THINKING STRATEGICALLY ABOUT MINERAL GOVERNANCE FUNDING:

PERSPECTIVES ON CURRENT AND FUTURE PRIORITIES

Leila Kazemi and Anna Bulman

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Acknowledgements

Authors

Leila Kazemi
Lead author and researcher

Leila Kazemi is a political economy and governance expert. For the last two decades, she has provided research, analysis, policy advice, and program development support on issues pertaining to the governance of extractive industries, business and human rights, and human rights and development. For several years, Leila led work on the Politics of Extractive Industries, a project of the Columbia Center on Sustainable Investment devoted to advancing more politically savvy ways of working on extractives governance issues. As a long-time consultant, she has worked with a range of organizations, including multilateral development banks, international NGOs, private foundations, academic institutions, and UN agencies. Leila holds a Master of Science degree in International Relations from the London School of Economics and received her Doctorate in Political Science in 2010 from Columbia University, where her research focused on the relationship between the governance of foreign investments and host state sovereignty.

Anna Bulman
Contributing author and researcher

Anna Bulman is a lawyer by training with 15 years' experience spanning a variety of fields. Anna has worked in international human rights law for the UN, in constitutional litigation in South Africa, for the South Australian judiciary, and for a major corporate law firm. Her more recent work has focused on the practical application of global standards to land-based investments, including for the ALIGN project and as lead author on technical guides regarding investment screening and incentives. Anna holds a Master of Laws from Columbia University and a Bachelor of Laws, Bachelor of Arts, and Diploma of Languages from the University of Adelaide.

You can contact the authors at mgsurvey2025[at]gmail.com.

Contributors

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Disclaimer

Designed by: Fabio Lütz – fabio.lutz[at]gmail.com

Executive Summary

Explosive demand for minerals – driven by energy transitions, defense rearmament, digitization and artificial intelligence, and standard economic growth – taking place in a context of geopolitical fragmentation is accelerating mining worldwide. For producer and processing countries, mining and mineral value chains have the potential to make significant contributions to strengthen national economies, combat poverty, advance equity, and improve social welfare. Globally, these activities have the potential to help hasten transitions away from fossil fuels to more sustainable energy sources, to secure and diversify mineral access for consuming countries, companies and consumers, and to help lessen the gap between high- and low-income countries. However, as decades of experience with extractive industries have shown, none of these positive outcomes is guaranteed. Indeed, evidence abounds not only of failures to realize benefits, but also of the potential social, economic, political, and environmental harms of mining. Over the years, those concerned with the performance and impacts of extractive industries, including mining, have come to appreciate the importance of governance factors in conditioning outcomes, that is, in shaping whether opportunities will be realized and harms avoided. Yet, at the exact moment governance needs are rising, funding for mineral governance seems to be tightening. Official development assistance is contracting and several legacy philanthropies are scaling back their funding for such issues. For those working to improve mineral governance, this means having to do much more with less.

There is growing pressure to ensure that the funding that is available for mineral governance work will be used to maximum effect, to advance coordination over fragmentation, and strategic thinking over passive "business-as-usual" approaches. This funding scan is intended to serve as an input into the process of helping funders and implementing parties contend with this task. It represents a starting point for conversations among them. Drawing on publicly available data, dozens of interviews, and surveys of implementing parties and funders, this scan sheds light on current and anticipated developments in the mineral governance funding landscape.

Impressions

Based on our analysis of target actors, types of mining and minerals, geographic distributions, thematic focus areas, and types of strategies and approaches being favored, some funding patterns seem to emerge. There appears to be **growing enthusiasm for**:

- **Target actors** – Funding is expected to increasingly flow to national government and national civil society actors in producer countries and, among some funders, to subnational and community level actors as well.
- **Geographic focus** – Sub-Saharan Africa has long dominated and is anticipated to continue doing so, followed by growing concern among funders for Latin America and the Caribbean and, to a lesser extent, East Asia and Pacific regions; the Democratic Republic of Congo (DRC) and Indonesia are the specific countries in which funders seem to be the most active.
- **Types of mining and minerals** – Funder interest in critical energy transition minerals (CETM) appears to be growing rapidly while a handful of funders are increasing support for artisanal and small-scale mining and work on supply chain initiatives targeting individual minerals.

- **Thematic areas** – There seems to be a strong pivot towards supporting work on national economic development goals pursued through the exploitation of mining and associated value addition opportunities as well as continued attention to a wide constellation of environmental and social impacts of mining and mineral supply chains. Interest in mitigating the climate impacts of mining is increasing among a small group of funders.
- **Strategies and approaches** – While technical support to address capacity gaps and undertake advocacy continue to be popular among mineral governance funders, there seems to be increasing variation in potential strategies and approaches being considered for support including dialogue and coordination platforms, knowledge production and sharing mechanisms, and private sector-focused activities.

On the other side of the coin, our analysis suggests the following are areas where there seems to be **less or waning funder enthusiasm**:

- **Target actors** – While global actors have been major funding recipients to date, a broader "localization" trend seems to be contributing in part to anticipated declines in support for these actors.
- **Geographic focus** – South Asia, the Middle East and North Africa, and Europe and Central Asia are neither major current recipients of funding nor expected recipients.
- **Types of mining and minerals** – Some funders and implementing parties anticipate the rise in interest in CETM will displace work on the broader range of minerals and types of mining, including whole-of-sector activity which was long prominent in mineral governance funding.
- **Thematic areas** – Longstanding funder support for open governance work focused on transparency, accountability, and participatory governance appears to be receding while very few funders are supporting work on conflict minerals and armed conflict.
- **Strategies and approaches** – Some concerns were raised around funding shifts away from core or general operating support to more constrained project-based funding as well as around a potential decline in funding for work on global standards.

Reflections

Interview subjects and survey respondents provided reflections on the implications of some of the trends above. With regard to **target actors**, they raised points about the potential benefits and tradeoffs of shifting focus from global actors to regional, national, and in some cases subnational, government, and civil society actors. For instance, on the one hand, each level of proximity that is advanced provides the opportunity to build on the knowledge, expertise, voice, authority, and influence of actors closer to the mining experience. On the other hand, the case was made for the complementary value of global actors and their broad reach in, e.g., setting standards, connecting actors and carrying insights across contexts, and advocacy in international fora. A number of reflections focused on the importance and potential impact of funding subnational governments and mining-affected communities and the inherent challenges of doing so. When supporting government actors in particular, some argued that more attention should be paid to addressing political context, including how to foster durable reforms in the face of government turnovers and how to align power and interest dynamics to drive progress on governance reforms.

Considering choices about **geographic focus**, a few of the factors that might influence funder decisions were flagged. These include whether funding would be more strategically targeted at newer producers representing a relatively blank slate on which to impart good governance practices, or more established producers that already have some governance foundations in place. The magnitude of a specific country's mining sector or potential, as well as level of economic development, can also play a role in shaping where mineral governance funding flows. Similar to the discussion of target actors, potential benefits and tradeoffs also characterized reflections related to choices and implications of focusing on different **types of mining and minerals**, e.g., whether momentum behind CETM is practicable and useful or instead is detracting from progress for other areas; or the costs and benefits of focusing on large-scale industrial mining versus artisanal and small-scale mining.

Reflections on trends in **thematic areas** focus largely on three of the main categories of funder activity discussed above. Ideas were surfaced about why support for *open governance* work may be decreasing, including: lack of clarity around causal mechanisms/change pathways; perceived underperformance of existing efforts/insufficient evidence of impact; and the absence of strong political support from leaders and broader publics in funder and producer countries. Concerns were also raised around the potential ramifications of inadequate attention to these issues, including losing ground on existing gains, jeopardizing the prospects of future mineral governance efforts, and generating supply chain risks. On *environmental and social impact efforts*, it appears that there is considerable variation in specific areas of focus, including an apparent division between those who are generally supportive of mining and who tend to focus on improving local benefits and minimizing harm from mining, and those who are more agnostic to the fate of mining and more supportive of community voice and empowerment in the face of mining (including the right to oppose mining projects). As governance interventions to support *mining-driven national economic development* priorities increasingly appear to be emerging as prominent focal points for many funders, their efficacy becomes that much more important. To improve prospects for success in this area, the analysis synthesizes insights offered on how to deliberately address specific challenges that have often historically impeded progress on such pursuits, including technical and administrative gaps, political inviability, unrealistic expectations, and non-inclusive approaches to national economic growth.

When it comes to **strategies and approaches**, there appears to be a much wider range of possibilities emerging than in the past. Evolutions of established approaches were also identified, including through the localization of knowledge production, which can contribute to more context-sensitive and locally informed approaches to mineral governance. Thoughts on what it would take to realize the potential value of funder enthusiasm for strategies and approaches intended to leverage the influence of private sector actors and initiatives often boiled down to supporting efforts actively addressing relevant power, interest, and incentive alignments. In the face of uncertainty about funder enthusiasm for global standards, there is also disagreement across funders and implementing parties about whether and how the potential reach of these standards could contribute to meaningful changes on the ground.

How funders decide and undertake funding

Among the many **factors that shape funder decision-making**, internal priorities and attributes can significantly influence flows as can specific attributes of recipients. How issues are framed as well as trends in the broader mineral governance funder ecosystem also matter. There seem to be implicit assumptions among implementing parties and others that funders give the highest priority to the pursuit of impact. However, how impact is defined and measured is highly variable across different actors and its pursuit by funders is at times superseded by other factors.

As mineral governance funders look ahead and consider some of the implications of this analysis for whom, where, and different aspects of what they fund, interviewees offered some insights into **improving how they fund**, including:

- **Addressing funding constraints** head-on either by looking for ways to expand the funding pool or thinking deliberately about how to do more with less.
- Identifying and acting on the **comparative advantages** of individual funders.
- Taking more **politically savvy approaches** to funding in order to improve prospects of impact.
- Building on **lessons and experiences from the decades of work of the extractives governance field** – both in terms of a range of good governance practices across mining value chains and key risks and opportunities in the implementation of these.
- **Aligning time horizons and expectations** appropriately.
- Moving away from a view of mineral governance issues as discrete action areas and towards more of a **systems change approach**.
- Adopting more **flexible and adaptive funding approaches** to navigate the uncertainties of governance reform efforts.
- Taking deliberate steps to support **experimentation for innovation**.
- Increasing **funder coordination and collaboration** at all levels.

The hope is that the insights from this analysis provide funders and implementing parties with a starting point for systematically thinking about the landscape of mineral governance funding and will spark discussions on how funders can most constructively direct their resources to maximize their impact on improving mineral governance outcomes moving forward.

Definitions and acronyms

Term	Meaning in this report
Advocacy	Activities and outputs such as publications, media coverage, and information campaigns and sharing that seek to influence decisions related to mineral governance.
AI	Artificial intelligence.
ASM	Artisanal and small-scale mining.
Brownfield vs. greenfield mining	Brownfield mining is mining that takes place in "areas that have been previously explored, developed, or mined for minerals" while greenfield mining occurs in areas with little or no past experience with mining.[1]
CETM	Critical energy transition minerals such as copper, cobalt, nickel, lithium, graphite, rare earth elements (REEs), aluminium, cadmium, tellurium, selenium, chromium, and zinc, and others.[2]
Climate-focused foundations	Private foundations whose work is driven by global climate goals.
CSO	Civil society organization.[3]
FPIC	Free, Prior, and Informed Consent.
Funder	An overarching term to describe those entities – public, private, or corporate – that are providing funding for mineral governance work. Similar terms used in other contexts include donor and granter.
Implementing party	The recipient of funding who will be actioning the activity, whether by re-granting or performing the actual work.
INGO	International non-governmental organization.
Mineral/s	All metals and non-metals that are extracted through mining.
Mineral governance	"[T]he system of values, policies and institutions by which a society manages its economic, political and social affairs through interactions within and among the state, civil society and private sector" applied here specifically to mining and minerals.[4]
ODA	Official development assistance, i.e. "government aid that promotes and specifically targets the economic development and welfare of developing countries."[5] ODA can be undertaken bilaterally or multilaterally.

1 For more on these definitions and discussion of considerations related to these types of mining, see Invest in Gold (September 21, 2023). "Brownfield vs Greenfield Mineral Exploration."

2 List taken from the UN Secretary-General's Panel on Critical Energy Transition Minerals (September 11, 2024). "Resourcing the Energy Transition Principles to Guide Energy Transition Minerals Towards Equity and Justice."; see also the International Energy Agency (Last updated April 24, 2025). "Final List of Critical Minerals 2022."

3 A civil society organization is defined by the United Nations as "any non-profit, voluntary citizens' group which is organized on a local, national or international level." UN Civil Society Unit (undated). "About Us." [accessed February 3, 2026].

4 UN Development Program (undated). "Governance and peacebuilding: Responsible and accountable institutions." [accessed on February 3, 2026]. Non-metal minerals include gemstones and those used in building materials, fertilizers, and industrial processes.

5 Organization for Economic Co-operation and Development (OECD). (Undated). "Official development assistance (ODA)." [accessed on February 3, 2026].

Introduction

As global demand for minerals increases dramatically, the governance of mining and mineral supply chains[6] will in many ways determine whether and by whom the potential benefits from these developments will be realized, and whether a variety of potential harms can be avoided. Certain funders have been supporting work on these issues in hopes of tipping the balance towards better outcomes for governments and populations of producer countries. However, such funding appears to be contracting for various reasons and is now being dwarfed by the rapid rate of expansion of mining. For those seeking better social, economic, political, and environmental outcomes from mining, there is an urgent need to consider how to deploy existing and future funding for mineral governance as strategically as possible.

This funding scan focuses on current and anticipated trends in funding by public, philanthropic, and industry donors to improve mineral governance. It identifies gaps and opportunities to optimize mineral governance funding at a moment of shifting geopolitical contexts, funder priorities, and country finances. The scan is intended to serve as a springboard for debate, collaborative strategic thinking, and action on mineral governance.

How to read this analysis

The primary goal of this scan is to encourage conversations. It shares common perceptions, elevates existing ideas, and opens up new lines of discussion. It does not give specific answers. The points made will resonate differently with different readers. Some readers may see gaps in the analysis or find that issues are framed in ways that differ from their own perspectives and experiences. You may disagree with impressions being offered. This is to be expected and encouraged. In many ways, exploring such differences and disagreements – as well as the implications of areas where there is agreement – is the point of this undertaking. The analysis is meant to provoke reactions and reflections, to help highlight situations in which expert impressions might deviate from existing evidence, and to inspire strategic conversations and thinking among those working on mineral governance and the larger ecosystem they occupy.

This scan covers as much ground as possible and shares the bulk of the content from our key inputs (particularly the interviews and surveys). You may find it more useful to focus on the parts most relevant to your own work by navigating through the content using the subheadings. You can find examples and elaborations in the footnotes.

6 Referred to within the analysis as “mineral governance.”

What the scan is and is not

As with any analysis, this one comes with areas of focus and boundaries on scope. Among other things, it is **not**:

- A comprehensive mapping of all the issues, activities, actors, geographies, and modalities of support related to mineral governance.
- Full of specific and definitive facts and figures about the mineral governance field (data can be quite uneven and it was beyond the scope of this relatively modest endeavor to construct more comprehensive datasets).
- A deep literature review.
- A prescriptive analysis weighing in on what any funders should be doing.[7]

This analysis **is**:

- A first attempt to understand current and anticipated contours of and developments in mineral governance funding at a high level.
- A representation of broad trends and impressions informed by the data collected and interviews and surveys described in the methodology below.
- An attempt to synthesize a wide range of concerns and views.
- A conversation starter for others to react to.
- An input for funders trying to think strategically about deploying their finite resources.
- An input for implementing parties to consider in strategizing their own work, including around funder advocacy.

Methodology

In this scan of the landscape of current and anticipated mineral governance funding trends, the client and project advisors perceived that the greatest value to the field would come from the forward-looking priorities of key actors (both funders and implementing parties). Accordingly, we made careful decisions to balance the available time and resources between assessing current and future work. Three main methodologies were applied in this research:

1. Compiling a **database of currently-active mineral governance projects** based on publicly-available datasets and funder websites. We included 380 activities in our analysis of current instances of mineral governance funding spanning the period July-October 2025.
2. Conducting **interviews with funders and implementing parties** to fill informational gaps about currently-active mineral governance projects and to build a picture of funding priorities and demands from implementing parties moving forward. We interviewed 22 funder representatives or consultants from 21 entities, and 16 implementing party representatives from 15 different organizations.

7 For a more prescriptive analysis related specifically to critical energy transition minerals see Natural Resources Governance Institute (January 2025). "Priorities for the United Nations High-Level Expert Advisory Group on Critical Energy Transition Minerals: Recommendations from Convening on Fostering Equitable Economic Benefits in Transition Mineral-Producing Countries, December 2024."

3. Distributing **2 online surveys** – one for funders and one for implementing parties (the latter in English, French, and Spanish) – to supplement the perspectives collected through interviews. We received 3 responses to the funder survey and 11 responses to the implementing party survey.
4. Undertaking light **desk research** to supplement, contextualize, or elaborate analysis.

Where findings from the interviews versus the dataset diverge, there could be a variety of causes, including sampling on both sides, incomplete data, time lags between dataset content and current or anticipated priorities of funders, and also misperceptions by funders based on partial knowledge. These methodologies, including any limitations, are described in greater detail in the **Funding Scan Methodology document**.[8]

8 The Funding Scan Methodology document is a separate document available on the scan's landing page: https://taicollaborative.org/thinking-strategically-about-mineral-governance-funding-perspectives-on-current-and-future-priorities.

Current mining and mineral governance context

Major structural shifts have been taking place over the last several years, influencing not only the role of mining and mineral flows in local, national, regional, and global contexts, but also how these activities are governed. Key developments in economic, political, and funding landscapes shed important light on mineral supply and demand pressures as well as mineral governance priorities among different actors.

In terms of relevant **market conditions**, global demand for mining and minerals has exploded in recent years to meet the needs of global energy transitions, digitization and AI data centers, expanding defense sectors, and simple GDP growth worldwide. Although there are no standardized measures of future demand, commonly cited estimates suggest that "demand for key minerals, such as copper, lithium, graphite, nickel, and rare earth elements, is expected to nearly double by 2040"[9] and potentially increase by 500% for many of these by 2050.[10] Similarly, "demand for minerals like steel, copper, phosphates and aluminium is surging, driven by their use in vehicles, advanced agriculture, construction, power technologies and other critical industries."[11] The result is widely interpreted to be extensive pressure to expand global mining and processing and to do so quickly.

On the supply side, mining activities are distributed across the world (see the International Council on Mining and Metals (ICMM) mapping replicated in section III), with certain minerals and metals highly concentrated in specific countries (e.g., nickel in Indonesia or cobalt in DRC). Looking specifically at energy transition minerals, a recent analysis estimates that "54% of projects are located on or nearby Indigenous peoples' lands."[12] Refining and processing of minerals and metals is often highly concentrated in countries like China, the United States, and Australia, with China dominating refining across "19 of 20 key energy-related minerals, with an average global market share of around 70 percent."[13] Finally, in terms of supply-side timeframes, it is estimated that the average lead time to bring a new mine ("greenfield") online from discovery to production is roughly 18 years,[14]

9 World Bank Group (undated). "Minerals and Metals." [accessed February 3, 2026].

10 World Bank Group (undated). "Climate-Smart Mining: Minerals for Climate Action." [accessed February 3, 2026].

11 Aguilar, T. (January 30, 2025). "Mining's next chapter: driving innovation, resource stewardship and global progress." World Economic Forum.

12 Owen, J. R., Kemp, D., Lechner, A. M., Harris, J., Zhang, R., & Lèbre, É. (December 1, 2022). "Energy transition minerals and their intersection with land-connected peoples." Nature.

13 Gupta, C. (October 30, 2025). "Critical Minerals Explained: Why They Matter for Geopolitics, Clean Energy and Tech." Harvard Kennedy School, Belfer Center for Science and International Affairs; "In the mining of critical materials, dominant positions are held by Australia (lithium), Chile (copper and lithium), China (graphite, rare earths), the Democratic Republic of Congo (cobalt), Indonesia (nickel) and South Africa (platinum, iridium). This concentration becomes even more pronounced in the processing stage, with China currently accounting for 100% of the refined supply of natural graphite and dysprosium (a rare earth element), 70% of cobalt, and almost 60% of lithium and manganese." International Renewable Energy Agency (IRENA) (July 2023). "Geopolitics of the Energy Transition: Critical Minerals."

14 Manalo, P. (April 10, 2024). "Average lead time almost 18 years for mines started in 2020-2023." S&P Global; Brownfield projects tend to be cheaper and faster but not sufficient to keep up with projected demands, see Investing News Network (January 29. 2018). "Brownfield Projects: Less Risk, Faster Returns."

due to factors like declining deposit sizes, financing constraints, increasing complexity, market volatility, and higher social and environmental standards.[15]

The **political backdrop** for mineral governance funding is also evolving in important ways. After a surge of democratization following the end of the Cold War, over the last decade democracies across the world are in decline or on the defensive.[16] At the same time, authoritarian behaviours and, in many cases, authoritarian populism appear to be on the rise.[17] As corruption and state capture beset countries worldwide, civil society and media have come under increasing attack.[18]

Globally, there is growing geopolitical fragmentation and competition among key powers, exacerbated by wars in Ukraine, the Middle East, and elsewhere as well as more adversarial economic relations among them. As a consequence, confidence in multilateralism and other forms of international cooperation seems to be giving way to more fear-driven, inward-focused national or regional (in the case of the EU) stances. In this context, many high-income consumer countries are now very concerned about the security of their mineral supply chains to meet escalating demands described above. Many governments, in the West in particular, are eager to diversify both sources of minerals and also downstream processing and refining activities to reduce dependence on China.

