

LTIRC

Leveraging Transparency to Reduce Corruption

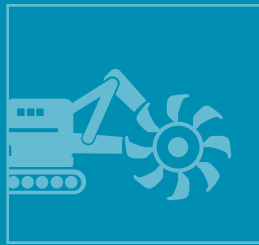
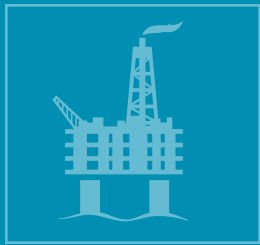


The Audacity Deficit in Natural Resource Governance: Insights from a Survey and Implications Ahead

JUNE 2022

Daniel Kaufmann and Mario Picon





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I. Context and Opportunity

COVID-19 and global challenges: then and now

The COVID-19 pandemic has been a catalyst in starkly bringing to the fore longstanding challenges. [Starting in the earlier days of the pandemic](#), and subsequently elaborated upon as part of a series on the [future of natural resource governance](#), we argued that in the wake of the once-in-a-century pandemic, the natural resource governance field faced a “perfect storm”: a quartet of challenges in the public health, economic-financial, climate change, and democratic governance arenas. And at the time, we could not have imagined the shocking Russian invasion of Ukraine triggering a major war in Europe as this paper is being released.

Think about the world right before the pandemic. The commodity super cycle that had propped up oil-rich, nondemocratic regimes had been over for almost five years, and oil prices were about to be in a free fall. Falling oil prices at the time, coupled with quarantines imposed by many governments during the COVID-19 pandemic, caused a major economic contraction during 2020 that hit resource-dependent countries particularly hard.

In parallel, due to deteriorating governance standards and increasingly isolationist policies, the United States had lost its global leadership on democratic governance, and the high costs of Brexit were becoming tangible. Several regimes in Eurasia, Africa, and Latin America were tightening their authoritarian grip and clamping down on civil society. They were emboldened by the domestic and foreign policy stance of the U.S. government at the time, which had moved away from protecting democratic values.

Meanwhile, pressure to address climate change had been mounting for some time. And attention to governance failures, including deterioration in voice and democratic accountability and entrenched corruption, was sporadic and would come to life as a priority only when a major scandal erupted, such as those emerging from the release of the Pandora or Panama papers, or the Odebrecht/Petrobras “Lava Jato” scandal originating in Brazil embroiling the top echelons of a number of Latin American countries.

Two years into the COVID-19 pandemic these challenges not only remain, but are compounded by a major new war in Europe and, related, a spike on oil prices. This reminds us that the resource curse is not merely a macro-economic management or traditional corruption challenge, but a phenomenon

that can be associated with a descent into tyranny and conflict.¹

At the same time important developments in the international landscape have been taking place, some of them presenting a window of opportunity for progress. For example, in the global political arena, the recent release of a U.S. government strategy on countering corruption and advancing democracy around the globe by a new administration, as well as some of the actions agreed at the Glasgow Climate Change Conference (COP26), offered hope. Naturally, skepticism regarding concrete progress ahead persisted, due to the delayed and partial nature of some of these climate initiatives so far, as well as the checkered record of concrete implementation of commitments made in the past. With the massive global political implications of a war spearheaded by a nondemocracy against its democratic neighbor, global initiatives are likely to be highly vulnerable or partial for some time.

The field of natural resource governance, the energy transition, and the Dialogue initiative

Addressing weak governance challenges in the management of natural resources has been a priority among an important niche of civil society for over 15 years, and subsequently by other stakeholder groups. These include international and domestic nongovernmental organizations (NGOs), as well as selected multistakeholder initiatives—such as the Extractives Industries Transparency Initiative (EITI)—and efforts in multilateral organizations such as the World Bank. A few bilateral donor agencies have also been concerned about poor governance in natural resources and supported efforts to address challenges, particularly during the commodity boom era.

