general population in the profits gained from extraction and trade of the country's mineral wealth and to the ultimate goal of the mining and mineral sector's contribution to the country's social well-being. A specific interest in many Latin American policies is the consultation with local communities and especially with indigenous ones. The topic is closely linked to the "social license to operate" (SLO) concept, which is also mentioned in some policies, but might be defined differently in different countries.

It is important in this context to distinguish between technical issues that can be resolved through the introduction of improved administrative processes, and structural root causes of tensions, such as the lack of capacity of local governments to implement regulatory frameworks, the lack of appropriation of the solutions proposed and, more generally, the uneven nature of the playing field on which many mining activities and negotiations take place.

The former, at least in absence of strong governance, depends to a large extent on negotiations between mining companies and local communities. To come to acceptable outcomes in these negotiations, trust and participative processes are of key importance. People tend to rather accept negotiation results (even if they are unfavourable to them and their interests) if they had a chance to participate in the negotiation process. Whether community services provided by mining companies are actually desirable is another debate. The associated problems become apparent when mines close.

It has to be noted, however, that in order to avoid tensions, negotiations have to take place from the outset of a project and on a level playing field, which is often not the case today. Moreover, tackling the root causes of these tensions depends on the government's capacity and willingness^{xiv 38} to implement regulatory frameworks and is therefore closely linked to good governance and respective capacity building. The importance of strengthening local government capacity and institutions and addressing the issue of the responsibility of the public sector and authorities, cannot be overemphasized in this regard. This is essential so they can be held accountable for what happens in the mining sector to their populations.

^{xiv} Analysts have described the "selective absence" of the state from the sector – a situation, which is a direct result of the mining reforms brought in over the last 30 years or more. These have, in an attempt to attract foreign investment, promoted deregulation of the sector and essentially shifted responsibilities from the host government and local governance institutions to the private sector, which thus gained considerable power. The relations between mining companies and host communities were, and often still are, therefore asymmetrical. Taking this historical context into account, it becomes evident that participation of the locally affected populations in the mining sector is of central importance. Longer term lasting solutions depend on creating a more level playing field among the actors involved in the sector. In this perspective, greater participation of communities and local governments as well as central governments becomes a critically important ingredient in finding solutions.

Direct engagement of the EU in this field is difficult, the suggested approach would therefore be indirect support, for instance through the instruments mentioned in the “tool box”.

The “tool box” to the right lists ideas for possible instruments for the future cooperation topics. Again, these ideas emerged from discussions with European stakeholders and will be discussed with stakeholders from resource-rich developing and emerging countries in the course of the project.

Tool box – future cooperation topics

- Financing and set-up of an information and expert platform for communities to help their negotiations with companies
- Development of rules for fair negotiation processes
- Brokering and partnering initiatives to help EU mining companies find local suppliers
- Development and dissemination of best practice guidelines for local economic integration
- Organisation of joint exchange and learning events with mining and oil & gas industry
- Support of feasibility studies for mineral processing plants
- Technology transfer for mineral processing

4.1.2.2 Linkages to the local economy

Integrating mining into the local economy through the creation of up-, down-, and side-stream linkages is a very important topic for African, most Asian and several Latin American countries. Many countries have defined local content requirements (mainly referring to employment and training, but also contracting) for foreign (mining) companies.

Up-stream linkages refer to the local supply of mining consumables and services and the successful creation of up-stream linkages requires the upgrading of local suppliers.

Down-stream linkages mostly refer to local/national mineral processing. This is mentioned in many mineral policies but is difficult to achieve due to two major bottlenecks: Cost-efficient mineral processing depends on reliable and cheap power supply and, for many minerals, on economies of scale. Some raw material partnership countries have requested technology transfer for local smelting in order to increase or maintain their raw materials industry’s competitiveness. However, they have mostly met resistance from import countries.^{xv} Side-stream linkages refer to different topics, such as sector-related knowledge, technology, transport and energy infrastructure.

4.2 Perception of EU resource policies and politics in partner countries

Identifying the perception of EU resource policies and politics in resource-rich developing and emerging countries, and those countries’ perspective on their needs for the development of their mining and minerals sectors and their economic development based on these sectors, is one of the core tasks of the project in order to give recommendations to the EU for an engagement strategy with those countries. Looking beyond the countries’ policies and engaging in a dialogue about the real matters on the ground is essential in this regard. This section attempts to give a first glimpse of developing country representatives’ perception of EU resource policies and actions. Generally, an EU strategy for resource-related cooperation seems to be largely unknown in Africa. EU actors or activities are most often evaluated in comparison to the Chinese.