Under such circumstances, many low- and middle-income producer countries are seeking to maximize opportunities for economic gains from the mining and mineral supply chains. This typically involves aspirations to move from simply exporting raw materials to attempting to reap more benefits by domesticating midstream and downstream value addition opportunities. In short, producer countries are hoping to leverage global demand spikes to maximize their benefits and avoid what several interviewees and survey respondents described as the more exploitative extractive patterns of the past.

The **global funding landscape** has also been changing in important ways in recent years. ODA, both bilateral and multilateral, has been contracting dramatically. Key funder governments have been slashing aid budgets (and many are anticipated to continue doing

15 Smith, B. (November 28, 2025). "How Long Does it Take to Permit and Develop Mines - What are the Bottlenecks?" Azo Mining.

16 For more on democratic decline, see, e.g., Dean. J. (January 17, 2024). "Democratic Decline: A Global Phenomenon, even in wealthy nations." Cornell Chronicle; and Freedom House (March 3, 2021). "New Report: The global decline in democracy has accelerated."

17 See, e.g., Morgan, M. (November 8, 2021). "Understanding the Global Rise of Authoritarianism." Stanford University, Freeman Spogli Institute for International Affairs; and Clark, C. (October 24, 2024). "A new kind of authoritarianism: Democracy in decline at home and abroad." University of California, UC San Diego.

18 For more on closing civic space, see, e.g., Kleinfeld, R. (March 6, 2024). "Closing Civic Space in the United States: Connecting the Dots, Changing the Trajectory." Carnegie Endowment for International Peace; Civicus Monitor (January 2024). "Rights Reversed: A Downward Shift in Civic Space (2019-2023)." Civicus; and on growing restrictions on press freedoms, see, e.g., Ferragamo, M. (May 2, 2025). "World Press Freedom Continues Decline at a Time of Upheaval." Council on Foreign Relations; United Nations, UN News (May 2, 2025). "Journalism facing new threats from AI and censorship."; and for attacks on human rights, land, and environmental defenders, see, e.g., Global Witness (undated). "Land and Environmental Defenders." [accessed February 1, 2026]; Gardiner, S. & Bogrand, A. (February 2, 2024). "Congress Must Support Human Rights Defenders." Oxfam; and World Resources Institute (undated). "Standing Together for Grassroots Environmental Defenders (STAND)." [accessed February 3, 2026].

so), punctuated by the US' major reductions in funds in 2025.[19] In addition to changes in the volumes of ODA, there have been shifts in the locus of this type of funding. Over the last decade or so, once-dedicated aid agencies like Australia's Agency for International Development (AusAID), the UK's Department for International Development (UK DfID), the US' Agency for International Development (USAID), and others have been dissolved or shifted into other government entities. In some cases, e.g., with AusAID and DfID, their work was absorbed into foreign affairs and trade ministries, representing a shift in overall orientation and priorities. As a result, alignment with funder government foreign policy goals has become a driving force and "aid funding that once might have been justified by humanitarianism or shared global responsibility is now often sold as something that will directly benefit the donor nation."[20] In practice, this seems to be contributing to a "win-win" orientation, aligning funding with the advancement of funder government trade and investment promotion/protection or security goals and potentially undercutting humanitarian aid along the way. These bilateral aid developments have knock-on effects for other funders, including multilateral development funds[21] and philanthropies, as well as spurring growing interest in engaging the private sector (e.g., through blended finance mechanisms[22]).

19 For more on the specifics of decreasing aid budgets, see Laub, K., Setiabudi, N., Dwyer, S., Barter, E., Welch, Z. & Smole, E. (July 4, 2024). "The Budget Cuts Tracker." Donor Tracker, which includes projected cuts for 2026; and this recent OECD analysis (June 26, 2025). "Cuts in official development assistance." Organization for Economic Co-operation and Development; and also, for links to specific countries' attempts to navigate aid cuts, including Germany, the UK, and US, see Hughes, S., Janus, H., Mitchell, I. & Röthel, T. (December 11, 2025). "How to Deprioritise? Selecting Themes, Countries and Instruments for German Development Policy." Center for Global Development; for more on the dynamics of aid cuts and migration of aid agencies within governments, see Saeteraas Stoum, T. M. (March 15, 2025). "The End of Aid? Why development practitioners should speak up." Medium.

20 Saeteraas Stoum, T. M. (March 15, 2025). "The End of Aid? Why development practitioners should speak up." Medium. See this piece for more on the dynamics of aid cuts and migration of aid agencies within governments.

21 For more on impacts on multilateral development funds and organizations, see, for instance, OECD (June 26, 2025). "Cuts in Official Development Assistance." Organization for Economic Co-operation and Development; and Madan Keller, J., Landers C. & Rockafellow, R. (November 13, 2025). "Financing at a Crossroads: How the Global Fund Can Adapt to a Shrinking Aid Landscape." Center for Global Development.

22 For a discussion of how blended finance might catalyze more allocations of "private capital towards projects with a high development impact," see IBD Invest (undated). "Blended Finance." [accessed February 3, 2026].

III

Developments in funding flows

Navigating this section

The focus of this section is broad trends in funding flows and is based on our interviews, survey responses, and dataset. Please note that, across this section, information drawn from the dataset is often expressed in terms of **instances of funding and not volumes of funding flows**. This is because the publicly available data is often not disaggregated or expressed in ways that readily allow for isolating specific allocations for mineral governance activities. Therefore, we could not make confident assertions about aggregate trends due to these data limitations. Additionally, as described in the **Funding Scan Methodology document**,[23] the dataset is not comprehensive and funding amounts would be at high risk of being taken out of context and skewing perspectives on volumes of funding. The main exception is occasional references to a handful of illustrative examples of the largest instances of funding in our sample that are clearly dedicated to mineral governance.

After a brief discussion of overarching trends, the bulk of this section is divided into subsections exploring:

1. **Target actors:** Who are the actors being funded?
2. **Geographies of funding:** Where is funding going?
3. **Types of mining and minerals:** What categories of minerals and mining are attracting funding?
4. **Thematic focus areas:** What types of themes are being focused on?
5. **Strategies and approaches:** What types of strategies and approaches are being supported?

Within each of these subsections, we offer:

Impressions – Descriptive statements of some broad trends based on data and/or observations shared in interviews and surveys.

Reflections – A sampling of analyses and syntheses of specific points that emerged primarily from interviews and surveys, accompanied by supportive or contextualizing inputs from the database and the authors' own knowledge and perspectives. These are not neutral nor exhaustive summaries, but informed perspectives and interpretations derived from relevant research undertaken for this project.

Spotlights – Where deemed useful, focused discussions of topics related to the main text but explored in greater detail than other points due to illustrative value or extensiveness of input received on a particular issue from surveys and interviews. These are meant to provoke thought and share suggestions offered by experts but not to prescribe specific solutions.

Gaps – Areas explicitly identified by interviewees and survey respondents as mineral governance gaps meriting more resources and attention.

23 The Funding Scan Methodology document is a separate document available on the scan's landing page: https://taicollaborative.org/thinking-strategically-about-mineral-governance-funding-perspectives-on-current-and-future-priorities.

Conversation-starter questions – An illustrative and non-exhaustive selection of questions to provoke further thinking and dialogue between funders and implementing parties that encourage reflection on tradeoffs, priorities, and operational realities. They can also be the basis for identifying potential opportunities for collaboration as well as starting points for broad discussions, strategy workshops, or bilateral dialogues to move beyond descriptive trends toward actionable decisions.

Annex I sets out the substantive subheadings of Sections III, IV, and V to help contextualize the analysis.

Overarching funder trends

Despite expanding mining activity, there is a widespread perception that global contractions of the sort seen with ODA are actually translating into less funding for mineral governance work than in prior years, an assertion that the authors' data can neither verify nor dispute.[24] However, it is unclear what the future holds and whether prospects might improve over perceived shortfalls through the infusion of new funding, including from climate-focused foundations.

Within the different subgroups of mineral governance funders, there have been some important perceived developments in recent years. For instance, **funder governments**, as noted above, have seen a strong shift in motivations from more humanitarian and sustainable development priorities to decidedly more self-interested mineral security and trade and investment promotion goals, which tend to result in many of them supporting the expansion of mining sectors across the world. Newer funder governments to the mineral governance space, including Japan and Korea, firmly exhibit the desire to leverage their funding to help diversify mineral supply chains and decentralize dependence on China. Meanwhile, the abrupt suspension of USAID activities is seen as a major blow to mineral governance work worldwide, especially around anti-corruption efforts that the agency had spearheaded and supported.

Multilateral funders were often described by interviewees as supporting the expansion of mining. As one staff person at a multilateral organization described it, there appears to be a "strong upward trend" in funding for project finance and related infrastructure and a "strong downward trend" in funding for work on the *governance* of this mining. Others agreed with this point that investment in the mining sector seems to be consuming a growing portion of shrinking ODA budgets, while resources for improving how the sector is governed are decreasing (much less expanding to keep pace with sector expansion).

In terms of **private foundations**, it was noted that a handful of the social justice-oriented foundations that had long been major donors to work on extractives governance broadly have in recent years withdrawn funding from the field, and others are anticipating scaling back in this area moving forward. However, it was also speculated by one respondent that as a portion of overall extractives governance work, funding for mineral governance might be increasing relatively speaking (as some funders back away from oil and gas issues). In addition, there have

24 **Methodological note:** Due to a focus on currently-active projects, and limitations of the publicly available data, the authors are not in a position to weigh in on historic or even contemporary trends in terms of volumes of funding. Moreover, because, historically, funding in this area was likely to be more broadly directed at "extractives governance" issues, an agenda with considerable focus on problems related to oil and gas sectors, it is difficult to parse out funding that was specifically directed at mineral governance issues to compare to current levels. Indeed, it is possible that, while actors working on or supporting extractives governance issues have seen a contraction in support for these, funding specifically targeting mineral governance may well be increasing overall.

been efforts to attract a new set of funders to the field: **climate-focused foundations** (for more detail see *Spotlight: Specific considerations for funders focused on global climate priorities*). Their interest in this area is often related to securing responsibly sourced minerals to accelerate global energy transitions. While hopes have been high among many implementing parties that these funders would emerge as major funders of mineral governance work, these relatively new actors to this space have been described as focusing largely on technology and financing issues when it comes to mining and traditionally less on governance matters. Lastly, **industry donors** are also emerging as important funders of mineral governance activities, particularly as government funding is being scaled back.

In terms of distributions and relative weight of different groups of funders, according to the sample captured in the dataset for this analysis, despite some interest among private and industry foundations, the largest mineral governance allocations still originate primarily from established public funders. Of the 15 activities with the highest allocated amounts that we deemed to be primarily focused on mineral governance issues, the vast majority came from the European Commission (9). The remaining 6 cases were distributed across the International Development Association (World Bank) (2), and then 1 each from the BHP Foundation, Germany, a collaboration between Canada & the Netherlands, and a consortium involving the EU, Germany, the UK, and Norway.

1. Target actors

Summary

Impressions: Who is being funded

Current headlines

- INGOs are key funding recipients, followed by national civil society actors
- Producer governments attract a fair bit of funder attention, particularly from funder government and multilateral development banks
- Other global actors, including global knowledge producers and multistakeholder initiatives, receiving meaningful funding

Anticipated shifts

- INGOs and other global actors likely to be somewhat de-emphasized by funders
- Producer governments are expected to become the main focal point for a range of funders
- National civil society and knowledge producers assuming relatively greater importance to funders than in the past
- Some funders are increasing support for subnational civil society and mining affected communities

Reflections: Potential implications and concerns

- Managing tradeoffs related to shifts taking place
- Considerations when funding subnational actors
- Funding technically sound and politically viable government action

Gaps: Actors with perceived need for greater attention

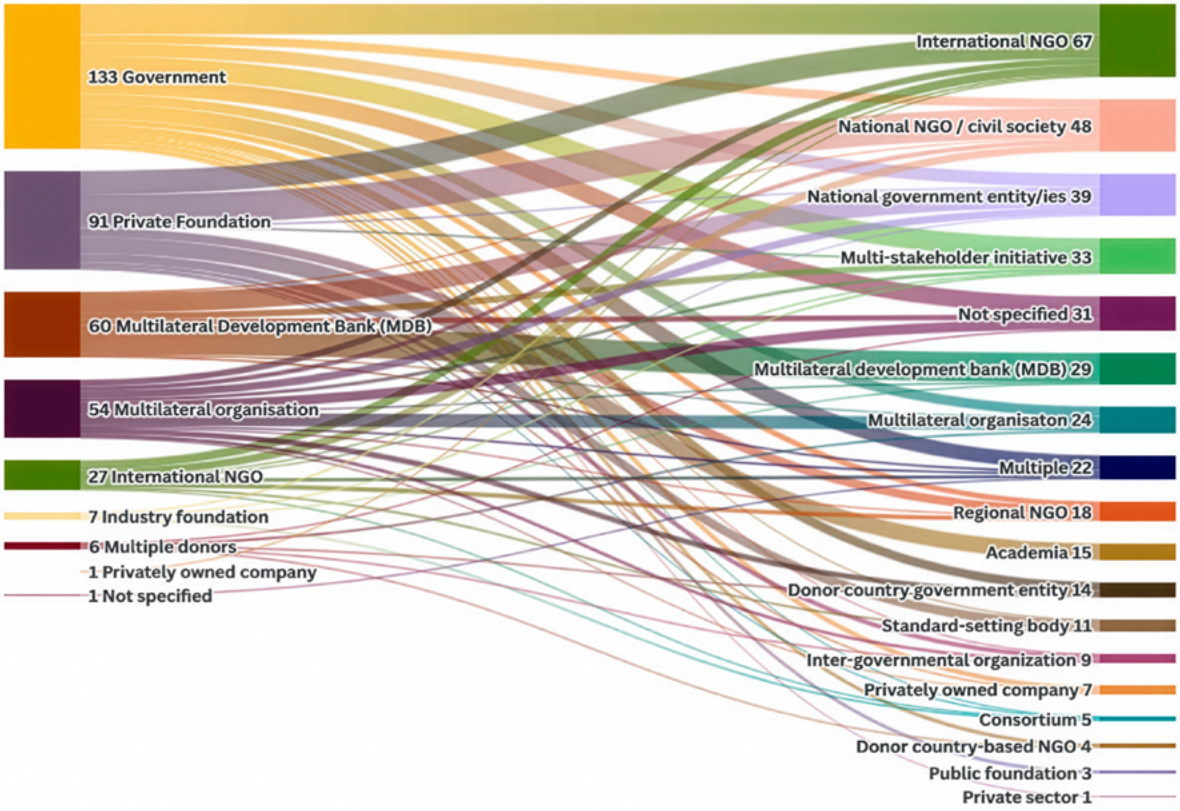
- Parliaments and judiciaries
- Subnational governments
- Community level actors

Impressions

Figure 1 provides an illustrative overview of current mineral governance funding flows from funder type to implementing party type derived from our dataset.[25]

25 Notably, of the 31 activities that did not specify the implementing party, 9 were European Commission activities and 16 involved German government funding, two of larger funders in the dataset.

Figure 1: Funding flow from funder type to implementing party type based on research dataset of 380 current mineral governance activities compiled for this scan (measured in instances of support)[26]



To complement this information, we also explored anticipated trends with interviewees and survey respondents.

Producer governments will be prioritized by many funders moving forward while intergovernmental and multistakeholder initiatives may be de-emphasized

Various funders, particularly government funders, indicated that it was becoming more difficult politically to justify support to global initiatives and processes, due in part to pessimism about their prospects of progress in an increasingly fragmented global geopolitical context and in part based on assessments of their track record to date.

Although not aligned with the data on current funding trends (which may also be obscured by the "not specified" entries and other data limitations – see the Methodology[27]), the bulk of funders who were interviewed or responded to the survey indicated that, moving forward, their intention is to focus more resources on actors within producer governments. For development

26 **Methodological note:** In addition to the limitations described in the Funding Scan Methodology document, this particular chart should be read with an understanding that, of the 91 recorded private foundation activities, 53 came from a single foundation that looks likely to fund less mineral governance work moving forward.

27 The Funding Scan Methodology is a separate document available on the scan's landing page: https://taicollaborative.org/thinking-strategically-about-mineral-governance-funding-perspectives-on-current-and-future-priorities.

banks, multilaterals, and government funders, this is not unexpected. However, even some philanthropies are intending to support government actors both directly and indirectly (by funding actors that advise or assist officials in the governance of their mining sectors). This marks a partial shift away from civil society-focused change pathways that had previously been prominent targets of many funders of extractives governance work in the past and which continue to be important for many implementing parties. The underlying rationale seems to be an acknowledgment that, as an interviewee from a private foundation that for many years focused on working with civil society put it, "you can't get anything done without the state."

In terms of the distribution of funding across actors within governments, according to the findings in our dataset, ministries of finance and economics as well as ministries of mining (or mining and energy) represent the most instances of funding recipients, followed by ministries of environment, forestry, and/or fisheries. Planning agencies and other government entities received a small amount of support. Among other things, this overall distribution suggests that much of the current funding is going to those actors within government who tend to be most supportive of the expansion of mining (though it is likely their centrality to mining activities and not this preference *per se* that explains their being favored by funders).

Support for civil society and knowledge producers seems to be evolving away from international to national and subnational actors

In our forward-looking conversations, support for civil society actors in general seems to be waning somewhat. Within that broad impression, there appears to be variation when it comes to different kinds of actors within civil society. Several people observed that international non-governmental organizations (INGOs), once at the center of global work on extractives (including mining) governance, are now being de-emphasized somewhat. One person went so far as to describe current developments as representing an existential crisis for INGOs. While a handful of funders mentioned making a few larger bets on a small number of well-established INGOs, some of those on the receiving end reported that these grants were notably smaller than in the past, leaving even these organizations in a vulnerable position.

However, as funding for INGOs may be contracting, some see a corresponding pivot on the horizon towards increasing funding for national and subnational civil society actors. One person thought this was particularly true of national civil society actors working to bolster government capacity.

Reflections

Potential benefits and tradeoffs in shifting from global to national funding targets

As attention and resources appear to turn to national governments and civil society in producer countries, some are optimistic about the prospects of improving mineral governance outcomes. By moving away from "top-down" approaches historically favored across the broader development community and engaging more directly with key actors involved in mineral governance "on the ground" – and in some cases, giving them a greater voice in determining how funding might best be directed – the hope is that resources will be more strategically

targeted at the specific constraints and opportunities of a given context. Funding targeted in these ways is intended to prioritize those actors most directly implicated in shaping mineral governance outcomes in a given setting, and improve cost-effectiveness, bolster local capacity, and enhance durability of governance reforms by reducing reliance on intermediaries.

Others advise funders to remember that national-level actors and activities can benefit significantly from complementary work by global actors and processes. They caution funders against a wholesale shift away from the latter (as some fear may be happening). As an implementing party interviewee noted, INGOs have long played a central role in defining and implementing global standards on mineral governance, connecting actors and insights across geographies and issues, identifying overarching global trends, building bridges between international and national/local processes, and advocating in international fora. With growing uncertainty around INGOs' future role in advancing mineral governance,[28] multiple interviewees from INGOs working on mineral governance remarked on experiencing these developments firsthand and the resulting staffing and programmatic cuts that have ensued. Lastly, some are concerned that emphasizing support for government actors will skew funding away from others, such as national and subnational civil society actors, who perform key functions in terms of monitoring, advocacy, and accountability.

Considerations when funding subnational governments and mining-affected communities

For those funders supporting subnational governments and mining-affected communities, multiple interviewees remarked that this focus might be more labor-intensive than focusing on other types of target actors. That is, it usually requires more time and relationship-building in a very localized way to prospect and implement effectively. Some argue that funding in this highly localized way may also prove more limited in terms of scale of impact, favoring a small number of specific subgroups of actors and interests over broader swaths of populations. The counterargument expressed by multiple interviewees was that these local government actors and communities are most directly impacted by mining and often have the least power and capacity to respond in ways that advance their interests. Therefore, it is argued, they should be supported because their need is greatest. Lastly, some reasoned that a deeper project-level focus may also unearth valuable learnings with broader application.

Supporting governments in technically and politically smart ways

In terms of funding for government actors, a few suggestions were offered to improve prospects of success. One was to consider how to design support for reform processes in ways that foster continuity despite the possibility of turnovers in government or in personnel of specific government bodies. Another concern raised was how to ensure that those government officials being supported through technical assistance and other mechanisms have not only the technical capacity they need but also the power and incentives to make and implement commitments to mineral governance reforms. The former might include supporting coalition-building across government actors and between government officials and other actors (it

28 For a discussion of this issue in the context of the broader development field, see Lagomarsino, G. (September 16, 2024). "The future of international NGOs: Defining our role in locally led development," Results for Development.

was noted that civil society actors can bring more durability to the work of these coalitions as they are typically less susceptible to turnover). The latter might include funder incentives for effectively implementing governance reforms or disincentives for failing to do so.