The concern among some quarters—present authors included—to address sustainability and governance challenges in general (including high level corruption and state capture), and the obstacles to the energy transition, resulted in some strategic and related initiatives undertaken since 2019.²

1 As this report was readied for publication, Putin's invasion into Ukraine had started. This was taking place well after the survey of the field had taken place. Consequently, the analysis of the implications of this conflict is beyond the scope of the report. Instead, it will be addressed in separate articles. Considering these events, here we underscore the importance of unbundling the various manifestations of poor governance that are associated with the resource curse. In its earlier incarnation (v1.0), the resource curse was largely associated with economic distortions, such as the "Dutch Disease". Over time emphasis on governance (v2) took place, first on the (relatively) "softer" aspects of governance (v2.1), namely opacity and traditional corruption. To complement transparency initiatives, focus on accountability and participation was added (v2.2), to encompass the transparency, accountability and participation (TAP) troika. Further, the case for going beyond TAP, addressing issues surrounding state capture, rule of law and obstacles to the energy transition was put forth a few years ago, the so-called TAP-Plus approach (v2.3). Current events starkly point to the importance of also focusing on the "hardest" dimensions of poor governance, namely tyranny and conflict (v2.4). And it also brings to the fore an often-silent dimension of the resource curse, namely the "corporate resource curse" (v3.0), where international oil companies in many settings have supported autocrats and their national oil companies, and also engaged in state capture.

2 Examples starting in 2019 include the development of including climate change and the energy transition in a new strategy by a policy advocacy think tank/NGO in the field of natural resource governance, National Governance Resource Institute, as well as in the re-strategizing that took place in other organizations such as Publish What You Pay, and Global Witness. Likewise, debates on these challenges took place around the launch of the Leveraging Transparency to Reduce Corruption initiative's [volume](#) on addressing governance in natural resources (via the "TAP-Plus" approach) in 2019 as well. With the onset of the COVID-19 pandemic in early 2020, we [published articles](#) highlighting some priorities to address these challenges. Further, a few among oil industry producers and investors started signaling that it was time to consider a pivot in natural resources towards a more sustainable strategy.

Addressing climate change and thus the energy transition away from fossil fuels as a priority has been a rather recent and even debatable proposition across the sector.³ Further, there is no full consensus as to whether governance failures in natural resources are a major factor slowing the energy transition or not. The study and policy implications of the nexus between poor governance, natural resources, and the energy transition is still in its infancy.

Indeed, in addressing governance challenges and climate change, we were also cognizant of the limitations of views put forth by a few organizations or individuals, further complicated by a measure of skepticism from some stakeholders in the natural resource field to prioritize corruption, state capture, and/or climate change. At the same time, some stakeholders within the natural resource governance field, while well aware of the climate change challenge, were uncertain on how to fully engage with the climate action agenda. And in other quarters it was seen as a northern-driven agenda, secondary to and separate from the development imperatives.

Such diversity of views—combined with the importance of eliciting a broadly participatory and inclusive set of views spurring a vibrant debate on these thorny issues—led to the Dialogue initiative. Consequently, at the height of the first wave of the pandemic, in October 2020, a group of us, including representatives from the Natural Resource Governance Institute (NRGI), the Transparency and Accountability Initiative (TAI), and the Leveraging Transparency to Reduce Corruption (LTRC) program—a joint initiative of the Brookings Institution and Results for Development (R4D)—organized a Dialogue on the future of natural resource governance. The Dialogue included

scores of experts and activists representing multiple organizations and stakeholders around the world, with various areas of expertise, including beyond the traditional field of natural resource governance, such as on climate change.

For the Dialogue we designed and administered a special survey of its participants and utilized the results of the survey to frame issues for discussion. Drawing from the proceedings of the Dialogue, a three-part blog series highlighted key priorities for the future including state capture, civic space, role of investors, complementarity between local and international actors, and most notably, the critical role of governance in the energy transition.