With regards to EU development cooperation in the mining sector, an often-heard criticism is that the EU is carrying out too many studies and not implementing enough projects with tangible results. This perception has certainly intensified since the arrival of Asians and especially Chinese in Africa, who, irrespective of other criticisms, are regarded as delivering visible infrastructure. Another point that comes up in comparison to the Chinese is the positive mention of the latter’s non-interference with the political system.³⁹ This is especially interesting in light of the great emphasis the EU and member states put on good governance and transparency in their cooperation with resource-rich developing and emerging countries. On the other hand, it has to be noted that the AMV, as well as several developing and emerging countries’ policies, highlight the importance of these topics for sustainable development based on mining and mineral resources.

Antonio Pedro, Director of the UNECA sub-regional office for Central Africa, stated that “They [China] understood African interests, what is key to making Africa competitive. When the first deals were struck, everyone in the West was against this, they were complaining. Now the conversation is completely different.” At the

^{xv} The underlying conflict of interest is well illustrated by the example of China, a large exporter and importer of mineral resources, stating in its mineral policy to “encourage the export of deep-processed mineral products with high added value and the import of primary mineral products”.

same time, he argues that sustainability is important and the vision should go towards the future beyond mining. And he emphasizes: “We [EU and Africa] are equal partners”.⁴⁰

From interviews conducted with Cameroonian officials and citizens⁴¹, three main African perceptions emerge, usually expressed in comparison with the ongoing experience with Chinese mining operators:

- 1) Former mining players (pre-independence period, including colonial time) were regarded as unfair with the government, and especially with the local communities. In a Cameroonian gold mining area (Betare-Oya), it was reported that German and French entrepreneurs were harsh (violent) with their mining workers and did not share mining windfall profits with the country.
- 2) It was stated that western actors denigrate the new Asian actors, and precisely Chinese. Interviewees said that the Chinese were mining deposits that have been available for a long time, but have not been developed in industrial scale as the local government would have wished. But once the Chinese arrived, the Westerners attacked them and asked the government not to collaborate with them.
- 3) Western actors are regarded to have a certain humanism, as well as respect for the environment that were not seen as much in the Chinese players working with the interviewed persons. The Westerners are seen to work in a more considerate way and being more sensitive to the social problems of employees.

5 Discussion

Several of the thematic areas mentioned separately in the resource and mineral policies, are in fact intertwined. This should be kept in mind when designing targeted projects. For instance, capacity building is an important topic in itself, but it is also necessary for improving the management of the mineral sector and good governance in general, geological knowledge and skills, upgrading of local suppliers to better integrate mining in the local economy and other fields not discussed in detail here, such as ASM. And knowledge and related capacity development is repeatedly mentioned as the most important side-stream linkage of mining. The specific topics summarized under responsible mining and sustainable development include environmental issues, but also health and safety and, in some countries, human rights aspects. It is thus closely linked to the topic of social well-being, participation of the population and social license to operate on the private sector side. As social and environmental issues are very closely related in the mining sector (especially when looking at the impacts for local communities), it would be recommendable to integrate both topics into the general concept of “responsible mining”. Even up-stream linkages into the local economy, playing a significant role for the participation of the population in the mining sector, may partly be covered under this topic. Last not least, many people would argue that good governance in the sense of a well-functioning rule setting, monitoring and enforcement, would solve many of the current problems.

In all EU or member states’ cooperation engagements with developing and emerging countries, it should be kept in mind that these can support setting the right framework conditions, but the real actors in the minerals and mining sector are private companies. Any successful projects will therefore have to consider the private sector’s interests and look at supporting, and at the same time, regulating these actors. Strengthening local governance capacities is essential for the latter. Support should be extended to local companies in host countries in order to foster their participation in the sector and thus add value locally. Specific support measures for European companies will be discussed in a forthcoming report. Continuous dialogue and enquiring about the mining companies’ needs is as important here, as it is with developing and emerging countries. Support can be provided, for instance, through investments in Research, Development and Innovation (a focus of many current Horizon 2020 projects and supported through the EIP on Raw Materials) and voluntary initiatives of the mining sector.

Consumer demand for “responsible” products is rising and may play an important role in the future, also shifting the European policy perspective from “cheap and easy” access to “responsibly sourced” raw materials. It should be considered how this demand can be encouraged.