Gaps

Within government

Parliaments and judiciaries – With the exception of one funder, support to producer governments tends to focus on executive branch officials, who are key to policy-making and implementation. However, less resources are going to parliamentarians who are crucial for legislating and approving budgets and to judiciaries that are vital for upholding laws.

Subnational governments – One interviewee from a funder government observed that there is far too little support going to subnational governments that often play an important role in mineral governance at the project or processing site level. They speculated that, in addition to requiring more time and effort to identify the right targets and interventions, some government and multilateral funders might shy away from this kind of work because producer government officials can see it as diverting resources, and potentially power, from the central government and its activities.

Beyond government

Community-level actors – Multiple funder and implementing party interviewees and survey respondents argued that, while a few funders were beginning to support community-level actors (or those directly working with them), in general the need for such support – particularly in response to the magnitude of expansion of mining – was far greater than the level of support on offer. Some also described a perceived preference among funders focusing on local impacts to prioritize national civil society organizations (CSOs) as recipients or conduits of funding, which does not always filter down to the community-level actors.

Conversation-starter questions on target actors

What are the anticipated benefits of expanding focus on producer governments? What are the risks or factors that might impede them from translating this support into improved governance outcomes? How might these risks be mitigated?

What are the challenges or drawbacks of working more directly with mining communities? For those funders supporting this kind of work, how do they address these?

What might be lost if the role of INGOs, multistakeholder initiatives, global knowledge producers, and intergovernmental bodies working in this space contracts considerably? How important are these losses relative to the anticipated gains of focusing resources elsewhere?

In terms of anticipated outcomes of funding for mineral governance, or "bang for the buck," how do subnational, national, and global targets compare to each other and is one more likely than the others to result in significant social, economic, political, or environmental improvements in producer countries?

2. Geographies of funding

Summary

Impressions: Where funds are going

Current headlines:

- Sub-Saharan Africa is the region receiving the most mineral governance funding
- Many funders have taken a global approach to date
- Latin America and the Caribbean region has received significant funding to date
- East Asia and Pacific region has had fewer funding opportunities than the above
- Other regions, including Middle East and North Africa, South Asia and Europe and Central Asia all receiving very limited support

Anticipated shifts:

- Sub-Saharan Africa likely to see even more funding opportunities
- Support for work with global scope decreasing somewhat, giving way to more regional and country-level activities
- Latin America and the Caribbean region is anticipated to see some expansion in funding
- Funding to East Asia and Pacific region is expected to see an uptick, particularly focused on Indonesia
- Funding occasionally focused on higher-income countries

Reflections: Some factors shaping the geography of mineral governance funding

- Established vs. new producers
- Magnitude of mining sectors
- Level of economic development

Gaps: Geographies with perceived need for greater attention

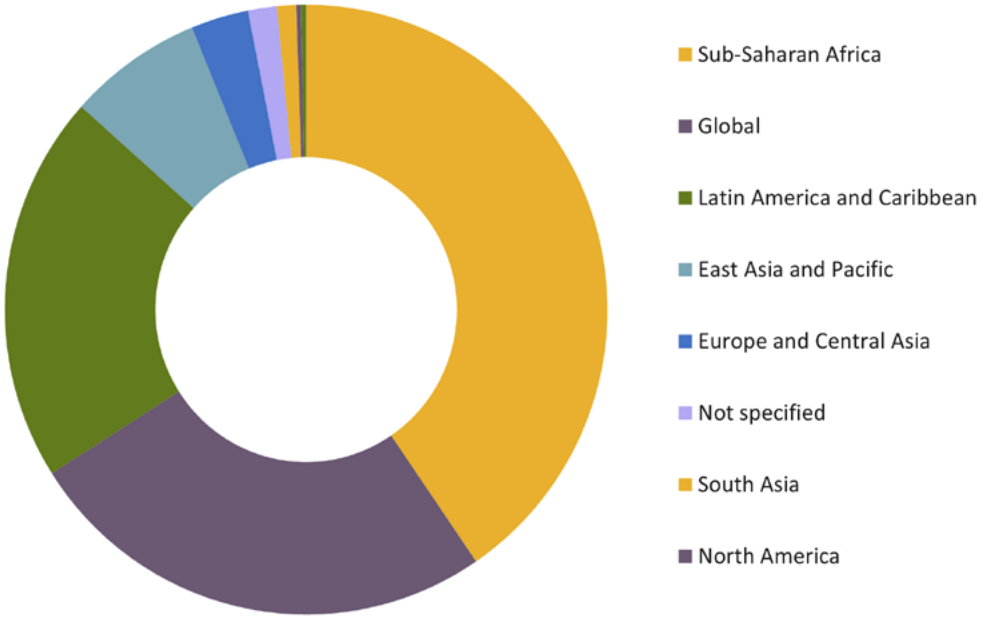
- Subregional clusters of countries connected by specific projects
- Middle East and North Africa
- Central Africa

Impressions

As the explosion in demand for minerals has been driving investors and companies to seek out opportunities for mining projects across the globe, mineral governance funding leaves few regions untouched (even while specific countries within these regions tend to be emphasized). **Figure 2** depicts the regional breakdown in our dataset, with a majority of currently-active mineral governance activities in the dataset focused in Sub-Saharan Africa. Global, and Latin America and Caribbean efforts were the next highest categories represented in the sample.[29]

29 **Methodological note:** We allowed up to 2 regions to be entered per activity and if more than 2 regions were referenced, we deemed the activity "Global." In the end, only 5 entries received 2 regional hits.

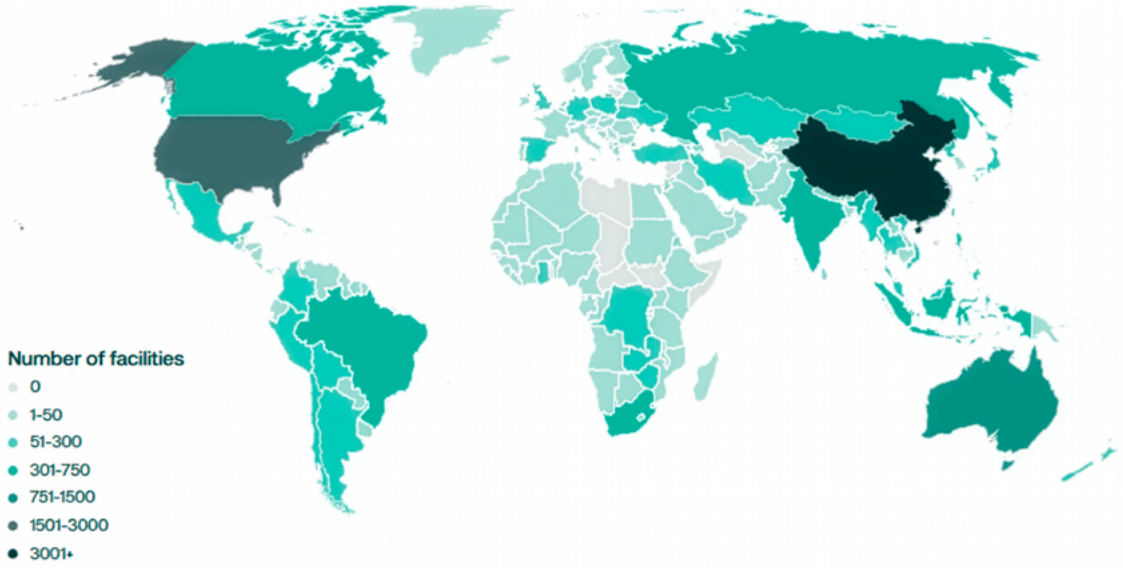
Figure 2: Regional breakdown in research dataset based on up to two regional hits[30] per activity



A more or less similar pattern emerges when looking at the top 15 instances (in terms of amount of funding) focusing specifically on mineral governance in our dataset, but with Latin America and the Caribbean getting a relatively smaller slice of the pie and East Asia and Pacific and South Asia not featuring.[31]

Before delving deeper into current and anticipated geographic trends in mineral governance, it is helpful to see where mining is currently happening (**Figure 3**).

Figure 3: Where mining is happening



Source: ICMM, The Global Mining Dataset Understanding the global distribution of mining and metals facilities (September 2025)

30 "Hits" refer to instances of funding tagged in our database that match specific search or sorting criteria.

31 The regional breakdown in terms of number of instances for these particularly large projects was as follows: Sub-Saharan Africa (7), Global (5), Europe and Central Asia (2), and Latin America and the Caribbean (1).

Sub-Saharan Africa continues to be a favored region for funders of mineral governance work

In general, sub-Saharan Africa (per our explanation of regional groupings in the **Methodology**,[32] we will refer to this subregion in the analysis as "Africa") has been and continues to be the region receiving the highest number of instances of mineral governance funding and support from the greatest number of funders. The region represented 41% of geographical region focus in our dataset. Within Africa, specific countries emerge as priorities: DRC has by far the highest number of currently-active mineral governance activities (29), which is unsurprising given its wealth of minerals. The next highest are Uganda (13), Ghana (11), and Nigeria (10). In forward looking discussions with interviewees, enthusiasm seems to be building to expand funding for mineral governance activities in DRC and Zambia, as well as Ghana, Malawi, South Africa, and Tanzania.

Latin America and the Caribbean are gaining more attention

Beyond Africa, the perception among some interviewees was that after a decade or two of being under-prioritized by extractives governance funders, the Latin America and Caribbean region appears to be attracting more funding for mineral governance work in recent years. As one interviewee from a multilateral organization said, due to the potential for large mining projects, "Latin America is back on the menu" for investors and funders.[33] While the work of the Inter-American Development Bank accounts for a significant portion of instances of currently-active mineral governance activities in Latin America and the Caribbean, a constellation of other funders are active in the region with the number of private foundation activities (22) slightly higher than multilateral development banks (20) and funder governments (18).

Specific East Asia and Pacific countries are attracting some funder support

Although appearing to be a somewhat lesser priority for the funders in our dataset sample (7% of instances of support), the East Asia and Pacific region was noted as appealing to some funders because of the strong institutional foundations on which to build in countries like the Philippines and Mongolia and lower levels of conflict than other regions. An expert on the region observed that, while funders and investors were historically less interested in supporting work related to mining value chains in East Asia and Pacific countries, funding for mineral governance work will likely expand as increasing demand for minerals drives more mining activities in that part of the world. Indonesia appears to be leading the way. The country's growing role in global nickel production and processing is capturing the attention of numerous funders.[34]

Other regions remain fairly quiet in terms of funder support

Despite some significant mining projects, only 4 instances of funding in our dataset were directed to South Asia (3 for work in India) and a small handful across the Middle East and

32 The Funding Scan Methodology is a separate document available on the scan's landing page: https://taicollaborative.org/thinking-strategically-about-mineral-governance-funding-perspectives-on-current-and-future-priorities.

33 Our sample of currently-active mineral governance activities across the globe shows that Peru has the second highest number of instances of support (15), Brazil has 11, and Colombia has 10. Another 24 instances of support in the region were distributed as follows: Ecuador (4), Honduras (4), Bolivia (3), Mexico (3), Argentina (2), Chile (2), Suriname (2), Dominican Republic (1), El Salvador (1), Guatemala (1), and Paraguay (1).

34 Indonesia received the third highest number of active instances of mineral governance work among the countries in our database with 14 hits.

North Africa region (Iraq) and Europe and Central Asia (Albania, Bosnia Herzegovina, Greenland, Serbia, Tajikistan, Ukraine, and Uzbekistan).

High-income countries are not just funders but also occasionally targets of mineral governance work

Recognizing that many of these contexts are not immune to the mineral governance challenges facing low- and middle-income counterparts, a few mineral governance funders reported the intention to support projects in high-income countries moving forward. As of now, however, within this category there is only one active instance of funding (in the US) in our dataset, leaving the remaining list still heavily concentrated in middle- and low-income countries.

Some funders are thinking beyond national borders to regional initiatives

Some funders, especially the regional development banks, are supporting **continental-level regional initiatives** like the application of the African Green Minerals Strategy, African Minerals Development Centre, the Association of Southeast Asian Nations' (ASEAN) work on the Minerals Development Action Plan 2045,[35] and the European Union (EU)-Inter-American Development Bank (IDB) Latin America and Caribbean Investment Facility. There also seems to be growing recognition that for certain countries, realizing the potential gains of mining value chains (especially around value addition), and avoiding harms, will greatly benefit from collaboration or coordination with neighbors. In this view, **subregional initiatives** connecting clusters of actors implicated in particular economic initiatives related to mining can allow countries involved to act collectively to realize better outcomes from mining than might be possible on their own. In response, a handful of funders are supporting policy and practical steps to enable more coordination and active cooperation across countries at a subregional level.[36] Alongside supporting inter-governmental coordination, funding is also going to regional advocacy to broaden and coordinate demand for certain good governance standards and practices, especially among civil society.

Efforts to work on mineral governance at the global level may be losing some ground to those unfolding in specific geographies

While global-level initiatives and actors were the focal point of much work on extractives governance in the past, there was a general impression among interviewees that there is relatively less support for such efforts now and looking ahead as funders are seen as beginning to favor efforts to work on or in specific regions or countries. As can be seen above, the current mineral governance activities from our sample still have global activities (we also counted 3 or more regions as global) featuring as the second highest geographic category (26%). However, some interviewees suggest this may be shifting in the near term or may already represent a relative decline from past levels (assessing these possibilities is beyond the scope of the current analysis).

35 ASEAN's first phase of its Minerals Development Action Plan 2045 is intended to "expand cooperation in upstream-to-downstream minerals development, promote sustainable practices and technology adoption, and build human capacity to foster responsible investment, production, and trade across the value chain," in Southeast Asia Development Solutions (SEADS) (October 17, 2025). "ASEAN Adopts Long-Term Vision for Sustainable Minerals Development."

36 For example: Initiatives to combat illegal mining in the Amazon region and a similar project to protect biodiversity in Central Africa's forests, efforts to foster environmentally and socially responsible mining among members of the Southern African Development Community and, separately, among countries in the Andean region, and work to combat the illegal gold trade in the Great Lakes Region.

Reflections

Beyond strict regional variation, interviewees shared reflections on other factors that can be considered when exploring the geography of mineral governance funding looking ahead.

Established vs. new producers

Many funders appear to favor countries with long histories of mining, hoping that these established producers will already have some institutional and societal foundations on which to build and improve mineral governance. This advanced starting point is seen as an asset. By contrast, a few funders described as "brave enough" (by one implementing party interviewee) to support efforts to improve mineral governance in countries like Brazil, Nigeria, and Uganda in developing new mining industries seemed to see inexperience as a potential asset. Proponents of working with these newer producers – or those newly involved in downstream activities[37] – argue that prospects of meaningful progress might be greater where there are minimal pre-existing institutional challenges and fewer entrenched interests to overcome. They describe the period when mining sectors are just being developed as a window of opportunity: a relatively "clean slate" on which to establish governance institutions, laws, and policy frameworks, and to create mechanisms imbued with up-to-the-minute knowledge on good sector governance practices. Some argue an analogous position with regard to the opportunities to start fresh with greenfield over brownfield mining projects. For those who are particularly interested in working on mineral governance reforms with new producers, there might be an opportunity to fund something analogous to the group set up for new petroleum producers over a decade ago to share insights and experiences across governments.

Magnitude of mining sectors

Another set of choices related to geography for mineral governance funders to consider is the scale of mining sectors in different countries. Some funders choose to be active in countries where the magnitude or diversity of mining raises the stakes for advancing good governance in those settings. Interviewees offered DRC and Indonesia as examples of mining countries that are too important to global mineral flows to ignore, arguing that if they are able to achieve some progress in those countries it will be amplified by the massive scale of their mining sectors. However, others in our discussions argued that funder resources can be more impactful in relatively smaller mineral producers like the Central African Republic, Malawi, or Uzbekistan where their funding might represent a relatively greater contribution to sector development and potentially be leveraged for greater effect than in countries with much more extensive mining activities.

Level of economic development

Funding for mineral governance through governments and multilateral development banks, as well as many foundations, has overwhelmingly been directed at middle- and low-income countries. However, some funders, including private foundations, have begun to point out that certain mineral governance challenges – for example, around community consultation and consent, anticipating and addressing environmental and social impacts of mining, health and safety concerns, benefit-sharing, and water

37 For example: Vietnam is becoming an emerging site for Japanese investment for rare earth element processing, see Baskaran, G. & Schwartz, M. (July 28, 2025). "Developing Rare Earth Processing Hubs: An Analytical Approach," Center for Strategic & International Studies.

scarcity[38] and use – also arise in some higher-income countries and therefore merit attention just as much as analogs in other parts of the world. Skeptics of this view contend that wealthier countries provide more opportunities and channels for mineral governance issues to be addressed and therefore should not be beneficiaries of the increasingly limited resources allocated to these issues.

Gaps

Specific regions

Middle East and North Africa (MENA) – Some respondents highlighted as deeply problematic the relative dearth of funding for mineral governance activities in the MENA region where there is significant existing and emerging mining activity as well as outbound mining investment.

Central Africa – Multiple people indicated possible gaps in support for efforts to improve mining governance in countries like Cameroon, the Central African Republic, Congo, and Gabon. Relatedly, one implementing party respondent pointed out that while global funder attention is focused on DRC's cobalt production, more attention could be usefully applied to "strengthening governance in surrounding copper-producing zones [of DRC, Zambia, and Northern Angola], especially around community rights and land-use conflicts."

Geographic units

Funding for subregional mineral governance initiatives – Multiple people noted that much more funding is needed for subregional mineral governance work (i.e., among neighboring states connected by a specific project or supply chain initiative rather than full continental regions) to support the deep levels of coordination required to work across countries to realize the benefits of specific potential value addition opportunities.

Conversation-starter questions on geographies of mineral governance funding

Which geographic gaps should most urgently be addressed? Why? Which funders are best positioned to act on this?

What is lost and gained when mineral governance funding shifts from global to national to subnational levels? What are the benefits of mineral governance work at each level?

Is it more strategic to support work in new or established producer countries? What are factors or attributes that might condition such decisions? Do some established producers pose more impediments to improving mineral governance reform than opportunities? Which types of funders might be particularly well positioned to fund new producers and what would be the most useful mechanisms for doing so?

Should some mineral governance funding be directed at high-income countries or should it remain largely focused on low- and middle-income settings? Why?

38 It is estimated that "some 50 percent of global copper and lithium production are concentrated in areas with water scarcity." UN Environment Program (February 19, 2024). "What are energy transition minerals and how can they unlock the clean energy age?"

3. Types of mining and minerals

Summary

Impressions: Types of mining and minerals being focused on

Current headlines

- Whole-of-sector mining dominant
- Funding for critical energy transition minerals (CETM) expanded greatly in recent years and now very significant
- Governance of large industrial mining much more common than artisanal and small-scale mining (ASM)
- Some mineral-specific pockets of activity, often for responsible supply chain initiatives
- Relatively little attention to frontier issues like deep-sea mining

Anticipated shifts

- Growing attention to CETM
- Less attention to whole-of-sector
- Potentially growing interest in (ASM) among a subset of funders, but still likely to be dwarfed by industrial mining
- No major anticipated shifts on frontier issues

Reflections: Concerns and tradeoffs with those choices

- Tradeoffs and operational concerns of shifting focus to CETM
- Industrial mining vs. ASM

Gaps: Types of mining with perceived need for greater attention

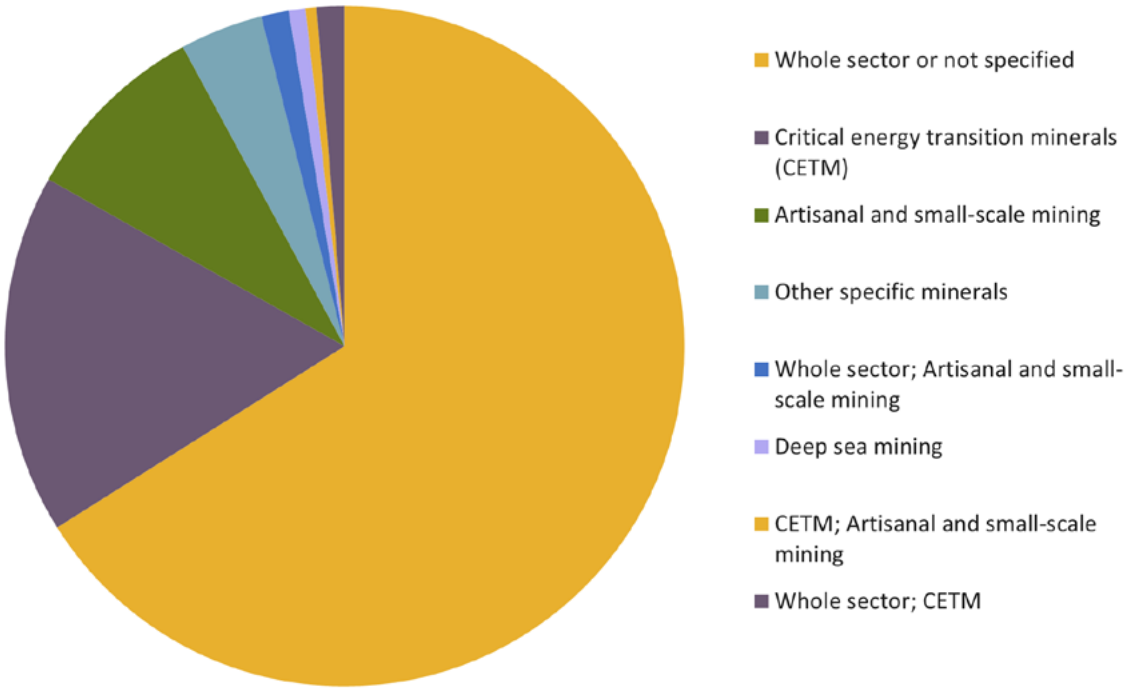
- Addressing end use issues
- Development minerals
- Frontier issues
- Consideration of greenfield vs. brownfield mining concerns
- ASM

Impressions

Differences among funder priorities – and particularly the impact of growing interest in climate action — can be seen in variations in the "slices of the mining pie" on which they focus. **Figure 4** depicts the currently-active mineral governance activities in our dataset, with whole-of-sector or not specified comprising the majority of entries,[39] followed by CETM, then ASM, and mineral-specific (such as diamonds, gold, or aluminium) projects, as well as a handful of activities focused on a combination of categories.