Despite the richness of the Dialogue in terms of ideas and proposed actions, it remained limited to a few dozen multisectoral experts. This is the reason why, in early 2021, we expanded the participant coverage of the online survey on the future of natural resource governance, widely disseminating it over social media and professional networks with the support of partners in the field.

The analysis of the results of this expanded survey is the focus of this document. Following this introduction, this paper provides a summary of the main characteristics of the survey and basic statistics. The presentation and basic analysis of the results follow, organized around salient topics and questions. We also advance some interpretations, speculations, and questions emerging from the analysis of the survey data. In the concluding section, we suggest some concrete implications, options for paths ahead, and issues for further debate and investigation.

3 The sense of urgency and priority has varied among NGOs, including their governing boards, and among governments and industry. This “within stakeholder variance” is explored further in the analysis of the survey results.

II. The Survey

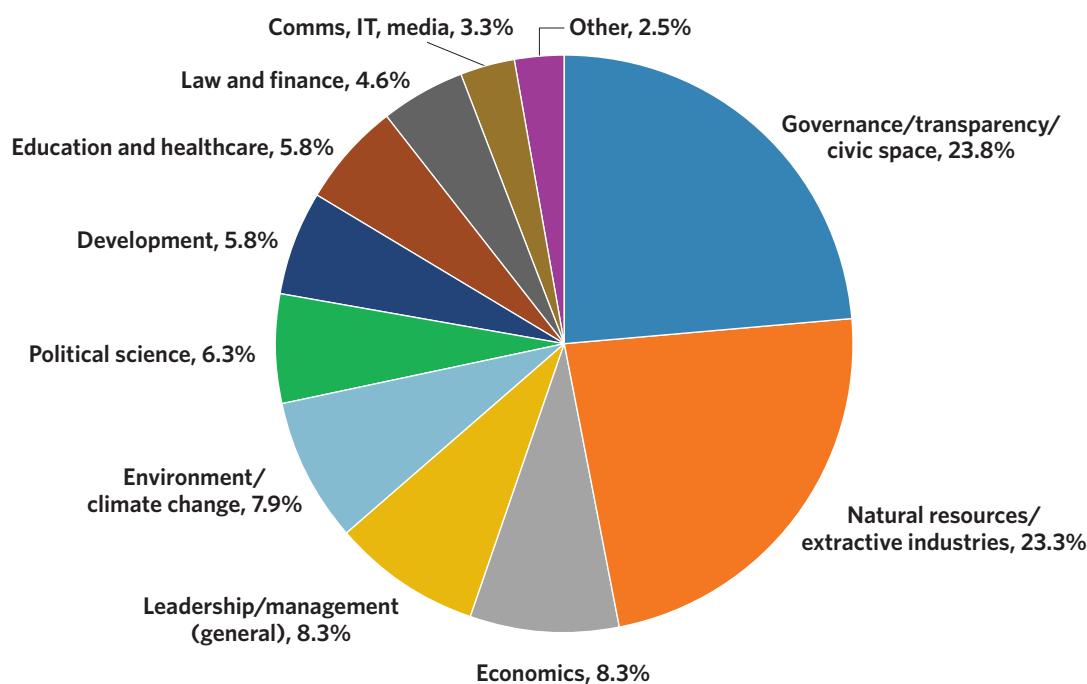
The survey covered various areas of governance, natural resources, the energy transition, and development more generally. Following the Dialogue, which featured over forty participants, we aimed to elicit a larger and more diverse set of views by expanding survey participation to cover nearly 400 participants via an online survey.⁴ The questions aimed at eliciting a broad understanding of respondent feedback on priority concerns and pending reforms in the short and medium term.

