

Working paper

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A stakeholder perspective on sustainable raw materials management

1. Introduction

The COBALT project

exchange for concerned stakeholders on SRMM

COBALT offers a platform for open dialogue and exchange for all concerned stakeholders to bring in their perspectives and views on challenges on the route towards a more sustainable raw materials management (SRMM¹). The different stakeholders concerned come from various economic sectors and are located along the whole raw materials value chain and life cycle.

During the course of the project, the COBALT team will publish a series of Working Papers which reflect on the views and perceptions of different stakeholders on various topics in the context of SRMM in Europe. These working papers will inform COBALT activities and events, and will provide a baseline for discussion among the various stakeholders involved in the project.

A European Approach to collective action: the European Innovation Partnership on raw materials

The European Innovation Partnership (EIP) on raw materials was setup in 2012 within the EU's Raw Materials policy framework to collaboratively engage in security of supply issues and associated environmental and social challenges. In this regard, the EIP brings together a wide range of European stakeholders to develop joint strategies, pool together capital and human resources, and ensure to tackle important challenges in the policy design and implementation phase.

¹ For a more detailed outline on the term SRMM please refer to the [COBALT background paper](#)



Multi-stakeholder engagement for collective problem solving

Investigating SRMM challenges and opportunities through a multi-stakeholder conference

Extractive sector and waste management environmental challenges are most prominent

COBALT, by nature and design, is run as a multi-stakeholder platform (i) to bring in perspectives from various stakeholders who lack capacities to actively engage into the dialogue on SRMM, and (ii) to open up the discussion to a broader audience. Therefore, dialogue among these stakeholders and, consequently, collaboration to collectively engage in problem solving are of prior interest of COBALT. In this respect, COBALT supports the European Innovation Partnership by supplementing the stakeholder engagement and collective action for tackling raw material challenges.

Exploring stakeholder perspectives on sustainable raw materials management: The COBALT Opening Conference

The COBALT Opening Conference was held on November 28-29, 2013 and brought together more than 80 stakeholders from 11 European countries. It was the first major event of the COBALT project and aimed to set the scene for the multi-stakeholder dialogue by touching on various raw materials challenges along the whole value chain. The topics of the Opening Conference reflected upon business opportunities with regard to changing global material availability and use, the European raw materials policy framework or consumer awareness, and changing consumption patterns. In this respect, the COBALT team is interested in scoping these perceptions and views on topics such as (i) environmental and social challenges, (ii) European and national policies tackling these challenges, and (iii) stakeholder collaboration. The results of the discussions and group work at the Opening Conference are summarized in a [Conference Report](#).

After the event, the COBALT project team investigated the diverse perspectives through a series of telephone interviews to provide insights on stakeholder perceptions on SRMM. In total, the COBALT project team conducted 26 telephone interviews between December 2013 and January 2014 with stakeholders who participated at the Opening Conference. The views expressed in this working paper reflect the opinion and perspectives of representatives from industry/business, civil society organisations, academia, private and independent research organisations, and policy making. The variety of different interview partners shows the diversity of perspectives that mirror the complexity and comprehensive nature of SRMM in general.

The following chapters summarize the interview results by elucidating differences and similarities among stakeholder groups, topics of high interest, and conflicting as well as common grounds for action and collaboration.

2. Environmental and social challenges along the entire raw material value chain

Reflecting upon the main environmental challenges ahead in the area of SRMM, the interview partners identified **environmental challenges associated with the raw material extraction sector as the most critical ones in the whole value chain**. More specifically, they mentioned in this context pollution of environmental media (air, water, soil) and the production of waste. Interestingly, most of the respondents, whether from industry/business or civil society organisations, consider environmental problems in extraction as a major issue in Europe and globally.

Besides raw material extraction, the interviewees consider environmental challenges for **raw materials waste management issues** (i.e. increasing recycling and collection rates, as well as respecting environmental standards in the recycling process) as the second most important issue.



Environmental challenges are closely related to social challenges

Production and consumption patterns must be addressed simultaneously.

Different sectoral policies are tackling specific raw material challenges

Next to environmental challenges in SRMM, we also asked about social or socio-economic challenges. As our interview partners pointed out, **environmental challenges are identified to have repercussions in relation to social challenges**: With regard to social challenges, the interviewees perceive **extraction activities and waste management** (in particular, recycling issues) as highly relevant. More specifically, land use conflicts in the extraction sector were prominently referred to. These land use conflicts, for example, refer to a variety of issues, such as competition on water consumption for other uses or impacts on tourism and farming as people's livelihoods. In the area of waste management challenges, a variety of different aspects were mentioned, e.g. consumer awareness and behavioural change with regard to recycling.