39 **Methodological note:** These two categories of entries are grouped together as we interpreted the lack of specification in a mineral governance project to apply to the whole of the sector, but in practice, this might not be the case. Therefore, in the absence of more publicly available information to make more precise determinations, it is worth noting that this category might be over-represented in the table.

Figure 4: Types of mining and minerals addressed by dataset of currently-active mineral governance activities



CETM is now very significant with its importance to funders likely to grow

Based on our interviews, there is an impression that mineral governance funding is moving towards overwhelmingly favoring CETM over whole-of-sector mining, an assertion at odds with the findings of current levels in the dataset. Given the methodological constraints discussed above, this could be a function of limitations of the data (including time lags between publicly available data and current and anticipated trends identified in interviews) or an overestimation bias among our sample of interviewees.

Either way, in recent years, this specific group of minerals has come to account for a significant segment of mineral governance funding, which many believe will continue to grow. Funders driven by global climate concerns and the reduction of emissions through the phaseout of fossil fuels in particular seem to focus exclusively on CETM.[40] One funder contended that most foundations working on mineral governance are converging on a focus on CETM, as have many other types of funders (including those that historically supported broader extractives governance work). Implementing parties seem to be mirroring these perceptions. Many organizations that historically worked on extractives governance or mineral governance broadly are now narrowing in on CETM, at least in part, in hopes of improving funding prospects.

40 These are "simply the minerals necessary to construct, produce, distribute and store renewable energy." Specifically, CETM "include the copper, cobalt, nickel, lithium, graphite, rare earth elements (REEs) and aluminium required for electric vehicles and battery storage; the silicon, cadmium, tellurium and selenium (to name a few) that build solar panels. Wind power requires copper. Hydropower uses copper too, and chromium, zinc and more aluminium," UN Secretary-General's Panel on Critical Energy Transition Minerals (September 11, 2024). "Resourcing the Energy Transition: Principles to Guide Critical Energy Transition Minerals Towards Equity and Justice."

Whole-of-sector continues to be prominent among some funders

Some funders continue to work on mining more broadly, arguing that regardless of the source of demand or intended use, there are important potential benefits to be pursued and very serious risks to be mitigated that exist for all mining countries and communities.[41] Indeed, the majority of existing projects captured in our dataset fall into this category. However, multiple interviewees anticipated a shift in some of these resources away from mining as a whole and towards CETM moving forward.

Funding for mineral-specific work exists in pockets

Though not numerous, some funders continue to support initiatives focused on one individual mineral – cases of these in our dataset often focus on gold mining, but there were also projects on granite, aluminium, diamond, bauxite, coal, and rare earth mining. In some instances this may be because that particular mineral is tied to a specific responsible supply chain initiative or in others, is the only type of mineral being mined in a particular country or region where the funder is active.

An ascending area of interest: artisanal and small-scale mining

While not necessarily bound to a specific mineral – although in practice historically concentrated in gold and gemstones and now increasingly cobalt, copper and potentially lithium, tantalum and tungsten – ASM is another type of mining that some funders are seeking to address through their mineral governance funding (the default for most funders is focusing on large-scale industrial mining). Multilaterals like the World Bank and the governments of Belgium, Canada, Germany, the Netherlands, and Switzerland (some via the European Partnership for Responsible Minerals) are among the funders active in this space. Their support often targets formalization and the mitigation of potential environmental and social harms (including deforestation, water pollution, and child labor). Our research suggests that, although not new issues, momentum behind this work seems to be growing among a small subgroup of funders and implementing parties (including the Intergovernmental Forum on Mining, Minerals, Metals, and Sustainable Development).

Few funders active on frontier issues

Although likely to be focused on CETM, and still at very early stages of development, deep-sea mining is a new frontier for industry, governments, civil society, academia, and funders.[42] We found only 3 current mineral governance activities related to deep-sea mining and no mention of deep-sea mining in the interviews. The 3 funders supporting those activities are Sweden, the World Bank Group, and Germany, with Sweden's grant close to US$4m and the others' nearer to half a million.[43] Only one instance of funding in our dataset was for supporting work squarely focused on the *governance of* circular mining efforts as an alternative to extractive mining and none focused on the governance of phytomining.

41 For one take on why it is vital to look beyond energy transition minerals and other minerals developed countries prioritize, see Daniel Franks' thoughts on why definitions of "critical minerals" should be expanded to include a "vast array of minerals, mostly invisible, that are essential to human development yet are falling short of meeting people's basic needs" in Franks, D. (2025), commentary on critical minerals. LinkedIn [accessed February 3, 2026].

42 For more on some of the jurisdictional complexities of governing deep-sea mining, see Blanchard, C., Harrould-Kolieb, E., Jones, E. & Taylor, M. L. (January 2023). "The current status of deep-sea mining governance at the International Seabed Authority." Marine Policy, Volume 147.

43 Sweden's activity is focused on Sub-Saharan Africa, the World Bank Group's is Global, and Germany's is East Asia and Pacific. Two projects are looking at environmental and social impacts while the third is directed at banning deep-sea mining throughout the Pacific region and beyond.

Reflections

Tradeoffs and operational concerns of shifting focus to CETM

As noted above, there seems to be growing emphasis on CETM among mineral governance funders as many orient, or plan to reorient, their funding around global climate priorities. However, two concerns were raised about this trend. First, as one representative of a multilateral development bank noted, a stark increase in focus on CETM can divert resources from much-needed work on other minerals. This person worried that governments and communities dealing with, e.g., gold, platinum or construction material mining, might be left behind without support to minimize harm and maximize benefits from these sorts of activities.

Second, and perhaps more vexing, is the so-called "end use challenge" for CETM that was raised by numerous respondents. Ultimately, it is very difficult to distinguish between minerals used for solar panels, wind turbines, or electric vehicle batteries from those used for other purposes like defense, healthcare, or advanced technological/AI/digitization purposes.[44] Overcoming these ambiguities could require more extensive tracking and more comprehensive and transparent supply chain management. Some civil society actors see such measures as too difficult and time-consuming to justify diverting resources from more immediate, mine-site level problems. However, because many funders are attracted to the prospects of linking mineral governance issues to climate action, the inability to track end uses might lead climate-oriented funders to step away from working on mineral governance issues altogether (rather than expanding to the broader industry or expending resources to illuminate end uses).

Large-scale industrial mining vs. artisanal and small-scale mining

In terms of the scale of mining projects, while large-scale mining tends to dominate mineral governance funding, some argue that ASM might be more important in improving human welfare in the short- to medium- term. According to a report published by the World Bank in 2024, ASM employed roughly 45 million people in 80 countries (compared to 7 million employed by industrial mining projects), a significant portion of which are women.[45] ASM has been associated with risks to occupational health and safety, income, and environmental outcomes. However, it also holds the possibility of reducing poverty by providing opportunities for some who might not otherwise have access to employment, including women, youth, low-skilled workers, and migrants.[46] At the national level, ASM has the potential to contribute to domestic revenues and can even make meaningful contributions to global mineral supplies.[47]

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44 For more on the varied uses of minerals falling into the CETM category, see Gupta, C. (October 30, 2025). "Critical Minerals Explained: Why They Matter for Geopolitics, Clean Energy and Tech." Harvard Kennedy School, Belfer Center for Science and International Affairs.

45 The European Partnership for Responsible Minerals (EPRM) estimates that ASM operations "are increasingly involved in producing other minerals, including manganese, copper, and lithium. In many high-risk and low-income regions, ASM serves as the primary source of non-farm income, supporting the livelihoods of over 225 million people worldwide." The European Partnership for Responsible Minerals (undated). [accessed February 3, 2026].

46 Arthur-Holmes, F., Yeboah, T., Cobbinah, I. J. & Busia, K. A. (September 2023). "Youth in artisanal and small-scale mining (ASM) and higher education nexus: Diffusion of innovations and knowledge transfer." Futures, vol. 152.

47 **For example:** The World Bank estimates ASM accounts for 20 percent of the world's gold supply, 12 percent of cobalt, and 80 percent of sapphires. World Bank Extractives Global Programmatic Support (EGPS). (September 16, 2024). "Achieving Sustainable and Inclusive Artisanal and Small-Scale Mining (ASM): A Renewed Framework for World Bank Engagement." World Bank.

How ASM is governed will go a long way in determining the extent to which risks are mitigated and benefits realized for tens of millions of households across the globe, which is why some believe greater funding for ASM governance should be a high priority among mineral governance funders (although noting that one of the top 15 largest funding packages is a €14.9m European Commission case focused on CETM and ASM). One interviewee wondered if, despite its importance, perceptions of ASM as a particularly difficult issue to take on – highly localized, lacking good data, and often implicating vested interests/political elites – leads funders to favor large-scale mining. A response from those focused on large-scale mining to support rapid global energy transitions might be that while this sort of funding might not impact the welfare of those directly involved as extensively as ASM, the contributions to mitigating the climate crisis might have exponentially broader indirect impacts on wellbeing across the globe.

Gaps

Purpose of mining

Addressing end use issues – Per the discussion above in *Tradeoffs and operational concerns of shifting focus to CETM,* one interviewee described the end use challenge as a pressing gap, particularly in the context of trying to engage climate-focused foundations on mineral governance issues. While many view comprehensive traceability regimes as impracticable, it may be worthwhile to devote some attention to considering what alternatives might exist.

What is being mined

Development minerals – Defined as, "minerals and materials that are mined, processed, manufactured and used in industries such as construction, manufacturing, and agriculture,"[48] these materials – e.g., sand, gravel, crushed stone, limestone, and gypsum – represent the largest segment of mining by tonnage.[49] This kind of mining can have extensive environmental and social impacts and are a major ASM activity and yet development minerals seem to receive little attention from mineral governance funders or implementing parties.[50]

How mining is taking place

Frontier issues – Deep-sea mining was identified as a key gap. One interviewee worried that funders and grantees have been too slow in acknowledging the importance of this type of mining, imagining these issues to be farther in the future than the 2-3 years away this person anticipates. Another person mentioned the importance of trying to anticipate and address potential governance concerns related to *phytomining*.

48 The definition, and more on development minerals, can be found at "Empowering Livelihoods through Development Minerals." ACP-EU Development Minerals Programme. [accessed February 9, 2026].

49 European Commission (2025). "Construction Materials." [accessed February 1, 2026].

50 Only 2 grants in our database focused on these minerals. One, the "ACP-EU Development Minerals Programme, implemented in partnership with UNDP, works to improve livelihoods and inclusion of artisanal and small-scale miners (ASM) working in Development Minerals value chains in African, Caribbean and Pacific (ACP) countries. The Programme is developed jointly by the Organisation of African, Caribbean and Pacific States (OACPS) and the European Union (EU) and is funded under the 11th European Development Fund (EDF)." See "Empowering Livelihoods through Development Minerals." ACP-EU Development Minerals Programme. [accessed February 3, 2026].

Greenfield vs. brownfield mining – This distinction in types of mining projects, and specifically the different governance challenges and opportunities each involves, was raised by a few interviewees as highly important but widely under-appreciated.

Funding for ASM – Multiple interviewees argued that while the visibility of ASM issues is definitely increasing, funding for work on ASM remains far too limited. One implementing party respondent argued that beyond ASM formalization, there is insufficient funding for work focused on social protections, elimination of child labor, and improving ASM-driven local development prospects.

Conversation-starter questions related to types of mining/minerals

Is focusing on CETM practically feasible in light of ambiguities around end use? If not, what would it take to minimally address end use concerns to make this possible? Even if feasible, is a CETM focus strategically wise?

Should ASM be getting a larger portion of total mineral governance funding? Why? Which funders are best aligned – in terms of priorities but also capacities – to support work on ASM?

4. Thematic focus areas

Summary

Impressions: Themes being focused on

Current headlines

- Support for work categorized as addressing environmental and social impacts of mining most commonly reported by funders in our sample
- National economic development a high priority for many funders
- Open governance a significant priority for some funders
- Mineral-related armed conflict or "conflict minerals" currently receiving very little attention from funders

Anticipated shifts

- Dramatic increase in attention to national economic development issues
- Decreasing funding for open governance
- Continued high levels of commitment to funding for environmental and social impacts, with different funders favoring some aspects and populations over others
- No indications that funding for work on mining-related armed conflict or conflict minerals will increase from current low levels
- Mitigation of direct global climate impacts of mining is slowly emerging as an area of interest among a small group of funders

Reflections: Concerns and tradeoffs with those choices

- The fate of open governance work
- Variation in thinking about environmental and social impacts
- A few cautions about focusing on mining as an engine of growth

Gaps: Themes with perceived need for greater attention

- National economic development: Government capacity support at all levels, pursuit of gains beyond value addition, governance of midstream/downstream mining issues
- Open governance: Anti-corruption, transparency of bilateral trade and investment agreements, various civic space concerns
- Environmental and social impacts: Community capacity, nature and focus of engagement mechanisms, psychological and physical tolls of mining

Impressions

There are many possible ways of categorizing the types of mineral governance themes funders might support. **Figure 5** sets out the typology used in this analysis, based on discussions with interviewees, surveys, and the authors' own assessments. It designates 5 overarching thematic categories—namely, open governance, national economic development, global climate goals, mineral-related armed conflict, and environmental and social impacts—and highlights some of the focus areas within each. As with any typology of social phenomena, these categories are not strictly mutually exclusive and there can be some overlap.

Figure 5: A categorisation of efforts to support mineral governance by thematic focus area

National economic development (via mining and/or value addition)

- Financing and investment promotion
- Conducive legal and policy environment (mining and investment laws, policies, regulatory frameworks, etc.), including relevant industrial policy
- Local content
- Institution building
- Revenue collection/taxation/royalties
- Revenue management/distribution

Open governance

- Sector transparency
- Sector accountability
- Participatory governance mechanisms (including protections for civic space to enable participation)
- Anti-corruption measures

Global climate priorities

- Measures to ensure a stable supply of responsible CETM
- Demand reduction
- Mine decarbonization efforts

Conflict minerals[51]

- Mitigating risks of mining contributing to armed conflict
- Mitigating supply chain risks of conflict-affected and high risk areas

Environmental and social impacts

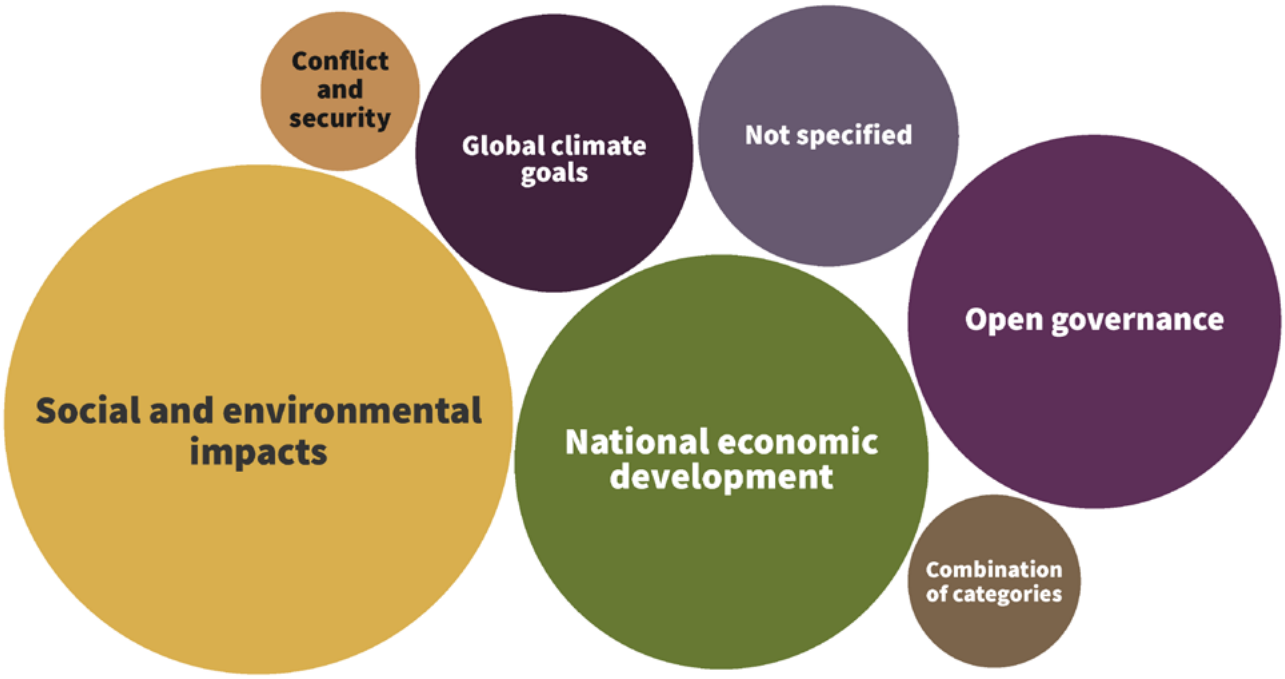
- Environmental
  - Protections for air/water/soil quality
  - Protections for local ecosystems/biodiversity/nature[52]
  - Water use considerations
- Social
  - Land rights protections
  - Community voice and empowerment measures, Indigenous peoples' and Afro-descendant peoples rights
  - Community benefits (community benefit-sharing, community development agreements, co-ownership models/equity participation, shared energy access)
  - Community engagement mechanisms (including around consultation, consent, decision-making, grievances)
  - Labor rights protections for mine workers
  - Mine health and safety standards and practices
  - Gender, equality, disability, and social inclusion (GEDSI)

51 In this paper, "conflict minerals" refers to mining-related activities that contribute to the financing of armed conflict or that take place in conflict-affected and high-risk areas. According to the OECD, "Conflict-affected and high-risk areas are identified by the presence of armed conflict, widespread violence or other risks of harm to people. Armed conflict may take a variety of forms, such as a conflict of international or non-international character, which may involve two or more states, or may consist of wars of liberation, or insurgencies, civil wars, etc. High-risk areas may include areas of political instability or repression, institutional weakness, insecurity, collapse of civil infrastructure, and widespread violence. Such areas are often characterised by widespread human rights abuses and violations of national or international law. OECD (2016). "OECD Due Diligence Guidance for Responsible Supply Chains of Minerals from Conflict-Affected and High-Risk Areas," third edition.

52 For example: Mining's impact on particular types of ecosystems potentially includes forests, biodiversity areas, conservation corridors, bodies of water, and transboundary landscapes.

Figure 6 shows the distribution across thematic categories as coded in the dataset.

Figure 6: Circle chart of active mineral governance activities in dataset broken down by thematic area (up to 2 allowed per activity)



However, when looking at the top 15 largest activities dedicated exclusively to mineral governance, and allowing for up to 2 substantive topic category hits per activity, outcomes were skewed heavily towards national economic development. Within this subgroup of major instances of funding, support for work related to social and environmental impacts remains important, while open governance work is less represented than in the broader sample.

Funding for national economic development now seems to be the center of the action

Based on our coding of thematic categories, national economic development accounts for around 22% of thematic focus area hits in current mineral governance activities, making it the second largest category after social and environmental impacts, which came in at roughly 33% (discussed below).[53] But looking ahead, the single most striking area of agreement across the majority of funders and implementing parties interviewed for this analysis was the anticipation of a major reorientation in focus of mineral governance funding towards national (and at times subnational) economic development priorities of producer countries. In other words, considerable funding will be directed towards opportunities to increase national economic gains from mining and mineral supply chains.[54]

53 **Methodological note:** We allowed up to 2 substantive topic category hits per activity, including a "combination of categories" option.

54 The vast majority of funders and a substantial group of implementing parties we interviewed about current and forward-looking priorities mentioned focusing on some aspect of this category of themes.

Supporters of this kind of work emphasize the importance of efforts to 1) increase government resources, including via an extensive push around financing and supporting governments in attracting quality investment and 2) increase government capacity to pursue greater value addition and other opportunities to capture more of the economic and related gains from mining[55] for producer countries. This emphasis on value addition is in contrast to longstanding patterns involving low- and middle-income countries exporting cheap raw materials only to have other countries reap the benefits of downstream activities including smelting, processing, and refining.