Specifically, with the survey instrument and the feedback from hundreds of respondents, we sought to have insights into the following questions:

- Even if dire, how transitory is the Pandemic and how dire is its health and socioeconomic aftermath expected to be?
- Has the priority of climate action receded due to COVID-19?
- What are the near and far future expectations in natural resource governance in the climate change era?
- What is the priority given to democratic governance in general, and to governance reforms to accelerate the energy transition in particular?
- How do respondents rate the social protection and economic challenges—including jobs?
- Do these priorities vary significantly across regions of the world or by respondents' age, gender, or professional background? Or are they largely uniform?
- In terms of future reforms, what are the most glaring gaps between the *priority* to enact key reforms and the *likelihood* of such reforms being concretely implemented?
- What concrete initiatives do respondents suggest looking towards the future?

Particular attention was given to understanding regional differences from different perspectives, as well as being able to segment the data by professional background, stakeholder type, age, and gender. The survey questions and other basic statistics are in Annex A and B.

⁴ The survey was implemented online (via the Survey Monkey platform), and nearly 400 responses were obtained in total, thanks to the interest that arose due to the collaboration and broad dissemination of the survey by many organizations and individuals via the web and social media. The survey consisted of 14 questions (some with different subcomponents), of which 11 were multiple choice, one was a rating (of various reforms) in an intensity scale, and two were open ended questions. Given the impact of COVID-19 at the time of survey implementation, respondents were asked to respond to the same key questions in the short term and in the medium term. Anonymity was assured in the survey instrument, yet nonetheless over 100 respondents opted to write in their names.

FIGURE 1: Main Professional Background of Respondents

Results from the online Future of Natural Resource Governance Survey carried out in late 2020 and 2021. N=240. Authors' calculations.

Figure 1 suggests the diversity of professional background of the respondents. Further, there is also substantial regional diversity in the responses (see Figure A1 in the annex). Close to one-half of respondents were from U.S./Canada, with the rest—the majority—distributed among respondents

from Europe, Latin America, Sub-Saharan Africa (SSAfrica), Middle East/North Africa (MENA), and Asia/Pacific. Likewise, all key stakeholders—citizens, civil society/NGOs (domestic and international), governments, multilateral organizations, and industry—were also represented in the survey.⁵

⁵ Despite the considerable size and diversity of respondents for a survey of this type, the sample ought not be regarded as fully representative of citizens around the globe. By the nature of its mode of implementation, the sample is skewed toward those “well-connected” (internet and beyond) members of largely elite networks around the globe who are engaged in these issues, and who opted to respond to the survey. For instance, respondents from MENA, Asia/Pacific, and industry, while present, are under-represented. Hence interpretative caution is in order, and particularly so in making definitive global inferences. Nonetheless, by considering that all regions, professions, and stakeholders were represented (even if not proportional to the larger universe), and by carrying out relevant segmentations and checks with the data, relevant findings and insights do emerge from the evidence. These results can guide further discussion on pending challenges for the field and point to concrete paths forward. Further, the results accurately reflect the views of the hundreds of participants in this survey, important in their own right.

III. Salient Results and Emerging Interpretations

The results of the survey provide insights on multiple challenges related to the “perfect storm” facing resource dependent countries in the present, as well as looking toward the future. It also informs on broader issues related to the socioeconomic aftermath of the pandemic and on the twin longer-term challenges of climate change and democratic governance—including the rise of nondemocratic leaders, capture, opacity, and the undermining of rule of law. The data analysis further covers the role of donor organizations and the priority and likelihood of pending reforms. The segmentation of the sample by location, gender, and age of the respondent provides additional insights and is presented as well.

Is the Pandemic Challenge Disappearing Anytime Soon?