Interestingly, besides industrial activities in extraction and manufacturing, **final consumption/consumer aspects** play a crucial role among a considerable number of interviewees: Basically, interviewees perceive a change in consumption patterns: (1) increased awareness for eco-innovative or green products, (2) for recycling, and (3) for switching to less material intensive life-styles. In this respect, **changing consumption patterns** may more easily translate into improving environmental and social performance of products and processes, and, thus drive sustainability up the raw material value chain. Consequently, the interview partners consider both, production and final consumption systems, as important puzzle stones in resolving raw material challenges.

3. European and national policies addressing raw materials challenges

Overall, raw materials challenges go beyond security of supply issues - for example, negative environmental impacts by the extractive sector. In this respect, raw material challenges are subject to policies in different areas in policy making and, furthermore, on the European and national level.

The interview partners pointed out that **policies addressing the above mentioned raw materials challenges are addressed by different sectoral policies**. Therefore, efforts tackling SRMM have been quite fractured: at EU level, policy action is split between different Directorates General of the European Commission (e.g. DG Industry, DG Environment, and DG Research). Thus, some interviewees suggest engaging in raw materials challenges on the policy level requires a more integrated instead of a silo approach. In addition, several interview partners express a concern that raw materials challenges should not be tackled in isolation from thematic issues which are strongly linked to them. For example, with regard to energy, increased efforts on raw materials extraction and recycling will ultimately lead to increased energy consumption. Therefore, this issue needs to be addressed in a more coherent way by policy.

Since the area of raw material policies is broad and, depending on the various challenges along the whole value chain, policies are in different stages of maturation. Moreover, this policy field is new and, thus, the strategic importance of secure supply and SRMM has started to emerge as EU policy field in 2008 through the Raw Materials Initiative ⁽²⁾. In 2011, this policy field

² European Commission, (2008). The raw materials initiative — meeting our critical needs for growth and jobs in Europe. COM(2008) 699 final



got reinforced ⁽³⁾ and further strengthen in 2012 through the European Innovation Partnership on Raw Materials ⁽⁴⁾.

In this respect, our interview partners argue that the above mentioned **raw materials challenges are only partially addressed by policies at EU** (e.g. mining waste directive) **or national level (i.e. individual and specific programmes or directives)**. More specifically, some interviewees believe that concrete legislation or policies are not yet in place and, if so, they are only partially implemented. Therefore, they suggest that the EU level, in particular, should tackle these challenges.

4. Options for stakeholder collaboration responding to raw material challenges

Addressing raw material challenges requires a mixed consortium of stakeholders

The interviews reveal that the multitude of factors necessary for achieving SRMM require **engagement of various stakeholders** rather than single-edge actions by individual stakeholders. The multitude of factors referred to are: complex and interlinked value chains, a systemic view on both, production and consumption systems, the increasingly global nature of environmental and socio-economic challenges.

With regard to problem solving capacities by stakeholders, the interviewees argue that **problems related to SRMM cannot be addressed by individual stakeholder groups alone**. Interestingly, a few interviewees, who consider a single stakeholder group as sufficient, refer to the European Commission for tackling raw material challenges.

Mixed stakeholder consortia preferably consist of industry, policy and CSO or research representatives

The interview partners **prefer a mix of industry** (e.g. individual companies, sectors or their representatives), **policy** (European Commission, national governments, local/regional authorities/administration), **civil society (CSO) and research organisations** to be involved in sustainable raw material management. CSOs are seen as a very important stakeholder as they can bring in concerns from individual citizens or social groups that are usually neglected in the policy-making process.

5. The European Innovation Partnership on Raw Materials: A view on multi-stakeholder collaboration

Taking into account these perceptions on multi-stakeholder approaches for tackling raw material challenges and comparing them with the composition of the EIP's main governing body, the High Level Steering Group (HLSG⁵), reveals some interesting insights:

- The **perception of interviewees on industry representatives and policy makers** as important stakeholders to a large extent **mirrors the**

³ European Commission. (2011). Tackling the Challenges in Commodity Markets and on Raw Materials. COM(2011) 25 final.

⁴ European Commission. (2012). Making Raw Materials available for Europe's Future Wellbeing. Proposal for a European Innovation Partnership on Raw Materials. COM(2012) 82 final.

⁵ High Level Steering Group composition: https://ec.europa.eu/eip/raw-materials/sites/rawmaterials/files/High%20Level%20Steering%20Group_Sherpa%20Group.pdf



composition of the EIP High Level Steering Group. Essentially, the HLSG mainly comprises high level politicians, policy makers, and CEOs of major companies and high-level representatives of research organisations (see also the table below).