One topic that is crucial for a long-term sustainable development of countries, but has not been given much attention in any of the analysed policies, except Botswana’s, is the diversification of the economy for the time beyond mine closure. This is fundamental at both, the local level in terms of planning beyond an individual mine’s closure, and the national level, in order to deal with long periods with little mining investment.

6 Conclusion

The analysis of different EU institutions involved in the cooperation with resource-rich developing and emerging countries revealed that one harmonised EU strategy does not exist. Instead, each institution pursues its own cooperation strategy influenced by its core mandate. Similarly, the EU and its member states have not coordinated their cooperation strategies, resulting in different countries pursuing various goals in the cooperation with resource-rich developing and emerging countries, prioritising different topics and using diverse instruments. This is not surprising considering the challenge of defining a common EU identity and it might not be very problematic, apart from being suboptimal in terms of efficiency. But it has to be kept in mind during STRADE's work and points to the importance to address any recommendations precisely to the right target institution at EU and member state level.

The main objectives of the EU's and member states' resources policies range from access to raw materials to sustainable development of partner countries and export of mining, mineral sector management and related expertise. The most commonly agreed priorities for cooperation engagements are good governance and transparency, and responsible mining and sustainable development. The most commonly named instrument for cooperation or access to raw materials is trade related measures. Other popular measures include resources diplomacy and policy dialogue, raw material partnerships with resource-rich countries, development cooperation and capacity building.

For developing and emerging countries, the most important topics for the development of their minerals and mining sectors and their general development based on this sector are, according to their mineral policies: responsible mining and sustainable development; participation of the population and social well-being; linkages to the local economy; and education & capacity building. Additionally, there are some topics that are of particular importance for one or two continents, such as infrastructure and prudent long-term management of mineral revenue for Africa, adaptation and simplification of the regulatory framework for Latin America and geological knowledge and skills, good governance & transparency as well as access to finance and investment for both, Africa and Latin America.

The comparison of European and developing/ emerging countries' mineral and resources policies revealed that there is currently a certain degree of imbalance between topics for which support is offered by the EU and member states (supply) and topics for which support is requested by developing and emerging countries (demand). Several topics of importance for developing and emerging countries have been recognized by the EU and member states and are already reflected in cooperation engagements today. The most important ones are: good governance and transparency; responsible mining and sustainable development; education and capacity development; and geological knowledge and skills. Here, the main focus of further research lies on analyzing whether the current efforts are effective and if they should be adapted, intensified, broadened, or rather narrowed down to specific sub-topics. Important topics for possible future cooperation engagements include: participation of the population and social well-being; and linkages to the local economy. These topics could be integrated into existing cooperation programmes or addressed through new cooperation instruments.

The discussion revealed that several of the separate topics mentioned in the policies should rather be looked at in a holistic manner. The importance of the private sector, continuous dialogue with all parties involved, consumer power and economic diversification for the time beyond mining, has been discussed.

The last point shall be taken up here again, due to its importance. With mine closures being an inevitable part of mining and considering the high degree of dependence of many resource-rich developing and emerging countries on mining, it is alarming that so little attention is given to the topic of planning beyond mine closure in either host countries' policies or European cooperation strategies. It is crucial to adopt a broader, more holistic and longer term perspective that shifts the focus from mining and the development of the mining sector as an end in itself to it being an instrument for broader economic development.

The aim of the STRADE project is to give recommendations fostering a partnership-based and coordinated approach towards sustainable raw material relations between exporting and importing countries, integrating the demands of trade, industry, development and research policy. One recommendation will refer to the need to define the nature of the process, in which the desired results for a sustainable long-term partnership strategy can be achieved. STRADE will continue to identify the perspective of partner countries and capture this, together with detailed recommendations for cooperation engagements, in a forthcoming report.

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Project Background

The Strategic Dialogue on Sustainable Raw Materials for Europe (STRADE) addresses the long-term security and sustainability of the European raw material supply from European and non-European countries.

Using a dialogue-based approach in a seven-member consortium, the project brings together governments, industry and civil society to deliver policy recommendations for an innovative European strategy on future EU mineral raw-material supplies.

The project holds environmental and social sustainability as its foundation in its approach to augmenting the security of the European Union mineral raw-material supply and enhancing competitiveness of the EU mining industry.

Over a three year period (2016-2018), STRADE shall bring together research, practical experience, legislation, best practice technologies and know-how in the following areas:

1. A European cooperation strategy with resource-rich countries
2. Internationally sustainable raw-material production & supply
3. Strengthening the European raw-materials sector

Project Identity

| | |
|---|---|
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