Unsurprisingly, this type of funding is popular with funder governments seeking to shore up mineral supplies and diversify supply chains as well as with producer governments seeking assistance to leverage their countries' mining sectors for greater economic gains. But even some organizations that have long worked on extractives governance issues through a human rights or open governance lens are now evolving their focus to include national economic development issues, albeit often from a perspective emphasizing economic justice and equity.

Support for open governance work appears to be declining significantly

Funders and implementing parties seem to be in broad agreement that there has been a significant decline in funding for work on open governance issues. These include sector transparency, participatory governance, accountability mechanisms, and the anti-corruption agenda at which these efforts were often directed. Historically a key focal point of the extractives governance field, funders and implementing parties alike noted how relatively little mineral governance funding is being allocated to this work now.[56] As a result, those implementing parties focusing on various aspects of open governance – and there were several in our research continuing to underscore the importance of these issues at the global, national, and subnational levels – are facing a rapidly-shrinking pool of funders. Moreso, certain areas of work[57] are experiencing potentially existential funding drop-offs with the withdrawal of key funder governments and philanthropic patrons.[58]

Many funders are supporting measures to address environmental and social impacts of mining, but with important variation across approaches and specific themes

We explore the category of environmental and social impacts in greater depth than the other themes. This is due to 1) the frequency with which this category arose in our dataset, interviews, and surveys and 2) the deep variation and complexity of issues falling within this very broad category.

Various funders with whom we spoke see mineral governance support as helpful for unlocking a range of benefits for mining-affected communities and even for some of the more vulnerable

55 **For example:** Revenues, jobs, local content opportunities, investment opportunities, infrastructure, energy access, etc.

56 During the course of our interviews, there were very few mentions of corruption or transparency, seemingly ubiquitous buzz words of the field for over 20 years, see examples throughout Eisen, N., Kaufmann, D., Heller, N., Whitt, J. P., Picón, M.G., Bassetti, V. & Hudak, J. (June 2020). "The TAP-Plus Approach to Anti-Corruption in the Natural Resource Value Chain." Leveraging Transparency to Reduce Corruption (LTRC), The Brookings Institution.

57 **For example:** Beneficial ownership transparency was an example raised by two interviewees.

58 Funders in our sample who continue to support open governance work are doing so via pathways such as: supporting global initiatives and standards (particularly the Extractive Industries Transparency Initiative); integrating transparency, accountability, and participatory principles into country-level mineral governance engagements (e.g., around taxation, revenue mobilization, and revenue management in hopes of preserving more of the benefits of mining for national priorities of producer countries); promoting integrity in government, marketplace, and community engagements; and tracking illicit financial flows related to the mining sector.

groups within these. However, among numerous implementing parties, there are concerns that "the rapid and unregulated expansion of transition mineral extraction is exacerbating corruption, human rights abuses, environmental devastation, and socio-economic inequalities" as one survey respondent put it.[59] In response to such hopes and concerns, a wide array of funders have been engaging on environmental and social issues, often focusing on specific aspects of these. Across categories, activities may be directed at: improving prospects for the realization of benefits from mining for various populations; preventing and mitigating harm; setting up processes for remedying prospective harm; or targeted remediation for existing harm.

The 163 hits for the "environmental and social impact" category in our dataset[60] and the 15 further activities under "combination of categories" that included a social or environmental impact component, reveal a rich ecosystem of approaches seeking to address the many ways that mining can impact people and the environment. Many reflect the inherent connection between social impacts and environmental impacts and so link the two. Others focus on one or another aspect of either environmental *or* social impacts (see Figure 5 for illustrative examples). Interventions within this thematic focus area target a wide range of **entry points**, including:

- **Broader supply chain initiatives** – Supply chains and value chains using mandatory human rights and environmental due diligence (MHREDD) requirements, global standards, certification schemes, economic empowerment opportunities (e.g., microfinance, micro, small, and medium enterprises (MSMEs), associations).
- **Project-level engagements** – Focusing interventions on specific mining projects or regions where mining is taking place (e.g., impacts of mining operations on air, water, and soil quality, as well as on biodiversity and ecosystems).
- **Specific moments in the mining lifecycle** – Narrowing in on particular points of the mining lifecycle,[61] such as:
  - pre-licensing consultations and impact assessments,
  - financing requirements (e.g., one of the major development banks mentioned recently integrating biodiversity protections into their requirements for financing),
  - environmental safeguards or health and safety conditions for implementation of specific projects,
  - benefit sharing or job creation during operational stages,
  - measures to responsibly undertake mine closure and remediation.
- **Existing openings** – Building on active global or regional events or platforms (e.g., World Bank Group and IMF Annual Meetings, COP, G20, Mining Indaba, Future Minerals Forum).

In terms of **who** is the focus of efforts on social impacts, particular populations or subgroups of "communities" are sometimes specified. **Indigenous peoples** were referenced in 17 activities

59 For more on the potential contributions of mining to inequality, see Kemp, D. & Owen, J. R. (September 2025). "Global mining and the production of inequality: a case for continued inquiry." World Development Perspectives, vol. 39.

60 **Methodological note:** The maximum number of hits per activity was 2, otherwise the category received a "Combination of Categories" listing.

61 For a mapping of the phases of mining project lifecycles, from an investment perspective, see Resource Capital Funds. "Phases of Mining." [last accessed February 3, 2026].

(4% of the total) in the dataset. Funding for this population variously focused on advancing equal representation and participation, capacity-building, networking, organizing, and advocacy to pursue priorities such as Indigenous rights and Free, Prior and Informed Consent (FPIC), protections for Indigenous environmental defenders, and combatting illegal mining in Indigenous lands. There were no references in the dataset to Afro-descendant peoples (as a distinct group with emerging rights, especially in Latin America and the Caribbean)[62] or customary communities[63] (communities that do not fit the strict requirements of Indigeneity but who live under customary law with deep connection to their land, among other important cultural and spiritual beliefs and ties).

Within broader groupings – whether mining-affected communities, Indigenous peoples, Afro-descendant peoples, customary communities, or other – women, youth, people with disabilities, and other sub-groups commonly can have distinct experiences of mining activities. In the dataset, 44 activities (12% of the total) specifically mention **women or gender**[64] while only 4 activities were addressing issues related to impacts on **children**.[65] Nine activities (2% of the total) in the dataset specifically reference **youth**.[66] No activities in the dataset referenced **disability**. An implementing party survey respondent argued that, despite the fact that "people with disabilities living in mining areas struggle to access certain basic social services due to a lack of infrastructure adapted to their needs," they remain largely overlooked and excluded from mineral governance decision-making and benefits. For those funders hoping to support the most vulnerable populations in realizing the benefits of mining and avoiding harm, these subgroups may merit further attention.[67]

Global climate priorities directly tied to mining may be growing in emphasis

As more climate-focused foundations turn their attention to mineral governance space and other funders increasingly foreground climate concerns in their portfolios, issues at the intersection of global climate priorities and mining seem to be making their way into mineral governance funding and practice. These issues represent roughly 10% of hits in our database and often are discussed in terms of managing the impacts of how the energy transition's mineral demands are met (or decreased) or reducing emissions on the supply side. We explore these issues more below in *Spotlight: Specific considerations for funders focused on global climate priorities*.

62 See, e.g., Rojas Dávila, R. (December 2018). "Afro-Descendants as Subjects of Rights in International Human Rights Law." International Journal on Human Rights, Issue 28.

63 See, e.g., Wicomb, W. & Smith, H. (2011). "Customary communities as 'peoples' and their customary tenure as 'culture': What we can do with the Endorois decision," African Human Rights Law Journal, vol. 11, n. 2.

64 These cases vary significantly in the specificity of the gender-related action – ranging from more generic references to protection of women's rights, centering gender, gender equality, and gender-responsive, inclusive or sensitive practices (e.g., businesses, value chains, policy, peacebuilding) to more specific work on women's labor rights (including health and safety), economic or other empowerment, challenges in the mining context, jobs for women, leadership and organizations, challenging restrictive norms, equal representation and participation, gender-based violence, justice and mining royalties, and land rights.

65 All the examples in the database focused on child labor and none on other potential health, well-being, or educational impacts. For more on potential impacts of mining on children's health, see, e.g., Cossa, H., Dietler, D., Macete, E., Munguambe, K., Winkler, M. & Fink, G. (2022). "Assessing the effects of mining projects on child health in sub-Saharan Africa: a multi-country analysis," Global Health, vol. 18, article 7; and on the complex relationship between mining and children's education, see, e.g., Guirkinger, C. & Stoeffler, Q. (January 21, 2026). "New Economic Opportunities and Children's Outcomes: Negative Effects of Artisanal Mines on Primary Education." The World Bank Economic Review; and Prada, H. & Omar, L. (2024). "Sweet child o'mine: The impact of mining on educational and labor market outputs," Colombia IAI Discussion Papers, no. 256, provided in Cooperation with: Ibero-America Institute for Economic Research, University of Goettingen.

66 These focused on their labor rights, jobs, challenging restrictive norms, organizations to support youth, economic empowerment, and equal representation and participation.

67 **For example:** Implementing party survey respondents emphasized that not only are community engagement mechanisms and related corporate social responsibility policies generally lagging in practice but women, youth, and people with disabilities are consistently excluded.

Early focus on "conflict minerals" seems to have receded significantly

Two key ways that mining and conflict potentially intersect is through the **contributions of mining to conflict** and the particular **challenges for mineral supply chains posed by conflict-affected and high-risk areas**. Yet, despite the fact that "conflict minerals" and "blood diamonds" were very prominent during the inception of the extractives governance field almost three decades ago,[68] relatively few funders are currently supporting work on conflict-affected and high-risk areas. Looking towards the future, only one interviewee mentioned the importance of conflict minerals (and that person underscored it as a gap not a priority). Of the 16 instances of funding related to this thematic area identified in the dataset, 5 supported the Kimberley Process Certification Scheme, 8 focused on responsible mineral practices or supply chains involving mining in conflict-affected and high-risk areas (for example, the EU Regulation 2017/821[69]), and 3 focused on armed conflict in areas where ASM occurs.

Reflections

The fate of open governance work

A common refrain amongst interviewees was that "transparency for the sake of transparency" (and open data without supportive infrastructure and for a specific purpose) is no longer a priority for funders. There appears to be a pessimism among some funders about 1) it becoming more difficult to "sell" open governance work to political leaders and domestic publics in donor and producing countries and 2) the prospects of success in shifting governance outcomes through open governance pathways in light of global trends towards democratic backsliding and the rise of more authoritarian behaviors among leaders across the globe.[70] With no powerful domestic constituency demanding support for work on these issues, many ODA agencies and foreign offices have turned attention and resources elsewhere, namely to investment promotion and pursuing diversification and stability of mineral supply chains. Moreover, one interviewee from a government funder argued that open governance work tends not to be amenable to the "win-win" scenarios that many leaders are now seeking through their mineral governance funding.

Another explanation offered by a few interviewees for the deprioritization of funding for open governance work is the perceived underperformance of existing interventions in the extractives governance field.[71] However, multiple proponents of open governance work argue that the problem

68 Seminal pieces by Global Witness, Human Rights Watch, the Enough Project, and others precipitated work on conflict minerals, including the inception of the Kimberley Process Certification Scheme. See, e.g., Global Witness (December 1, 1998). "A Rough Trade: The role of companies and governments in the Angolan conflict."; Global Witness (July 6, 2004). "Conflict in Congo will persist unless natural resources are controlled."; Human Rights Watch (June 1, 2005). "The Curse of Gold: Democratic Republic of Congo."; and The Kimberly Process (KP).

69 Regulation (EU) 2017/821 of the European Parliament and of the Council of 17 May 2017 laying down supply chain due diligence obligations for Union importers of tin, tantalum and tungsten, their ores, and gold (collectively referred to as 3TG) originating from conflict-affected and high-risk areas.

70 These dynamics often manifest themselves in a variety of ways that make open governance efforts more challenging but also riskier to those on the ground, including the contraction of civic space, less government responsiveness to their broader populations, threats or violence against human rights and environmental defenders, etc.

71 **For example:** Critics cite limited evidence of transformative progress on improving outcomes around accountability and corruption despite significant investments by various funders. Making this point, a few interviewees argued that the implicit theory of change underlying global anti-corruption efforts grounded in transparency standards too often fell apart at the country level, where even when there were revelations of corruption, the subsequent responses (or lack thereof) from civil society or government failed to translate into meaningful repercussions or governance changes. Proponents of open governance work typically respond that expectations for transformative governance changes and outcomes from this work are unreasonable and require much longer timelines for effects to be realized.

is not a lack of progress but the fact that progress on these issues is difficult to measure and demonstrate (especially within relatively short timeframes). For them, the practical implication is that there is a need for better ways to measure progress from open governance work; not less of this kind of work (see also the discussion on *Prospects for impact* in *Key factors shaping funding flows* below).

Several people raised concerns about an "overcorrection" when it comes to open governance work and advocated for the continuation of attention and resources for these issues.[72] A mix of funder and implementing party interviewees and survey respondents worried that sidelining or abandoning these issues altogether jeopardizes both the prospects of future mineral governance efforts delivering intended benefits and also the existing gains made through this work over the last two decades. From this perspective, open governance is not competitive with other areas of work but, rather, integral to their success.[73] As one person described it, "open governance issues [are] essential for the achievement of the kinds of equitable economic development objectives described above, but too often funders treat them as abstract or separate from those goals."

Variation in thinking about environmental and social impacts

Our research suggests that there may be two broad orientations when it comes to supporting work on environmental and, particularly, social impacts. One emphasizes **opportunities to maximize benefits from mining** while the other is focused more on **elevating community voices and decision-making power.**

The first of these two orientations tends to implicitly assume mining is desirable or inevitable and focuses on efforts to foster "**responsible**," "**good**," "**clean**," or "**green**" **mining** – concepts around which, it is worth noting, there are no common definitions nor widely agreed-upon implementation standards. Nonetheless, at a general level, activities or projects falling in this category often focus on 1) expanding benefits to communities and 2) reducing or mitigating environmental and social harm. This might involve funding work on improving benefit-/revenue-sharing arrangements or community development agreements, job creation, local procurement opportunities, access to shared infrastructure (including energy systems), and/or standards and due diligence to identify and avoid specific mining-related risks.[74]

The second broad approach is agnostic to whether or not mining and related activities will or should proceed. Rather, it prioritizes support for the empowerment of those most directly impacted by mining and mineral supply chains to define, voice and advance their respective interests and preferences. This might involve supporting opportunities, information and capacity

72 **For example:** By supporting transparency across the lifetime of mining projects and mineral supply chains, for oversight and other measures to support corporate and government accountability, and for participatory decision-making processes giving a range of stakeholders greater say in sector-related decisions.

73 **For example:** Some respondents worry that mining deals and contracts are being signed without public awareness of the terms and futures they are laying out – who will benefit, how will projects be run, what will be the impacts on communities and the environment, and what will be options for recourse in the event of problems arising. The catalogue of worries expressed included: that civil society and communities will be hamstrung in advocating for their rights without access to project-related information, participatory decision-making fora, and accountability mechanisms designed to deliver responses to their concerns; that back-room deals and opaque revenue collection and management processes ripe for corruption and mismanagement might dash hopes for national economic gains and local benefits; concern about the credibility of supply chain initiatives without strong, transparent mineral tracing; that projects are being developed without clarity on who the ultimate owners are to be held accountable; and that without funding, existing systems and mechanisms developed to advance more transparent and accountable mineral governance will collapse and increase the prospects of the preceding fears coming to pass.

74 **For example:** Human rights abuses, health and safety issues, environmental harm, etc.

of relevant actors to exercise **community voice in key mining-related decisions**, meaningfully engage in **formal consultation or participatory decision-making processes**, or pursue other opportunities to **influence relevant government or corporate actions** that impact their interests. The principle of FPIC is a core component of this approach, which was favored by many of the implementing party survey respondents and interviewees in our sample.[75] The community empowerment focus implicitly opens the door for the exercise of power to reject mining projects.

Some proponents of the first approach appear hesitant to support the second because they fear that the latter may work against the speed and certainty of mining, requiring up-front investments of time, and potentially resulting in projects being delayed or even derailed altogether.[76] Among the funders we interviewed, only a handful of private foundations that emphasize human rights and social and environmental justice have made community empowerment, participation, and voice the centerpiece of their mineral governance portfolios. However, these funders (and several implementing parties) point out that there might be a false economy in other funders avoiding these issues for fear of the uncertainty or delay they are anticipated to create. They argue that by failing to devote adequate time and resources to building trust with communities, addressing community demands,[77] and considering potential environmental impacts from the earliest days of exploration, those actors who support rapidly expanding mining[78] potentially sow the seeds of problems down the line. If such sidelining alienates communities or impedes adequate environmental impact assessments and planning, costly problems can emerge[79] that contribute to delays, interruptions, and even mine closures.[80] When these occur, they undermine longer-term stability and security of mineral flows.

In light of such concerns, a few interviewees underscored that bringing the two approaches together – supporting community voice in key decisions related to mining and applying rigorous environmental standards *and* helping communities reap more benefits from mining (should they choose to proceed) – is the key to improving mineral governance and ensuring that, where mining or processing does take place, it is undertaken in ways that contribute to stable and responsible mineral supply chains. Interestingly, one long-time civil society advocate noted that, in some cases, because of their deep experience, mining companies seem more sensitized than many governments and some foundations to the need for community buy-in for the long-term success and productivity of their projects. This signals both the need for better education of certain funders on the importance of these issues and also a potential opportunity to build on company interests.

A few considerations for those focusing on mining as an engine of growth

Various interviewees – often drawing on insights from decades of lessons in the broader development community – weighed in on factors that could improve the performance

75 For more on FPIC and mining, see O'Faircheallaigh, C (2021). "Negotiated Agreements, Indigenous FPIC, and the Mine Life Cycle," in Odumosu-Ayanu, I. T. & Newman, D., Indigenous-Industry Agreements, Natural Resources and the Law. (Routledge).

76 **For example:** One of the funders supporting gender-related mineral governance work mentioned seeing some pushback on gender-related topics, as well as other regulation and due diligence requirements as mining proponents – funders and implementing parties – seek to fast-track approval processes.

77 **For example:** Regarding land use planning and no-go zones.

78 **For example:** By expediting permitting and approval processes.

79 **For example:** Environmental disasters, strikes, conflicts, blockades, and physical damage, etc.

80 An interviewee offered the example of the Cobre Panamá copper mine debacle to illustrate this very real risk in Stott, M. & Hook, L. (February 21, 2025). "What an idle copper mine in Panama says about the green transition," Financial Times.

of governance efforts focused on bolstering mining's contribution to national economic development. Multiple people underscored that in many countries there are significant **technical and administrative gaps** – around everything from digitized cadastral systems to tax and public financial management systems, from industrial policy to environmental oversight and management – that would need to be filled to help achieve the goals of producer governments, including around greater value addition. They also argued that the efficacy of national efforts to develop mining-related activities would benefit from attention to the ways in which linkages with activities in other thematic categories might influence outcomes of this work.[81]

Others suggested that those hoping to help improve national economic development keep a mindful eye to:

- **Political viability, including buy-in and support from powerful actors who can shape the fate of funding for national economic development.** Where powerful actors in government and beyond are supportive of the reform agenda in question, prospects of success are likely to be improved. Conversely, entrenched interests and inauspicious political settlements can fundamentally undermine selection and implementation of good policies and governance practices needed to develop and sustain reliable and responsible supply chains.
- **Expectation management**, especially in contexts where extractive potential might be high but the capacity for greater value creation[82] is very low or inconsistent across government and would take significant time and resources to build incrementally.
- **Ensuring that national economic growth is inclusive** and actively avoiding the exacerbation of inequalities by concentrating benefits in the hands of a few while subjecting certain populations to a disproportionate burden of costs or harms.

Gaps

National economic development

Capacity and technical support for governments at all levels – Some interviewees called for the need for more resources to address national-level capacity gaps including around domestic revenue mobilization,[83] fiscal policy, and revenue management. Multiple interviewees also felt that much more funding is needed to help bolster the capacity of subnational governments and municipal authorities who can often play a crucial role in mineral governance.

Thinking beyond value creation – One interviewee noted that inadequate attention was being paid to the ways in which countries ill-suited for value creation might otherwise improve their benefits from mining (e.g., through improvements to revenue and tax collection systems).

Midstream and downstream mining governance – A few people mentioned that while upstream issues were receiving the bulk of mineral governance funding, more resources and

81 **For example:** How corruption and handling of environmental and social impacts could shape the outcomes of the projects being financed and the global supply chains relying on them.

82 **For example:** Capacity to develop long-term mineral development strategies/plans, attract requisite financing, access requisite technology, develop infrastructure to support downstream activities, collect and manage revenues effectively, and coordinate key actors and activities

83 The person who shared this point offered this resource on domestic resource mobilization: The Addis Tax Initiative (ATI). Domestic Revenue Mobilisation Database. [accessed February 3, 2026].

attention are needed to midstream and downstream activities that equally affect the ultimate outcomes of mining and mineral supply chains.

Open governance

Anti-corruption efforts – Numerous funder and implementing party interviewees and survey respondents worried about a steep drop-off in resources for anti-corruption efforts related to mineral governance. They feared that, when coupled with massive resources being directed to project development, the result would be an eruption of corruption and, ultimately, weakened global mineral supply chains. Therefore, they see an urgent need to preserve and deepen funding for anti-corruption.