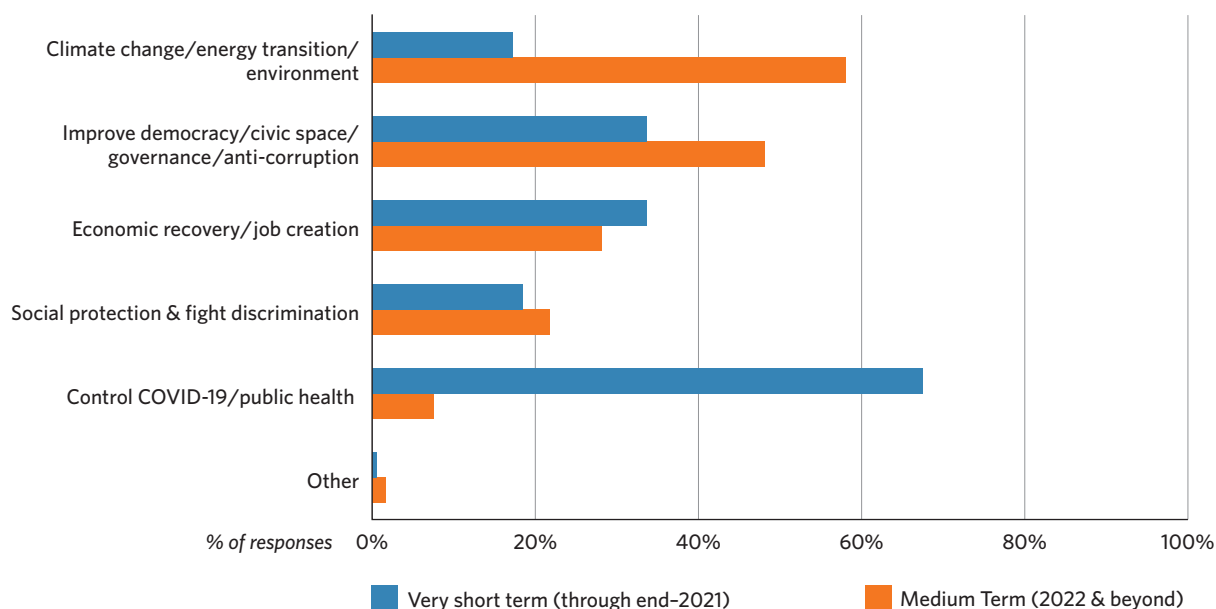
Not surprisingly, the public health challenge of controlling COVID-19, selected as a top concern by over two-thirds (68 percent) of respondents, **is atop the list of challenges in the short term**—with rather small differences across groups or regions. Yet it is also noteworthy that economic recovery/jobs as well as governance (including democratic rule of law, corruption, and capture control) follow closely behind the pandemic as a short-term priority⁶ (see Figure 2). Details on the other priorities are addressed in subsequent sections below. Notably on the challenge of COVID-19, the respondents’ views on the importance of **the COVID-19 challenge wane considerably in the medium term**, namely from 2022 onwards, with only 8 percent of all respondents considering it a high priority ahead, which has turned out to be optimistic (see Figure 2).⁷

6 In the survey’s multiple choice questions, such as the one analyzed in this section, respondents could select up to two options, to enable participants to point to more than one key priority, which was regarded as particularly relevant during the COVID-19 era.

7 Tellingly, there were no vast differences across regions, with U.S./Canada, MENA, and Asia/Pacific being selected only by 6–8 percent of participants, Europe essentially by none, and from both Latin America and SSAfrica by 11 percent. This major perceived gap in priorities between the short and the medium-term merits further scrutiny and debate—and time elapsing. This is because there is a question as to whether such sharp priority gap between the dire challenge in the very short term versus its disappearance in the medium term was to be validated. This concern emerges due to the unequal distribution of vaccination rates around the world, and the related reality of the recurrent resurgences of the pandemic due to COVID-19 mutations.

FIGURE 2: Shifting Priorities for Countries in the Short vs. Medium Term?

Q1. In your view, what are the two most important priorities in the country or region you are working on: in the short term (through the end of 2021) and in the medium term (2022 and beyond)? Select up to two choices per period.