- When it comes to the **involvement of CSO and research stakeholders in multi-stakeholder approaches**, the perception of the interviewees **differs** from the stakeholders present in the EIP's **High Level Steering Group**. **Essentially, a considerable number of the interviewees believe that several CSOs are part of the HLSG:** Whereas representatives of research organisations still comprise a considerable number of organisations represented in the EIP, CSOs (e.g. social and environmental NGOs) only make up for one stakeholder in the EIP HLSG.
- In general, the composition of the EIP's HLSG shows a strong involvement of industry representatives (17 in total), compared to only 1 CSO representative. This **mismatch in the stakeholder representation in the HLSG** is addressed in COBALT that aims to foster stronger industry-CSO collaboration in SRMM.

Table: European Innovation Partnership on Raw Materials: Composition of the High Level Steering Group (number of persons representing particular stakeholder groups/organisations):

Stakeholder group represented in the High Level Steering Group	Number of individual members
Commissioners	3
Ministers	8
Extra members from EU Member State ministries	4
Industry	17
Research Organisations	6
NGOs	1
European Investment Bank	1

6. The European Innovation Partnership on Raw Materials: Addressing environmental and social concerns

In our interviews, we asked about the stakeholders' perception of the representation of environmental and social concerns in the European Innovation Partnership's (EIP) decision making processes. The majority of interviewees believe that **stakeholders representing environmental concerns are well represented in the EIP**. In general, the type of stakeholders representing environmental concerns is seen as quite diverse: interestingly, the interview partners believe that environmental concerns are not only brought in by common proponents, such as environmental NGOs or policy makers, but also by industry/business stakeholders.

The opposite is true for **stakeholders addressing social concerns and challenges**: almost half of the respondents mentioned that they **were not or only marginally represented**.

In a second step, interviewees were asked to identify specific organisations representing environmental and social concerns in the EIP's governing body. Surprisingly, most of the interviewees mentioned organisations which are not listed in the EIP's governing body. This suggests that there is either a severe

CSOs are an important element for SRMM and, thus, COBALT supports stronger CSO-industry collaboration

Environmental concerns are well represented by EIP stakeholders, whereas social concerns are only marginally represented



lack of information by stakeholders on the composition of the EIP's governing bodies or the stakeholder composition was not well communicated.

7. The COBALT platform: a means for open dialogue, awareness building and mutual learning

The COBALT project and, in particular, its events are designed to enable different stakeholders to actively bring in different views and perspectives. Factors which **facilitate an open and respectful dialogue** - where various stakeholders get together, meeting at eye-level and being willing and prepared to listen and explore even contentious issues - are also seen by the interview partners as key to foster stakeholder cooperation.

On the basis of the feedback we received from our interview partners who all participated at the COBALT Opening Conference in November 2013 in Brussels, we are able to identify three **important elements for supporting the exchange between stakeholders at a policy platform event**:

- 1) **Atmosphere and spirit:** The process and quality of how the interaction and the topics are addressed in an open and confident manner; e.g. the hosting organisation's objective attitude in actively bringing in various stakeholders perspectives.
- 2) **Structural and organisational conference set-up:** Arrangements are seen as useful that provide for (i) strong inputs by participants, i.e. small table discussions and working group sessions; and (ii) open discussion of participants' responses to pre-defined topics in plenary or break-out sessions.
- 3) **Selection of conference presenters and topics:** The interviewees consider it as crucial to have conference inputs by a broad variety of stakeholder groups (i.e. a diverse number of key-notes, panellists) touching upon different topics (through different working groups and different sessions) from various points of view.

The COBALT Opening Conference explored whether the issues discussed and the viewpoints presented have an **influence on a participants' perspective or knowledge base**. The interviewees pointed out that the conference provided them with a **better understanding of the complexity and plurality of the issue, and the trade-offs between economic, social and environmental issues** with regard to raw material management.

8. The way forward for a multi-stakeholder dialogue on sustainable raw materials management

Interviews with engaged stakeholders and the experiences from the first COBALT events (Opening Conference and 1st EU Civil Society-Industry Dialogue) provided some interesting first insights on

- (1) where are spots and potential unexplored areas for stakeholder collaboration located along the whole raw materials value chain and life cycle,
- (2) what are most pressing – conflicting as well as commonly agreed – topics on SRMM,
- (3) how COBALT and its activities can contribute to broaden the perspective on SRMM in terms of actively involved stakeholders as well as linking not yet engaged ones to topical debates and respective challenges.

The plurality of issues and specific conference setting helped participants to better understand the complexity and trade-offs in SRMM

A mapping of stakeholder interests and perspectives informs future COBALT activities



9. References

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