Transparency of bilateral trade and investment agreements – Some implementing parties, often working at the national level, underscored the need for more support to shed light on the opaque and asymmetrical bilateral trade and investment agreements being signed between high-income countries and resource-rich middle- and low-income countries. Otherwise, they fear these agreements could exacerbate historic asymmetries in benefit realization and enable the avoidance of various social, environmental, financial, and political safeguards.

Protection for human rights and environmental defenders – Various implementing parties who are concerned about both the frequency and severity of threats such actors can face around mining issues[84] pointed out there is insufficient support to try to protect these actors.

Strategies to deal with violent coercion – Another person mentioned the need for deeper thinking and resources to address problems emanating from well-financed, powerful actors willing to use force to exert control over mining territories.

Capacity and freedom of CSOs to monitor mineral governance – A survey respondent and an interviewee from an implementing party observed a gap around the resources required for CSOs to monitor mineral governance in hopes of ensuring that commitments, policies, and laws are being implemented properly.

Environmental and social impacts

Adequate resources for communities facing mining – Multiple implementing parties flagged that community-level actors need a range of resources, capacity support and access to relevant information in order to effectively engage on mineral governance issues. At a general level, it was pointed out that while support for community capacity to engage on mineral governance issues appears to be increasing in absolute terms, it is not nearly keeping pace with the rate of expansion of mining.

Ongoing company-community engagement mechanisms – A number of interviewees noted an absence of such mechanisms that would operate throughout the lifetime of a mining project – from exploration through closure and decommissioning (including grievance and redress mechanisms for communities and environmental groups). Several implementing parties and a few funders pointed out that community engagement starts too late, that is, when the decision to extract has been made and projects are moving from exploration to licensing, precluding the possibility of, e.g., designating no-go cultural and environmental

84 One implementing party survey respondent stated, "Land defenders, women activists, and Indigenous leaders who resist extractive projects face systemic criminalization, harassment, and violence, often perpetrated by state and corporate actors seeking to silence dissent and suppress opposition to destructive mining projects."

zones. Others were concerned about the relative lack of funding for post-mining planning, independent monitoring and enforcement of measures to address impacts of mine closure, decommissioning, waste disposal, environmental restoration, and water stewardship.

Work on non-Indigenous mine-affected communities – While some funders may be channeling resources to community-level actors, including Indigenous Peoples, various implementing parties indicated fears that certain groups that are particularly vulnerable to the social and economic risks of mining remain poorly supported. These include farmers and fisherfolk whose livelihoods are threatened by mining.

Efforts to support marginalized sub-groups – Various people noted the need for more attention to some of the most marginalized subgroups who may experience outsized negative impacts of mining, including women, people with disabilities, youth and children, and those living in extreme poverty, and the amplification of challenges at the intersection of these.[85]

Measures to address the physical and psychological tolls of mining – Two different experts working with mining communities, from civil society and private sector perspectives respectively, noted that the day-to-day psychological toll on community members of simply living with mining[86] is crucially important to affected communities, but is overlooked by many funders. Interlinked with this is the physical toll of living near a mine, which varies depending on what is being mined and how, but can include respiratory and cardiovascular illnesses, as well as birth defects, and exposure to toxic chemicals including mercury and cyanide.[87]

Conversation-starter questions on the themes you focus on

Who are the most likely beneficiaries of work focused on national economic development? How can funders help ensure that capture by political and economic elites does not derail national economic development plans or opportunities for more equitable realization of benefits across the broader population?

How can funders balance the push for national economic development with safeguards for social and environmental outcomes – especially under pressure for rapid mining expansion?

Is there a case for funders to continue supporting work on open mineral governance? If so, what is it and what types of open governance work or priorities should funders be supporting? What types should they be de-emphasizing? What are the most important lessons from past efforts that should inform such decisions?

What practical steps can ensure meaningful community engagement and FPIC throughout the mine lifecycle and not just at the licensing stage? How can this approach be reconciled with energy transition timelines?

85 One implementing party survey respondent described part of this gap as follows: "Empowerment of women and young people in mineral value chains – beyond surface-level training or token representation – remains poorly funded, despite their disproportionate exposure to social and economic risk."

86 **For example:** From worrying about noise and air quality to worrying about livelihood and cultural implications.

87 For more on health effects of mining, see Schiffman, R. (November 21, 2017). "A Troubling Look at the Human Toll of Mountaintop Removal Mining." Yale Environment 360, Yale School of the Environment; Lucas da Silva-Rêgo, L., Augusto de Almedida, L. & Gasparotto, J. (July 2022). "Toxicological Effects of Mining Hazard Elements," Energy Geoscience, vol. 3, issue 3; and UN Office for Disaster Risk Reduction (February 6, 2025). "Mining Hazards."

5. Strategies and approaches

Summary

Impressions: Types of strategies and approaches being supported

Current headlines[88]

- Technical assistance, policy advice, and capacity building receiving considerable portion of funding
- Advocacy, often targeting mining companies and producer governments, receives some funding
- Knowledge sharing and production a priority for some funders
- Dominance of project-based support over core or general operating funding

Anticipated shifts

- Much more variation in types of strategies and approaches being funded
- Addressing capacity gaps likely to continue to be very high priority for most funders
- Global standards declining area of interest
- Dialogue and coordination platforms anticipated to increase in importance
- Knowledge sharing and production likely to see increasing funder interest
- Advocacy also likely to continue to be a significant funding area, though with wider range of targets
- Emerging funding areas include work to create conducive political economy contexts (e.g., through coalitions, strategic narratives, strategic litigation) and private sector-based initiatives

Reflections: Concerns and trade-offs with those choices

- The complexities of focusing on private sector pathways
- An evolution in thinking about knowledge production
- An uncertain future for global standards

Gaps: Types of strategies and approaches with perceived need for more attention

- Strategic communications capacity and narrative support
- Support for coalition- and movement-building
- UN and other global processes
- Integrating responsible mineral standards into public financing of the mining sector

Impressions

Funders seek to address the various themes discussed in the previous section through a rich catalogue of strategic approaches. **Figure 7** identifies the mineral governance modalities and activities we identified in our research.

88 Within our dataset, information on strategies and approaches was fairly inconsistent. Therefore, assertions about current trends are based largely on the knowledge of the authors and content discussed in interviews.

Figure 7: Mineral governance modalities and activities – how change is pursued

Mineral governance modalities and activities – how change is pursued

- Research
- Technical assistance/policy advice/capacity-building
  - Legal and regulatory reforms
  - Institutional capacity-building
  - Capacity-building for civil society
- Knowledge production and sharing
- Advocacy[89]
- Private sector standards and mineral governance practices
- Dialogue spaces/coordination platforms
- Global standards
- Strategic coalition-building
- Strategic narratives
- General operating support

While for many years much of mineral governance funding was focused on technical assistance, capacity-building, advocacy, and research, there is now a much wider array of pathways being considered to try to improve mineral governance outcomes. Emerging modalities for engagement seem to reflect a growing appreciation of the complexity of governance issues and the need for multi-layered strategies and approaches to address them.

Technical assistance, policy advice, and capacity-building continue to be high priorities for many funders

There seems to be a continuing emphasis on technical assistance, policy advice, and capacity-building, provided directly by funders (often the focus for government, intergovernmental, and multilateral funders) or via implementing parties (for all types of funders). Such resources are typically directed at governments to help effectively design and implement relevant policies, legislation, roadmaps, and projects. They also sometimes target civil society and community level actors to enable them to press for their rights, needs, and concerns related to mining.

There is a robust appetite for knowledge-sharing and production

As funder and producer governments take on the task of attempting to expand beyond the *raw-material-extraction-and-export* model, several interviewees anticipated the growing need for access to relevant knowledge, advice, and information for value addition activities. Various funders and implementing parties underscored the importance of bolstering government, civil

89 **Methodological note:** For the purposes of this analysis, a standard definition of advocacy is adopted and considered applicable from project to global levels: "Advocacy is an activity by an individual or group that aims to influence decisions within political, economic, and social institutions. Advocacy includes activities and publications to influence public policy, laws, and budgets by using facts, their relationships, the media, and messaging to educate government officials and the public." Wikipedia. [accessed February 3, 2026].

society, and community knowledge of key themes to enable their effective participation in mineral governance activities through modalities such as:

- **Research** ranging from assessments of the best value addition prospects for a specific country to systematic analyses of different policy options; from intelligence on specific companies to accessible and balanced environmental impact assessments.
- **Knowledge hubs, academic partnerships, think tanks, and centers of excellence** to serve as standing bodies, producing, centralizing, and sharing bespoke data, analyses, guidance, information on good practices, and other resources to support key figures working on various aspects of mineral governance.[90]
- **Peer-to-peer knowledge sharing and learning networks** to share expertise and lessons among key stakeholder groups. Suggestions for such peer networks focused on connecting mineral governance funders,[91] producer government officials,[92] mining communities[93] within and across countries and regions,[94] and mining companies.[95] The thinking is that such pathways could help bolster the knowledge and capacity of key stakeholders around specific aspects of mineral governance moving forward.

Dialogue and coordination platforms appear to be emerging areas of enthusiasm

Platforms provide an opportunity for sustained engagement as standing mechanisms to enable a group of actors to come together to address a particular theme. A number of funders and implementing party interviewees indicated eagerness to explore **dialogue platforms** to help stakeholders to build relationships, share perspectives on key decisions, and identify areas of shared interest. **Coordination platforms** were also raised as a way of supporting more efficient and effective approaches to implementation and deliberate divisions of labor when the reform area in question involves multiple parties.

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90 **For example:** A specific idea for a knowledge hub that was raised by an interviewee is the creation of an analog to the International Energy Agency but for mining, i.e., an International Mining Agency.

91 This was suggested both to share experiences and priorities, but also to build on the latter to coordinate efforts and work more strategically.

92 **For example:** Connecting counterparts working in similar roles across different countries (the Rockefeller Foundation is supporting a South-South dialogue platform with the Natural Resource Governance Institute (NRGI) and other partners to do just that, called the South–South Transition Minerals Learning Platform, (launched in December 2025) and connecting officials specifically from more established producer countries with newer producers so the latter can learn from the former early on in the mining journeys.

93 **For example:** The suggestion here was to connect communities within and across countries to learn from each other about negotiations, safeguards, network development, negotiation of benefit-sharing agreements, etc. An additional idea we would offer based on our research is connecting civil society or mining communities within and across countries to share experiences related to various experiences interacting with the mining sector, for example, through a platform for connecting organizations working on regional initiatives to protect the Amazon with counterparts working on regional ecosystem themes in Africa.

94 **For example:** A survey respondent from an implementing party described their work enabling regional peer-learning workshops and legal empowerment sessions on just energy transition and transition mineral accountability.

95 **For example:** One idea here was to connect major mining companies with junior companies, to allow the former to help improve the standards of the latter based on their more extensive resources, systems, and experiences. Another idea was to create informal spaces for major companies to share with one another lessons and good mineral governance practices of which they have experience.

Spotlight: Ideas for platforms for sustained engagement

Interviewees and survey respondents raised the following ideas for dialogue and coordination platforms:

- **Project-specific dialogue platforms** – Project-level dialogue platforms for enabling ongoing engagement across communities, companies, and governments to address developments and problems as they arise over the full lifetimes of specific mining projects.
- **National policy dialogue platforms** – Dialogue spaces for relevant mineral governance stakeholders at the national level. EITI multistakeholder groups were mentioned as valuable examples of such platforms in some countries. An example given of another type of potential platform would connect national civil society, academia, and progressive policymakers working on mineral governance issues.
- **Funder coordination platforms** – Funder platforms at the global and national levels to strategically coordinate activities, avoid duplication, exploit complementarities, and streamline processes for recipients working on mineral governance. See further discussion on this in Section V on *Exploring opportunities for coordination and collaboration*.
- **Regional coordination platforms** – It was also noted that platforms could be useful in fostering and advancing subregional and regional coordination around mineral governance. They could bring together key government, civil society, and/or private sector actors from relevant countries.
- **Global coordination platforms** – Spaces to connect key actors working on mineral governance beyond borders. Existing examples include the Paris Peace Forum's Global Council for Responsible Transition Minerals (multistakeholder), Intergovernmental Forum on Mining (governments), and European Partnership for Responsible Minerals (multistakeholder). Additional suggestions raised by interviewees and survey respondents include: a platform connecting producer governments with the global finance community to help coordinate and mobilize financing for specific countries or projects; or a platform to bring the perspectives of these governments to broader global trade discussions (e.g., through dedicated subgroups of existing global trade institutions focused on mining issues). An implementing party suggested the value of a platform for "expanding strategic partnerships across climate, business, human rights, and extractive sector advocacy networks to bridge knowledge siloes and build a cross-border coalition for transition mineral justice."
- **Producer government coordination platforms** – One funder suggested an OPEC-like platform to allow producer governments (perhaps within a specific region or exporting particular minerals) to work together, collectively bargain, share experiences with specific companies, and learn from each other more broadly. As noted above, a related suggestion was a New Producers Group for mining analogous to the one Chatham House long hosted for new petroleum producers (now New Producers for Sustainable Energy).[96]

96 One interviewee advised that to prevent platforms from becoming "talk shops" and to maximize their contributions to mineral governance, funders should consider encouraging and supporting follow-up mechanisms and activities.

Support for advocacy continues to be important to funders and implementing parties alike, but with a wider view of targets

Advocacy has long been an important element of work funded on the broader category of extractives governance and subsequently mineral governance. That has not changed. What seems to be shifting a bit is ideas about the appropriate targets of advocacy expanding beyond governments and mining companies to include those companies buying and using minerals in their outputs (we will call them **purchasers**)[97] as well as **consumers** of the end products. This plays out in various ways including advocacy targeting tech and electric vehicle companies to commit to, and create demand for, responsible mineral commitments such as Initiative for Responsible Mining Assurance (IRMA). Investors and investor groups (including pension funds) have also been advocacy targets, e.g., those who created the Global Investor Commission on Mining 2030 (chaired by the Church of England Pensions Board).

Activities targeting private sector actors and practices are attracting considerable attention

A common theme raised across many interviews was that, with the surge in demand for minerals (in some cases coupled with pessimism about government-based reform prospects), the actions of mining companies – as well as investors in their projects and companies buying their outputs – are increasingly viewed as crucially important to shaping mineral governance outcomes. Therefore, efforts to try to steer company behaviors to improve mineral governance outcomes seem to be gaining interest. Some funders and implementing parties focus on improving **corporate social responsibility** (**CSR**) practices, monitoring, and enforcement, although others argue the potential gains from this pathway are too limited in light of existing incentives driving profits above all else.

A range of **standards for responsible mining** have been proliferating.[98] According to our dataset, IRMA is the most popular of these standards, receiving funding from several private and industry foundations as well as one government funder. Some funders are seeking opportunities to directly engage with companies and commercial banks that are financing mining projects.

Sympathies are mixed when it comes to the future of global standards and processes

Global standards and processes were long a major focal point for work on extractives governance, popular with a wide range of funders. However, in the current mineral governance funding and geopolitical landscapes, there seems to be more divergence across funders. Some are continuing to invest in the development of overarching standards and guidance, including EITI, the Responsible Minerals Initiative, and processes like the work of the UN Panel on Critical Energy Transition Minerals. Others, however, are moving away from this type of work, at times explicitly favoring interventions at local, regional, and national levels in hopes of better prospects of impact.

97 **For example:** An implementing party interviewee shared an example of advocacy targeting major companies like Tesla and Google to persuade them to commit to buying minerals from mines subject to assessment against one of the more rigorous industry standards.

98 **For example:** The Responsible Steel Initiative; The Copper Mark; The Copper Mark (January 24, 2024). "An introduction to the Risk Readiness Assessment 3.0;" Aluminium Stewardship Initiative; Global Battery Alliance; and the Accountability Council.

Some funders are supporting emerging strategies around politically savvy approaches

A small subset of funders are supporting strategies implicitly aimed at **creating political economy contexts** more conducive to progress on mineral governance (although not always explicitly described as such). With support for work on **strategic coalitions**, a few of these funders are seeking to actively bolster the power of pro-reform actors through collective action and the sharing of knowledge, capacities, political clout, networks, and other resources. Multiple implementing parties mentioned this coalition work – connecting key actors within and across stakeholder groups – as increasingly important to their efforts to more actively address the power dynamics and political contexts shaping mineral governance outcomes.

Two interviewees mentioned funding efforts to develop and disseminate **strategic narratives.** This work is intended to broaden support and mobilization around mineral governance issues by framing them in ways that amplify sympathy for specific responsible practices. Alongside these, at least one funder in our dataset of currently-active projects is supporting the use of **strategic litigation** to advance good mineral governance, a vehicle for trying to shift the balance of (dis)incentives or costs for those who might undermine good practice.[99]

Funding for general operating expenses has been giving way to more project-based funding

For several years now, much of the funding targeting civil society actors has been project specific rather than targeted at core funding for general operating expenses. One funder noted that this pattern is occurring across the funding landscape and is not specific to mineral governance. Multiple implementing parties view this shift as hamstringing their ability to pursue their priorities in autonomous ways, free from the influence of the priorities and agendas of mineral governance funders. One funder specifically noted that unlike core funding, "short project cycles weaken continuity and political leverage." Others mentioned the importance of core funding for scaling work, supporting permanent staff recruitment and development, and supporting travel to global convenings.[100]

Reflections

An evolution in thinking about knowledge production

With more funders "localizing" their work in various ways,[101] the idea of tailoring knowledge resources to the specific goals and contexts within which mineral governance work is being pursued – rather than global analyses applied in a top-down way – appears to be gaining traction. One funder spoke of the importance of supporting think tanks devoted to work on

99 For a discussion of the use of strategic litigation by social movements in the mining sector, see Spalding, R. J. (March 2023). "The politics of implementation: Social movements and mining policy implementation in Guatemala." The Extractive Industries and Society, vol. 13.

100 For broader discussions of the value of core funding beyond mineral governance issues, see, e.g., Guizzardi, S. (October 30, 2024). "What evidence is there on the impact of core funding?" Oak Foundation; or Buteau, E., Marotta, S., Martin, H., Orensten, N. & Gehling, K. (2020). "New Attitudes, Old Practices: The Provision of Multiyear General Operating Support." The Center for Effective Philanthropy.

101 Discussed further above in III. 1 and in section IV.

mineral governance issues in Africa, with African experts who are "closer" to the issues on the ground leading on identifying topics and knowledge production. Others emphasized the importance of supporting and drawing on local academic institutions and experts more broadly. The value of indigenous and community knowledge – for example, for assessing environmental impacts of mining or for designing nature-based solutions to address the environmental impacts of mining – is another theme that has been coming up in mineral governance meetings and panels over the last few years, although it does not appear to be translating into major shifts in funding flows, yet. A few interviewees pointed out that regional and global knowledge production can complement more localized analyses by aggregating lessons across contexts.

The complexities of focusing on private sector pathways

Some see industry-based "solutions" to mineral governance challenges as inevitable if meaningful change is to be pursued because, as one interviewee from a multilateral funder put it, "nothing happens without industry." These approaches often focus on responsible mineral guidance and standards, developed and deployed to try to get companies to change their behaviors in alignment with such commitments. However, the proliferation of standards for industry does not necessarily mean that mining companies are now adopting and implementing a comprehensive suite of responsible environmental, social, and labor practices, nor that all stakeholders see such standards as a desirable way for funders to advance mineral governance.

There is significant **variation and fragmentation across standards**, with different criteria and assessment processes associated with each. Therefore, it is difficult to track what individual companies are committing to and how commitments are being implemented. Moreover, their **voluntary nature** means that industry actors have the discretion to choose the standards they opt into and, to a large extent, how they implement those commitments. As a result of such factors, and the absence of strong monitoring systems, it can be difficult to decipher **who is actually doing what and whether/how these standards are impacting mineral governance outcomes**. As debates emerge around the appropriate division of labor across private sector, government, and other stakeholders, opponents argue voluntary private sector commitments are an insufficient substitute for government policies, legislation, and enforcement (and therefore, not a good use of mineral governance resources). This is not least, they argue, because the interests of companies are simply not the same as or aligned with broader welfare goals. Even well-intended corporate activities may contribute to unintended negative consequences.[102]

In terms of the **coverage and nature of formal mineral governance standards**, *civil society actors* often anticipate a race to the bottom when the private sector leads on designing them, especially when attempting to coordinate at the industry level, as in the case of the Consolidated Mineral Standards Initiative. Critics fear that it is in corporate interests to pursue the weakest possible responsible mineral governance commitments and that, while individual companies might have

102 For example: For a sampling of expert views on these issues from the broader development community, see Development Aid, Experts Opinion (December 22, 2025). "The pros and cons of involving the private sector in international development." As one person quoted in the piece opined, "Commercial incentives don't always align neatly with social goals and, in the absence of strong regulation, private initiatives can unintentionally reinforce gender inequalities, strain local markets, or overlook the specific risks facing marginalized groups. Add to this the global North–South power dynamics that still shape many development partnerships, and it becomes easy for external priorities to overshadow local needs or weaken local institutions, contravening Do No Harm principles."

stronger track records, industry standards will coalesce around the lowest common denominator.[103] Some contend that governments and stakeholders directly impacted by mining should be setting and enforcing standards (but acknowledge the difficulty of this when governments are eager to attract investments). A handful of funders interviewed for this analysis were skeptical of industry standards and one stated outright that the private sector should not be driving governance reforms.