Results from the online Future of Natural Resource Governance Survey carried out in late 2020 and 2021. N=351. Authors' calculations. Note that the total response percentage exceeds 100 percent because the respondent could select up to two choices.

The Slowly Reappearing Climate Change Challenge?

Respondents make it clear that the mirror image to the seemingly fleeting pandemic is the imminent resurgence of climate change as a top priority (see Figure 2). Only 17 percent of respondents selected it as a top priority in the short term, yet for well over one-half (58 percent) it was one of the top two priorities in the medium term, becoming the most often selected option. There is some regional variation, yet it is a high priority everywhere, ranging from a high of 70 percent for respondents from Europe, to about 50 percent for respondents from MENA/Asia and SSAfrica.

Notwithstanding the universal acknowledgment by survey respondents that climate change ought to eventually become a priority, that response refers to the medium term only, revealing a glaring gap vis-à-vis the very low priority ascribed to climate change in the short term. Overall, respondents simply did not regard climate change as an urgent priority. It may be argued that this partly could be explained by respondents being circumscribed in terms of the number of priorities that could be selected, which was capped at a maximum of two choices, during dire pandemic times (when the latter was obviously the priority of choice).

Yet it is worth noting that choices other than the COVID-19 pandemic, namely governance, economic recovery/jobs, and social protection/discrimination,

did garner higher priority response rates than climate change in the short term. Clearly, the urgency of short-term pandemic-related challenges such as economic recovery and jobs, and possibly even governance, with direct (management/health systems) consequences of the pandemic, may have dominated the perceived longer-term “future generation” challenge of climate change.

At the same time, it is worth noting that the COVID-19 pandemic, rather than being temporary, is becoming endemic, hence managing it will be a priority, one that may or may not coexist with progress on the economic, governance, and climate change fronts. In fact, beyond the urgent short-term time frame, the “medium term” is now upon us, and in reality the COVID-19 challenge, and its priority is actually not disappearing, but instead becoming endemic and in need of longer-term management. This forces a day of reckoning; the international community must not further delay concretely addressing climate change and protecting democratic and governance standards. The all-consuming early COVID-19 pandemic days, justifying in some quarters the postponement of other priorities during much of 2020 and 2021, may not have been fully compelling even in 2020, yet it is certainly not compelling in this “new endemic” era.

Around the time of the survey in 2021, some specific pivots to address climate change were beginning to take place, both by governments (the U.S. and some in Europe, among others), as well as in industry and the markets (Exxon, Chevron, and activist hedge funds, among others). It is thus legitimate to question why there appeared to be reticence among survey respondents regarding how they prioritize climate change in the short term. Tellingly, there were no large differences across groups of survey respondents, all of which gave climate change a low

priority, whether across regions, civil society (only 21 percent said it is a short-term priority), or those working on governance and/or natural resources.⁸

The Steady Challenges of Democratic Governance, Jobs, and Social Protection

It is noteworthy that the challenge of democratic governance (which includes voice, rule of law, and addressing corruption and capture) is regarded as a high priority in the short term, and an even higher priority in the medium term. Governance is rated as a high priority across regional and thematic groups in the medium term, and to a slightly lesser degree, also a high priority in the short term. In the medium term, with 48 percent of respondents, the challenge of democratic governance is second only to climate change, with economic recovery/jobs (28 percent) and addressing social protection and discrimination (22 percent) following behind.

A persistent socioeconomic crisis in some regions? *Wide regional disparities in the socioeconomic impact of the pandemic.*

We recall our earlier result that in terms of the public health aspects of the pandemic, the expectation across all regions of respondents was that the challenge would wane from 2022 onwards. Despite this unanimity, respondents across regions provided widely disparate views on the socioeconomic after-effects of the pandemic.