On the other hand, *industry insiders* argue that if they set the standards, the prospects of widespread uptake and implementation by companies will improve, whereas higher standards developed by external actors are likely to be skirted. According to this view, companies simply do not have an interest in making deeper commitments than the minimums they think are required to obtain and maintain social license. Any attempts by other actors to require more than that may prove counter-productive if industry actors decide to reject them and do nothing. Ultimately, the extent to which powerful private sector actors will voluntarily serve broader social, economic, environmental, political, and climate welfare goals will boil down to a question of incentive alignments, that is, the extent to which different private sector actors have an interest in making and implementing various mineral governance commitments.

Spotlight: How to incentivize companies to act in the interest of broader mineral governance priorities?

Supporters of more rigorous standards argue that there are various ways to **create company interests in adhering to them**. The following ideas were presented in our research:

- Trying to incentivize higher standards and more rigorous supply chain due diligence through **advocacy with purchasing companies and communities**, arguing that responsible supply chains are more resilient and ethical. They also provide tools and resources for assessing supply chain performance, including certification and scoring schemes.[104]
- **Direct advocacy with reputation-sensitive companies**, attempting to persuade them with the "business case" that higher standards would translate into less conflict and greater benefits for their bottom lines over time.
- **Advocacy targeting commercial and multilateral financial institutions** in hopes of getting them to integrate more extensive mineral governance requirements into their lending and financing criteria.[105]
- Creating value – e.g., reputational or financial – for companies and countries by verifying and bringing **positive attention to those upholding high standards** as hubs or exemplars of responsible practice.

Pushing companies to act in the interest of broader mineral governance priorities requires a compelling reason to do so. For funders, the upshot seems to be that if they are going to support initiatives targeting private sector actors, they should seriously consider allocating resources for implementing parties to pursue complementary activities necessary to incentivize meaningful uptake and implementation in ways that are proportionate to the requirements being pursued.

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103 For a discussion of some of these concerns, see Menad, A. & Greenspan, E. (December 19, 2024). "Corporate-Led Mining Standard Falls Short." Oxfam America.

104 One of these interviewees made the point that civil society can potentially play a powerful role as an arbiter across mineral governance standards, determining which are worthy of being associated with good practice and which are not.

105 **For example:** Advocating for integration of responsible mineral governance provisions in the renegotiation of the International Finance Corporation (IFC) Performance Standards.

Lastly, one funder raised the issue of **which mining companies are and are not being engaged** in improving their mineral governance standards. They noted that most standards target improvements to the practices of major mining companies, but it is often junior companies who are doing much of the exploration and development work and so are directly involved in some of the early decisions and actions shaping mining impacts and trajectories. In response, this funder is planning to support work focusing on encouraging more responsible practice among junior mining companies moving forward and suggested other funders consider doing so as well.

An uncertain future for global standards and processes

Interviewees who were more skeptical of the value of global standards and processes tended to hold the view that, with limited resources available, such standards might not be the most strategic bet. According to this view, existing standards had failed to translate into meaningful improvements in mineral governance on the ground despite significant investments and should not divert future funding from more pressing, and potentially more impactful, context-specific work on mineral governance. On the latter, multiple interviewees pointed out that mineral governance problems, and the prospects of different pathways for addressing them, vary extensively from one context to the next, making global standards less useful than funding for context-specific interventions.

However, many see continued work on global standards and processes as critical to advancing mineral governance practices worldwide. Proponents, including funders who continue to provide support here, argue that in light of significant global attention to mining issues at the moment, there is an opportunity to use global standards to shape the behavior of companies and governments that should not be squandered. For instance, one implementing party interviewee thought that the renegotiation of the International Finance Corporation (IFC) Performance Standards could be a particularly auspicious opportunity to push for mineral governance changes that could impact the practices of investors, mining companies and, therefore, project-related outcomes across the globe. Others describe global standards and processes as crucial ways of centralizing disparate mineral governance issues and debates and potentially harmonizing action. They provide opportunities to generate global consensus on some basic starting principles for other actors to apply in more localized ways. Such baselines can be used to help country-level actors advocate for raising national standards and, in such ways, potentially have far-reaching impacts. For such reasons, supporters argue that, despite some of the limitations described above, global standards and processes continue to merit support.

Gaps

Strategic communications capacity and narrative support – Various people noted the potential value of more support for work on strategic narratives as a way of shaping norms around and building support for good mineral governance practices. An implementing party survey respondent suggested that there is an urgent need for more tools and resources to effectively message around responsible mineral practices and challenge "green extractivism" (that is, extractivism driven by the demands of the global energy transitions).[106]

106 The same person noted that "working e.g. to host public awareness events and targeted side events in main fora (EU, UN, OECD) costs more money, as they are hosted in expensive capitals and logistics need to be arranged and rooms often cost thousands for an evening."

Support for coalition- and movement-building – Another respondent suggested the need for much more funding for far-reaching and durable collective action meant to improve the power and influence of reform proponents. Moving beyond technical support, this kind of funding would focus on enabling and sustaining movements and strategic coalitions to demand and bring about change.

UN and other global processes – Some implementing parties and a handful of funders mentioned that more attention should be paid to global standard setting and processes.[107]

Integrating responsible mineral standards into public financing of the mining sector – One implementing party noted that advocacy targeting this integration is an under-explored pathway for trying to induce good investor, company, and producer government practices.

Conversation-starter questions on the types of strategies you pursue and support

What are some feasible ways to amplify the reach, impact, and sustainability of technical support?

What types of dialogue or coordination platforms are likely to have the best chance at improving mineral governance outcomes? How can funders support such platforms to increase the likelihood that they serve as more than talk shops and will actually contribute to positive practical outcomes?

Should funders be providing more general operating support than project-based support? Why? Which funders are willing and able to do this? For those who are less amenable, why? Is there anything that can be done to overcome this?

What are the most and least strategic uses of global standards and processes? Where are the opportunities to realize the greatest value in terms of improving mineral governance outcomes? Which types of standards and processes are less promising investments in a tight funding climate?

107 **For example:** For coordinating key actors, positions, and guidance (see caveats above).

IV

Cross-cutting observations: Key factors shaping funding flows

In this section, we highlight some factors that cut across and shape the various dimensions of funding discussed in Section III.

Summary: Key factors shaping mineral governance funding flows

- Internal funder attributes and priorities
- Issue framing
- Localization shifts
- Context specific attributes and needs
- Hot topics and broader funding trends
- Prospects for impact?

Internal funder attributes and priorities

How funders direct their resources can partly be a reflection of their internal dynamics and priorities. Consider how **mission focus** can impact decisions on thematic targets or strategy preferences. Broadly speaking, for those funders whose internal priorities support mining activities expansion (seeking, for example, increased volumes of CETM for energy transitions, investment promotion opportunities, mineral security, or improving development opportunities for producer countries), there may be some *de facto* preferences for large-scale industrial mining over ASM work[108] or major producers over smaller ones. Whereas, those who place organizational emphasis on poverty alleviation or child labor might favor work on ASM over industrial mining.[109]

Spotlight: Specific considerations for funders focused on global climate priorities

As some of the newer potential funders to the mineral governance space, many climate-focused philanthropies are working out where they fit in, i.e., where mineral governance concerns align with their missions. One interviewee noted that supporting mineral governance issues at all can be challenging for climate-focused philanthropies as it requires justifying diverting resources from other, more direct, pathways to advance fossil fuel phaseout (their chief priority).[110] Another opined that these philanthropies may come from an epistemic community focused on technical and financing issues, resulting in a lack of clarity on the ways in which governance factors shape such issues as well as the ultimate goals they are pursuing.[111] However, for climate-

108 **For example:** One implementing party survey respondent argued the potential value of supporting responsible mineral sourcing from ASM where sizable volumes of a key mineral could be secured in order to alleviate some demand pressure.

109 **For example:** The World Bank's Extractive Global Support program's ASM activities, "A New Vision for ASM." [accessed February 3, 2026]; or the European Partnership for Responsible Minerals.

110 These might include supporting efforts to phase out various emissions-intensive activities, redirect financing from fossil fuel production to renewable energy projects, reduce or eliminate fossil fuel subsidies (both production and consumption), etc.

111 Including and beyond whether and how financial flows or the adoption and performance of new technologies unfold.

focused philanthropies that are entering this space, there seem to be three main priorities that commonly emerge or are suggested:

1. Integration of "responsible mining" practices in the pursuit of an adequate supply of minerals for the energy transition
2. Reduction of demand for new mining
3. Decarbonization of existing (and future) mines

Supporting "responsible mining" supplies

As noted above, more mining, and specifically of CETM, is often seen as vital for enabling global energy transitions. However, there are concerns about what this means for how such mining takes place. Therefore **pathways for fostering "responsible mining"** are becoming more popular with funders whose missions or programs are focused on global climate priorities. An implementing party interviewee worried about the possible outcome of climate-focused philanthropies that may seek to reconcile "more mining" with "responsible mining." Namely, this person argued that focusing on the idea of responsible mining – i.e. mining that does minimal environmental and social harm and that maximizes benefits for producer countries and communities – is infeasible in practice in most cases. Therefore, focusing on this target diverts attention from the realities of difficult tradeoffs that should be deliberately confronted.[112] One possible counter-argument here is that, while *truly responsible* mining might not be practically achievable, climate-focused donors' experience with fossil fuels coupled with their pushing for *more responsible* mining could in fact help improve some industry practices and support innovation and progress that might not otherwise take place.

Reducing demand for new mining

Circular mining practices are of growing interest and importance in the mineral governance space. Supporting efforts to expand cost-effective **recovery/recycling/circularity of CETM** through various channels such as processing mine tailings, setting up e-waste and battery recycling programs, and working with the manufacturing sector on scrap metal recycling may most directly align with the priorities of climate-focused philanthropies.[113] As a recent International Energy Agency (IEA) analysis shows, there is significant potential for such endeavors to relieve some of the demand for mine expansion and new mining, and, in turn, to lessen risks of potential environmental and social risks these might bring.[114] Other funding pathways, raised by implementing parties in our research, include supporting **degrowth and sufficiency-based approaches** to reducing consumption.[115]

112 The tradeoff most often raised in our interviews and surveys conversations was between support for more mining in service of climate goals and the rights of communities to decide the fate of mining on their land.

113 **For example:** Two interviewees underscored the importance of more mineral recovery efforts focused on mine tailings and waste, where there is the added "opportunity to turn environmental liabilities into valuable resources." For more on the potential for recycling to both stabilize CETM flows and also reduce environmental and social impacts of mining, see International Energy Agency (IEA) (2024). "Recycling of Critical Minerals: Executive Summary."

114 Ibid. The report goes on to explain, "Mining generates around 100 billion tonnes of waste every year, in addition to the sizeable amount already existing in active, inactive and closed tailings. This waste volume is set to increase by almost 90% over 2020 levels by 2030. Reprocessing mine waste, or tailings, can reduce waste generation and mitigate environmental impacts such as water contamination, safety risks and soil pollution. For closed or abandoned sites, it also presents an opportunity for environmental remediation. Previously, the minerals left in mine waste were considered economically unviable, but declining ore quality and future supply concerns are making reprocessing more appealing."

115 One survey respondent articulated the need to "shift from [a] 'responsible mining' framing toward 'responsible consumption and sufficiency.'"

Decarbonization of existing (and future) mines

Reflecting on where climate-focused funders might find their mineral governance niche, several people pointed to funding existing and potential **mitigation efforts specifically related to mining**. This could translate into a focus on supporting governments, private sector, and civil society to drive the decarbonization of mineral value chains by improving efficiencies and expanding the use of renewable energy to power energy-intensive mining, processing, smelting, and refining activities.[116] To build on such efforts, another suggestion was that these funders could help governments promote and communities demand the sharing of access to these renewable energy sources with energy-poor local communities.

Beyond organizational mission and goals, various other internal attributes and dynamics can shape mineral governance funding flows, including:

- **Existing geographic commitments** that lead to support flowing to places where a particular funder already has country teams/offices or has designated priority countries or regions.[117]
- **Historic partnerships** between certain types of funders and certain types of implementing parties can similarly contribute to allocation decisions.[118]
- **Institutional incentives and bureaucratic procedures** of individual funders can tip the balance towards certain activities, actors, or themes by creating (dis)incentives for different choices, that is, by making some options easier or more difficult than others to support (the relative ease of "getting money out the door" can be a major consideration for major funders).[119]
- **Individual funder competencies and commitments** – such as technical capacity, research capacity, preferred funding modalities – can lead funders to favor some options over others.[120]
- **Preference for depth or breadth** can matter as well. Those favoring depth of engagement might focus larger bets on a small number of countries, stakeholders, thematic issues, or strategies and approaches in hopes of leveraging their finite resources to maximum effect (and reducing their administrative burdens). They can do this as individual funders or through collective action focusing on areas with growing funder momentum.[121] In contrast, some funders prioritize breadth and adopt a wider approach within their own portfolios

116 Some, including a regional development bank, have already committed to this. For more on renewable energy to power mines, see "The Renewable Power of the Mine." Columbia Center on Sustainable Investment, Columbia Climate School. [accessed February 1, 2026]; and "7 Ways Renewable Energy is Transforming the Mining Industry." Mining & Minerals Today. [accessed February 1, 2026].

117 **For example:** One representative of an implementing party organization noted, due to an overall decrease of budgets, many funders' country or regional presences have contracted, potentially narrowing their geographic coverage and undermining their ability to prospect funding targets effectively.

118 **For example:** Government and multilateral funders may favor producer governments and to a lesser extent civil society and the private sector, while many of the foundations working on mineral governance themes have historically directed much of their funding to INGOs, civil society, or global initiatives.

119 **For example:** A funder shared that within their institution there are lower thresholds for justifying activities that have historically been funded or are seen as administratively more straightforward over more innovative new approaches even if these may have the potential to be more impactful. Another noted that they were consolidating towards fewer, larger grants to high-priority targets in order to reduce administrative costs and burdens on staff.

120 **For example:** Those with expertise in public financial management will provide technical assistance on aspects of mineral governance specifically related to that substantive topic. Those focused on concessional lending are more likely to work with governments rather than, for instance, community groups.

121 However, as one implementing party interviewee noted with regard to the geography of funding, focusing on specific regions or countries runs the risk of excluding a wider group of countries from the potential benefits of improved mineral governance. This might also be applicable to target actors, as noted above, narrowing in on CETM and neglecting other types of minerals and mining.

or actively seek to fill gaps being left by others in hopes of expanding coverage across the mineral governance funding landscape.

- **Risk tolerance**, that is, the ability, or willingness, to fund more experimental or risky projects that might "fail" to perform as intended, can help determine where and to whom funding will flow as well as the types of strategies and approaches that will be favored.[122]
- **Political pressures** can also impact the decisions and actions of some funders, in particular, governments and multilaterals. As touched on above, funder government agencies face significant pressure from political leaders and from their domestic publics, which can affect their activities in various ways.[123]

Across these considerations, it is worth keeping in mind that identification of such high-level preferences can be based on false dichotomies – that a funder portfolio cannot mix, e.g., more and less risky investments or complement work grounded in historic partnerships with work engaging new allies. Therefore, funders may well benefit from actively seeking out potential synergies across different areas of work.

Framing of issues

The way issues are framed and discussed seems to affect funding decisions and, in response, some implementing party practices.[124]

Oppositional vs. synergistic framings

Some framings pit different aspects of mineral governance in opposition to each other: open governance vs. national economic development; fast mining in service of climate goals vs. responsible mining in service of community and environmental rights; local target actors vs. global ones; civil society vs. government; experimental vs. traditional strategies. However, a few interviewees pointed out that these framings set up false dichotomies in funder choices and encouraged funders and implementing parties to more actively seek out framings that highlight synergies and complementarities across categories.

Negative vs. positive framings

Multiple interviewees observed that the "risk-based" framing of the traditional cases made for open governance work and efforts to minimize harm from mining tend to be less appealing to some funders and producer government officials than the language of "opportunities" and "benefits" that often accompanies work on national economic development and benefit sharing. For implementing parties and funders concerned primarily with social and environmental justice issues, the emphasis on the positive aspects of mining based on economic opportunities can obscure and divert attention from the very

122 **For example:** Those with lower tolerance for risk – government funders were mentioned in this category – are less likely to support new strategies and approaches in search of innovation, to work in more unpredictable institutional settings, or to take on emerging areas like deep-sea mining. Conversely, it was suggested that certain philanthropies have a higher risk tolerance and could more deliberately focus their action on these areas (albeit often with less resources to bring to the table).

123 **For example:** Squeezing aid budgets, driving emphasis on "win-win" framings, and having to demonstrate performance in alignment with election cycles.

124 As the interests and profiles of funders shift, implementing parties may find themselves having to pivot their framings in response by necessity.

real challenges that can accompany mining and marginalize the interests of those who suffer more than they gain.

Idealist vs. pragmatic framings

Several interviewees seemed to suggest that there has been a shift in the global normative backdrop for ODA. They observed that the idealism and post-Cold War funder enthusiasm for democratization, human rights, and sustainable development goals as the moral or ideological anchors of "good governance" are increasingly giving way to what one funder described as a more "pragmatic" approach to governance. The latter approach implicitly seems to give more weight to "win-win" scenarios in which a funder government explicitly anticipates benefits in return for funding and is agnostic to normative concerns. As an extension of this shift, both implementing parties and funders shared examples of having to make the "**business case**" related to work on open governance and environmental and social impacts, emphasizing the potential impacts on mine productivity and mineral supply chain stability in order to appeal to powerful funder and producer governments as well as influential industry actors.

Framing pressures on funders

Funders can find themselves having to be quite deliberate about framing what they support and why in order to protect their budgets and retain the ability to pursue certain kinds of work. This might involve framings that align with organizational priorities (discussed above) or board preferences. Multiple interviewees from funder governments felt that their ODA portfolios had been fundamentally reoriented by their governments' prioritization of mineral security and investment promotion coupled with waning enthusiasm among their domestic publics for open governance work. So, for example, interviewees from funder governments still supporting open governance work mentioned explicitly tying these efforts to supply chain concerns, linking to more national economic development themes like effective domestic revenue mobilization, or simply being less vocal about this work to "stay off the radar" of potential opponents in political leadership.

Context-specific attributes and needs

Some funders, particularly interviewees from international and regional development banks, indicated that, while having certain institutional principles or broad commitments underlying their work, decisions about the specific substantive issues or strategies and approaches they fund are determined by context-specific opportunities, constraints, and needs (be they technical, financial, cultural, or political).

Perceived **institutional capacity and stability matters**. Many funders shy away from working in mineral rich countries that are perceived as unstable or institutionally weak, such as Venezuela, Afghanistan, and Zimbabwe for fear of minimal prospects for progress.[125] Similarly, funders working with civil society might favor settings where there is already awareness and mobilization around mining issues, as well as reasonably open civic space, in hopes of building on and accelerating existing momentum in a conducive setting. In general, anticipated prospects for success tend to be

125 For some funders, DRC falls into this high-risk category because of the perceived challenges and uncertainties of the mineral governance context, which is seen as potentially drastically limiting what can be achieved. However, for many other funders the sheer volumes of minerals at stake seem to justify them working in the country.

severely curtailed when mineral governance efforts are unfolding in challenging governance settings with endemic corruption, weak or non-existent institutions, or widespread mismanagement.

Magnitude of need can also potentially play a role in directing funding flows. While it is clear why funders would favor more stable or advanced institutional settings, one interviewee noted that directing funding in these ways can mean that those countries, civil society actors, communities, or implementing parties in most desperate need[126] are unlikely to receive support because, in reality, they represent riskier bets for funders (particularly for those whose chief priority is increasing steady supplies of minerals). Nonetheless, some funders, including a handful of philanthropies, are directing some of their resources towards more vulnerable or under-capacitated actors and issues, hoping to help overcome some of these inequities.

"Localization" shifts

Another prominent theme arising in our research was a shift in focus among some funders "closer" to the locus of specific mineral governance concerns.[127] In terms of **implementing parties and thematic issues**, a few foundations are focusing on community actors and social and environmental impacts at the project level. Similarly, a number of funders in our sample discussed anticipated shifts in the locus of, and decisions about, knowledge production away from global think tanks, academic institutions, and research bodies and towards actors in producer countries and regions. In terms of **strategies and approaches**, both funders and implementing parties seem to already be moving away from "top-down" models and towards options designed in response to the particular demands, constraints, and opportunities of a given context. Similarly, an INGO interviewee noted that they were pivoting away from work on global standards to more context-specific country-level strategies, hoping that the shift would enable them to engage more directly with local political economy dynamics and increase their impact.

Such changes represent not only shifts in financial flows but also, potentially, in the power to influence decisions about mineral governance priorities and how they should be pursued. In this way, they seem to reflect broader movements to restructure Global North-Global South relations (a number of implementing parties working closely with national governments spoke in these terms) and to "decolonize" aid.

The influence of hot topics and trends within the broader funding landscape

A few interviewees observed that the desire to build on areas of momentum in the broader mineral governance funding landscape (and beyond to the wider development and governance fields) contributes to funding decisions. According to this logic, funders direct resources based in part on what their peers are doing. This is not meant to imply such decisions are made on a whim. Rather, they may represent a collective shift in direction that could be based on any number of factors, including evidence or growing consciousness of the value of certain practices,

126 **For example:** Those with the weakest institutional contexts, least government capacity to direct mineral governance toward productive outcomes, and least capacitated/most vulnerable stakeholders and organizations.

127 **For example:** When talking about country-level mineral governance reforms, this means funders directly supporting specific national governments and civil society actors rather than INGOs and global bodies.

changes in governance problems or in the global normative context within which they are embedded, or hopes of improving prospects of impact by coordinating with a critical mass of peers. Nonetheless, the implication is that funders might favor or disfavor certain courses of action for mineral governance based on movements in their broader community.[128]

Prospects for impact?

Numerous funders and implementing party actors wondered whether funding decisions are in fact driven by assessments of prospective impact, that is, on evidence-based assessments of where they are likely to do the most good. This certainly seems to be the underlying assumption of many actors who attempt to offer evidence and rationales for various impact-centric ways of working. While we cannot offer a definitive response, based on our research the answer seems to be: sometimes, but it depends on the weight of other factors and on how impact is being defined and measured.

Some funders give significant weight to prospects of improving outcomes and being impactful over time. Notably, multiple interviewees indicated backing away from funding traditional open governance work or global initiatives and processes because they believe these types of efforts would not be the most impactful use of their resources. Those adopting strategies and approaches that are politically savvy,[129] locally-led, or grounded in systems change principles tend to favor these kinds of work because they are typically framed around improving prospects for impact. One funder mentioned their grant proposals explicitly require specification of an impact goal, accompanied by qualitative and quantitative measures to assess changes in peoples' lives. However, any of the considerations discussed above in this section – from internal institutional incentives to broader funding trends – can supersede or displace anticipated performance considerations in determining funding decisions if given more weight in a particular situation.[130]

Even when "impact" is nominally prioritized, there can be significant variation in what this looks like in practice, depending on how individual funders or implementing parties define and measure their goals.[131] An upshot of all this is that when the hierarchy of goals and intended impacts varies across individual funders and across funders and implementing parties, "performance" becomes a subjective concept. When there is misalignment across the goals of different actors, their respective funding decisions and the work they support can appear to be ineffective to others.[132]

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128 **For example:** Favoring CETM, focusing on a specific handful of countries, elevating national economic development activities, etc.

129 Examples of this would be strategies deliberately sensitive to political settlements, coalition-building, interest- and incentive dynamics, etc.

130 **For example:** Mineral governance outcome might take a backseat to other concerns such as: administrative ease of "getting money out the door," the need to respond to pressure to deliver short-term wins, alignments with staff or organizational expertise, institutional inertia, or, in the case of funder governments, political goals like bolstering an ally.

131 **For example:** While implementing parties and even some funders have long implicitly assumed that "good governance" practices are those that effectively optimize broader economic, social, political, climate, or environmental welfare outcomes in producer countries, which aspect of broader welfare is emphasized over others differs across actors. Moreover, many funder governments now seem less concerned with producer country welfare outcomes than with their own national economic, political, or security goals, making their definitions of success likely very different than those of other actors working in the space.

132 **For example:** For an implementing party that equates "good mineral governance" with transparency and accountability or equitable economic gains, funding that promotes funder-country investment or access to minerals processed outside China without advancing these principles would be seen as failing regardless of whether it was the chief concern of the funder governments in question.

Conversation-starter questions on cross-cutting themes

What are/should be the main criteria used to determine funding allocations?

Should likelihood of "impact" be the highest priority for funders? If so, how should impact be defined? How should impact be measured? What are the main impediments to prioritizing impact?

Are most mineral governance funders implicitly in favor of mining? Which ones are more or less so?

What framing currently gains the most traction within your organization/with board members and other key internal decision-makers/with any stakeholders whose behavior you seek to change?

Are certain funders less likely to be moved by work framed around human rights, open governance, and economic equality than in the past? Why? Which ones?

What are the costs to implementing parties of framing their work to improve funding prospects? Are there reasons to avoid the "mineral governance" frame in funder engagement? When is framing just a matter of language versus a matter of significant practical (re)orientation?

What is the most strategic deployment of climate-focused funding for mineral governance?

V

Looking ahead: Improving the design and delivery of mineral governance funding

Being strategic about mineral governance funding involves not only thinking about the whom, where, and different aspects of what is being funded but also how this funding is designed and delivered. Therefore, this final section explores some ideas surfaced in interviews and surveys that can inform how funders support mineral governance work – and other areas of work – moving forward. We briefly touch on a sampling of these ideas here and have provided an overview of them in **Figure 8**.

Figure 8: Ideas to improve the design and delivery of mineral governance funding

Ideas to improve the design and delivery of mineral governance funding

- Deal with funding constraints head-on
- Identify and act on comparative advantages
- Support mineral governance in more politically savvy ways
- Build on lessons from decades of extractives governance work
- Consider a less siloed approach to governance
- Align time horizons and activities
- Explore opportunities for coordination and collaboration
- Enable more flexibility and adaptability
- Encourage experimentation and innovation

Deal with funding constraints head-on

An important starting point for this analysis was a general funding environment in which resources for mineral governance seem to be contracting or, at the least, are being dramatically outpaced by the expansion of mining activity.[133] From our conversations, there seem to be two different ways for funders and implementing parties to try to strategically interact with these constraints. The first approach involves trying to overcome these constraints, i.e., by **looking to expand the pool of funding available for mineral governance work**, either by expanding budgets of existing funders or bringing in new groups of funders (e.g., additional industry

133 It could be valuable for an organization to try to get reliable data on whether mineral governance funding is decreasing in absolute terms or actually growing in these terms by accounting for a greater piece of the shrinking ODA pie.

actors, funders from the Global South, or funders with overlapping agendas that have not yet been engaged on mineral governance). This approach involves careful prospecting of potential targets, thinking through who might be in a position to move these needles, and deliberate consideration of the hooks, framings, rationales, relationships, pressure points, or evidence that would be needed to drive more funding towards mineral governance issues. The second broad approach involves thinking through "**how to do more with less.**" For instance, this might involve exploring ways to amplify the impact of funding through peer sharing by recipients of capacity-building or technical support or looking at options for deploying voluntary technical advisors. An interviewee suggested the value of considering whether there are ways producer governments might improve their mineral governance practices without external support.

Identify and act on comparative advantages

Just as there are profound variations in the contexts within which mining unfolds and mineral governance reforms are pursued, there are also variations across funders who might fund in this space. Therefore, in order to maximize the positive outcomes with the finite resources available, **funders might consider where their respective comparative advantages lie and how to make the most of these**. For instance, while private foundations might generally have less resources at their disposal than public funders, they might have the ability to tolerate higher risks to support experimentation or to fund on longer timelines (because of their being less susceptible to pressures of political cycles). Regional development banks are geographically more constrained but might be in a better position to build on deep expertise and relationships to support actors at all levels, subnational through regional, and to coordinate actors and lessons across borders. Climate-focused foundations may be narrowly bound to CETM, but perhaps in a uniquely strong position to support certain types of work on this particular subset of minerals. Thus, understanding where a given funder group or even individual funder might be best placed to act where others are more constrained can allow for more strategic and impactful direction of mineral governance funding.

Support mineral governance in more politically savvy ways

The importance of the political viability of mineral governance funding and the work it supports were raised by interviewees in various ways, emphasizing the need to understand and address key power, interest, incentive, and institutional dynamics within a given context. Some of the following ideas were raised in our discussions:

Target actors with power – Some funders indicate that they are supporting work with producer governments rather than other stakeholders because they believe that, ultimately, these are among the most powerful actors when it comes to shaping mineral governance outcomes and, therefore, their buy-in and capacity are crucial to mineral governance reforms. An analogous case has been made around support for work on industry standards and engagement, emphasizing the power of mining companies and their investors in shaping mineral governance outcomes and therefore the need to focus on changing their behavior.

Target actors without power – Other funders take the opposite approach, explicitly focusing on those with the least power, such as civil society, mining-affected communities, Indigenous peoples,

and other historically marginalized groups and subgroups including women, youth, people with disabilities, and those living in extreme poverty. The hope is that providing support to bolster their capacity and influence will help these groups overcome some of the existing power asymmetries that work against their interests.[134] It also seems possible that widespread global demand for minerals may be increasing the power of producer country actors (partially inverting historic Global North-Global South dynamics) by enabling them to leverage acute demand from funder countries for more concessions on national and community level benefits and other priorities.[135]

Support implementing parties that take political context seriously – While much of the work being done on mineral governance focuses on technical knowledge and capacity, there is growing acknowledgement that meaningful governance changes also require conducive political economy conditions. Therefore, funders might consider supporting implementing parties deploying strategies and approaches to improving mineral governance that are actively mindful of political economy contexts and the power, incentives, and institutional dynamics underlying (including work on coalition building, realigning interests and incentives, and otherwise strategically engaging with existing political settlements).

Build on lessons from decades of extractives governance work

There is an opportunity, especially for those funders more recently joining the mineral governance space, to benefit from and **build on the hard-won experiences and lessons of those funders and implementing parties with long track records of work on extractives governance**. Various interviewees remarked that these actors possess valuable insights on a range of governance issues, the importance of which they fear some funders do not adequately appreciate. Their experiences can potentially fast-track understanding of common mineral governance challenges, offer a starting point for notions of good practice across the extractives decision chain, and draw attention to pitfalls and openings when attempting to implement these. Existing work on extractives governance can shed light on the political economy dynamics that affect whether and how effectively different mineral governance reforms can be undertaken, how different interests can propel or impede progress, how various thematic areas and strategies and approaches are deeply connected in practice, and how contextual factors can determine what is and is not feasible in a given setting. In short, rather than starting from scratch, proponents argue that newer funders can draw on lessons from the extractive governance field to more efficiently advance their respective aspirations for the mining sector and avoid the current mineral boom becoming another round of "resource curses."

Consider a less siloed approach to governance

Some argue that mineral governance issues cannot be practically cordoned off and pursued in isolation from other aspects of the context in which they unfold. According to this view, **mineral governance concerns should be understood as deeply embedded in complex systems of governance** involving interconnected actors, institutions (formal and informal), laws, and

134 This is pursued, as noted above, in various ways, including technical assistance and capacity-building for these actors, support for strategic coalitions to bolster their influence through collective action, and work on strategic narratives and communications to help them amplify interest alignment with their concerns.

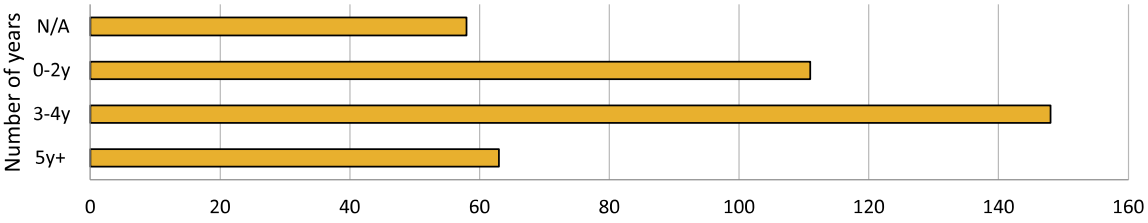
135 Having said this, one implementing party survey respondent and a few interviewees were less optimistic, the former fearing that "the energy transition risks replicating the same extractive, colonial, and exploitative systems that have historically marginalized Indigenous and resource-rich communities."

policies that may privilege or disadvantage certain actors, interests, and processes. From this perspective, root causes and wider enabling conditions should be given much more attention by funders. State capture dynamics, details of development plans, energy transition commitments, the nature of civic space, levels of party dominance, and political polarization – such broader contextual factors may not appear to be "mineral governance" concerns *per se*, but can have profound effects on how mineral governance outcomes unfold. Therefore, proponents argue that those hoping to improve outcomes from mining and related activities should consider what it would take to shift such outcomes within the broader systemic context in question (including pursuing regional or subnational options when those at the national or global levels seem highly constrained), potentially funding efforts to foster shifts of these broader systems to enable greater progress on mineral governance over time.[136] An objection to this approach is that it may be difficult to sell to most funders and publics because of the long time horizons, amorphous trajectories and challenges of establishing clear causal connections involved.

Align time horizons and expectations

There can be a misalignment between the timelines of funders and the timeframes needed to make significant progress on various aspects of mineral governance. This can result in unrealistic, and ultimately unmet, recipient promises and funder expectations. As one implementing party interviewee noted, funder commitments have traditionally favored 2-4 year cycles (this was reflected in our dataset, as shown by **Figure 9**), which this person saw as far too short for achieving meaningful progress on the types of mineral governance goals often articulated by funders and in implementing party proposals.

Figure 9: Duration of activities in dataset in years[137]



In the case of government funders, election cycles can make longer commitments more challenging and create pressure to demonstrate meaningful impacts in these relatively short windows of time. However, multiple implementing party and funder interviewees argued that the time needed to make significant progress on shifting mineral governance[138] far exceeds these funder timelines, requiring perhaps 5-10 years for outcomes to unfold.

136 For more on what a systems change approach might entail for various funders, see the work of, e.g., Rockefeller Philanthropy Advisors, Shifting Systems Initiative; Co-Impact, Systems Change Philanthropy Hub; Carey, R., Xiaoyun, L., Muttreja, P. & Severino, J-M. (May 16, 2025). "From crisis to sustainable impact at scale: Rethinking global development." The Brookings Institution; and Oxfam (September 29, 2025). "Systems Change: Insights and reflections for development practitioners." Policy & Practice, Oxfam.

137 **Methodological note:** We rounded up where activities ended on the 11th month of the relevant year, for example an activity starting on July 1, 2023 and ending June 30, 2026 was counted as 3 years.

138 **For example:** Supporting the adoption, implementation, and enforcement of relevant policies and laws, improving the capacity of key stakeholders and enabling their meaningful participation in decision-making, enhancing the transparency of supply chains, designing, and implementing systems for effective environmental protections, putting in place and empowering oversight bodies, developing shared infrastructure projects, etc.

Such disconnects can generate unreasonable expectations for funders and intended beneficiaries and also inadequate continuity of funding commitments needed to carry mineral governance reforms through to their intended outcomes. It was proposed that funders and implementing parties work together to:

1. **Identify realistic, incremental measures of progress** appropriate for shorter timeframes;
2. Consider how to **simplify time-intensive administrative procedures;** and
3. Develop **mechanisms for ensuring continuity of longer-term funding** when needed either **via individual funders extending their commitments or through coordination across multiple funders.** The latter would require funders being willing to potentially pick up existing projects from others that they did not help initiate, which may create some logistical and buy-in/ownership challenges, but these should not be insurmountable.

Explore opportunities for coordination and collaboration

A challenge that was highlighted by a number of interviewees was that individual funders are often deploying their resources in isolation from each other, which can limit potential impact, create inefficiencies, overburden implementing parties with administrative requirements and potentially competing programmatic demands, and risk progress collapsing when the funding cycle ends.[139] Multiple interviewees felt that work on mineral governance could greatly benefit from **more funder coordination and collaboration**, both internally across program areas and externally across different funders. Such efforts to more actively align and potentially amplify the impacts of funding might be organized around common areas of substantive focus, types of mining, geographic focus, or strategies and approaches.[140] Coordination could also be crucial for operationalizing practical, even if informal, attempts at aligning or gap-filling across funders as well as enabling shared resourcing. Although existing funder coordination mechanisms do not tend to focus on mineral governance issues, they might provide a starting point or inspiration on which to build.

Funders can also support **greater coordination across implementing parties** to increase their efficacy and influence. This could be done through avenues such as coordination platforms (see above *Spotlight: Ideas for platforms for sustained engagement*), enabling engagement across neighboring governments in the development of a specific value chain initiative, or mechanisms for coordinating civil society actors or social movements with shared mineral governance interests to work across siloes or jurisdictions.[141] Other examples funder support could enable might include intra-governmental coordination, multistakeholder engagements to connect across a range of relevant actors in a given context, and efforts to foster coordination or harmonization across global actors and processes.[142]

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139 See related discussion in *Spotlight: Ideas for platforms for sustained engagement*.

140 Given the information we have in our dataset and interview notes, we could easily enable a few focused conversations to explore greater coordination/collaboration.

141 In addition to fostering such coordination within countries, one implementing party survey respondent called for "funding for global movement-building, including travel support and equitable participation for Indigenous and Global South partners."

142 **For example:** One implementing partner mentioned the potential value of more coordination across UN and EU entities doing work related to mineral governance issues.

Enable more flexibility and adaptability

Historically, funding commitments have been fairly rigid. Implementing parties execute the terms and activities of a funding agreement as stipulated in an approved proposal with minimal room for deviation. However, as appreciation for the complexities and uncertainties of changing governance systems are more widely appreciated, it becomes apparent that rigid process commitments of this sort can work against efficacy – planned activities might not be yielding intended results or be the most strategic deployments of resources as conditions on the ground change, and therefore, sticking with pre-stipulated plans that are bound to unfold in unpredictable ways unnecessarily hamstrings funders and their partners.

Some funders are developing approaches to enable more flexible and adaptive ways of working. This might start with doing more groundwork to **identify partners** and then providing them with: more **open-ended funding**, more **discretion** on how they allocate resources, support for **learning systems** to track progress and changes in context, and more **flexibility** to adapt projects over time in pursuit of maximum impact.

Encourage experimentation and innovation

One interviewee, a funder, noted that many funders want to support the sorts of projects and approaches they have always funded, regardless of their performance or likelihood of success. This sort of "inertia" might play out in various ways. For instance, there is widespread agreement that many approaches to mineral governance – e.g., standard environmental and social impact assessment processes, common implementations of FPIC/community consent processes, or traditional anti-corruption approaches – fail to yield intended outcomes in many settings. More broadly, the track record of existing ideas for promoting national economic growth and sustainable development of the sort being applied to the mining sector now have also often proven problematic in practice. However, there is little evidence of support for efforts to fundamentally rethink how this work is done. Meanwhile, shifts in the broader context, including pressure from many quarters to bring new mining projects online quickly, are creating different constraints and opportunities, which will render some existing approaches obsolete.[143] In response to changing circumstances and the underperformance of some existing approaches, there may be a need for new ideas around improving mineral governance.

Some see a potential window of opportunity to leverage the current burst of attention to mineral governance issues to move away from recycling and replicating problematic existing approaches and consider, instead, ways of reworking or reinventing them in pursuit of greater impact. As funders and implementing parties seek to help bring about better mineral governance outcomes than have characterized many past scenarios, support to **innovate in areas where existing approaches and practices have proven particularly weak or where there are new challenges to be addressed** could prove valuable.[144] Some argue that such

143 **For example:** There is considerable discussion about the need for designing "fast-track" permitting processes that do not undercut social and environmental protections or expedited approval processes that do not compromise producer governments' abilities to perform proper due diligence and negotiate well-informed, good deals.

144 **For example:** An implementing party survey respondent mentioned ideas like a "standard bother fee, hazard pay, short-term insurance, or honoraria for local community leaders who are helping the NGOs."

experimentation should rely heavily on local actors and initiatives.[145] Although not all funders will be well-placed to support experimentation and innovation, as discussed above, it has been noted that philanthropies may be better placed than others to "spend the super high-risk money to do things that might not work, study the impacts" and "then with breakthrough, promising solutions in hand, to build partnerships with governments, entrepreneurs, technology partners, and other philanthropists to scale it up."[146] Without such innovation, more mining creates a real risk of more of the same historically bad outcomes from ineffective mineral governance simply proliferating further and wider.

Conversation-starter questions on improving the design of funding for impact

Are there funders not yet working on mineral governance issues who might be recruited to support these issues? Who? What would it take to engage them?

What are some ways to amplify the impact of existing funding, i.e. low-cost ways to expand the reach or beneficiaries of funding flows such as peer sharing mechanisms in which more capacitated government or civil society actors share insights or advise less capacitated counterparts?

What are the comparative advantages of individual funders and how might these be best leveraged to realize maximum benefits and minimal harm through improved mineral governance?

Would any funders be willing to take up demonstratively successful work initiated by another funder who can no longer support, or requires additional resources, to sustain it? If not, why not? If so, which funders might be most open to this? What logistical, buy-in/ownership or other challenges might this create and how could they be overcome?

Who is best positioned to undertake longer term funding?

What sorts of additional funder collaboration or coordination would be most useful around mineral governance work? What would be needed to achieve this?

145 **For example:** one implementing party underscored the value of "supporting local entrepreneurial initiatives, particularly for youth, women, and people with disabilities." Although it is worth noting a caution from another survey respondent that if focusing on local actors, it is vital to "simplify administrative procedures for funding. Complex reporting and co-financing requirements limit the participation of community organizations that are close to mining communities."

146 The first comment was made by Rajiv Shah of the Rockefeller Foundation and quoted with the second in Schultz, A. (November 14, 2025). "As Foreign Aid Dwindles, Rockefeller Foundation Aims to Fill a Void." Barron's.

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Annex I: Analysis Navigation – Heading Links

Annex I is intended to support readers in contextualising and navigating the substantive content of the analysis. Readers can click on the hyperlinked headings below to be taken to that part of the scan.

THINKING STRATEGICALLY ABOUT MINERAL GOVERNANCE FUNDING:

PERSPECTIVES ON CURRENT AND FUTURE PRIORITIES

Leila Kazemi and Anna Bulman

March 2026