Responses to the second survey question which asked respondents to indicate which regions would be subject to the largest socioeconomic shocks, suggest a sharp contrast within the public health

⁸ Further, the perception in some quarters that some civil society organizations and actors in the NRG space have been generally slow and/or rather incremental in pivoting toward making climate change a priority is consistent with these survey results. An important factor to be considered (below) is the complexity of the issues around the energy transition for fossil fuel dependent developing and emerging economies.

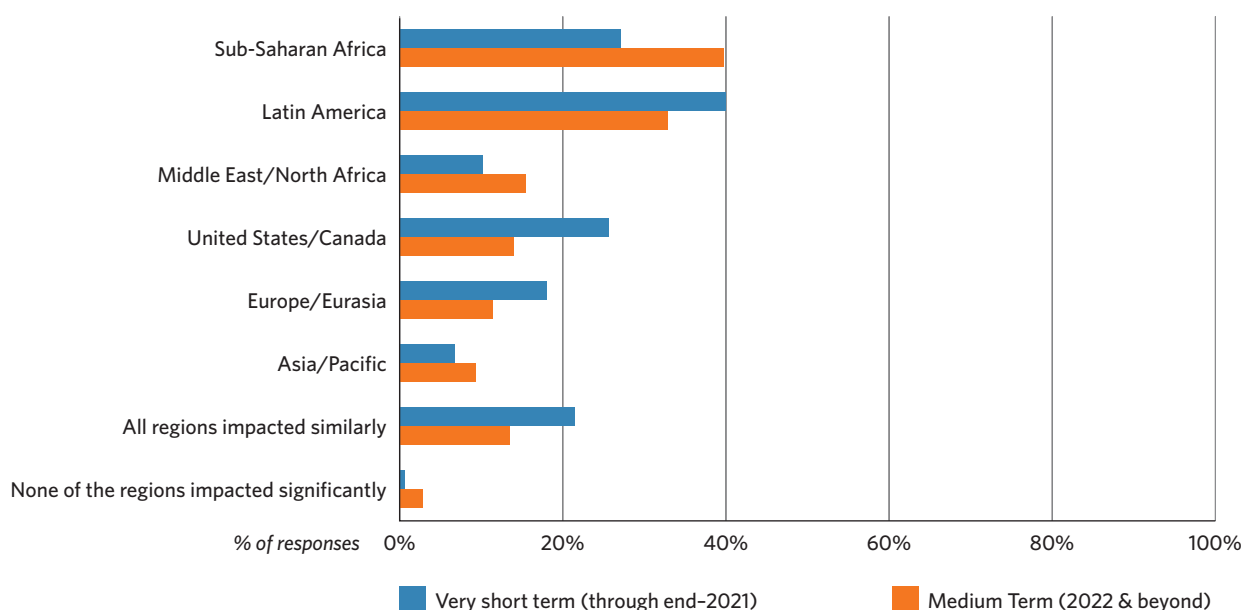
dimension and point to major regional disparities. Latin America (most-challenged region economically both in the short and medium term) and SSAfrica stand out, exhibiting by far the most acute challenges now and in the future (see Figure 3).

The challenge was not seen as dire in MENA and Asia/Pacific, yet expected to grow in the future, while in Europe and U.S./Canada the challenge was seen as significant but declining in the future (see

Figure 3). And while over 20 percent of respondents were of the view that all regions (rather than a particular one) were similarly impacted significantly in the short term, that share falls substantially in the medium term. This points further to a perceived highly divergent regional path ahead regarding the socioeconomic impact of the pandemic, where expectations for SSAfrica and Latin America were particularly dire among respondents.

FIGURE 3: Regional Variation Regarding Socioeconomic Impact of Shocks

Q2. In which regions do you expect the socioeconomic impacts of COVID-19 and its aftermath to be most dire? Select up to two regions for each period.



Results from the online Future of Natural Resource Governance Survey carried out in late 2020 and 2021. N=325. Authors' calculations. Note that the total response percentage exceeds 100 percent because the respondent could select up to two choices.

What is the Future for Natural Resources in the Energy Transition era?

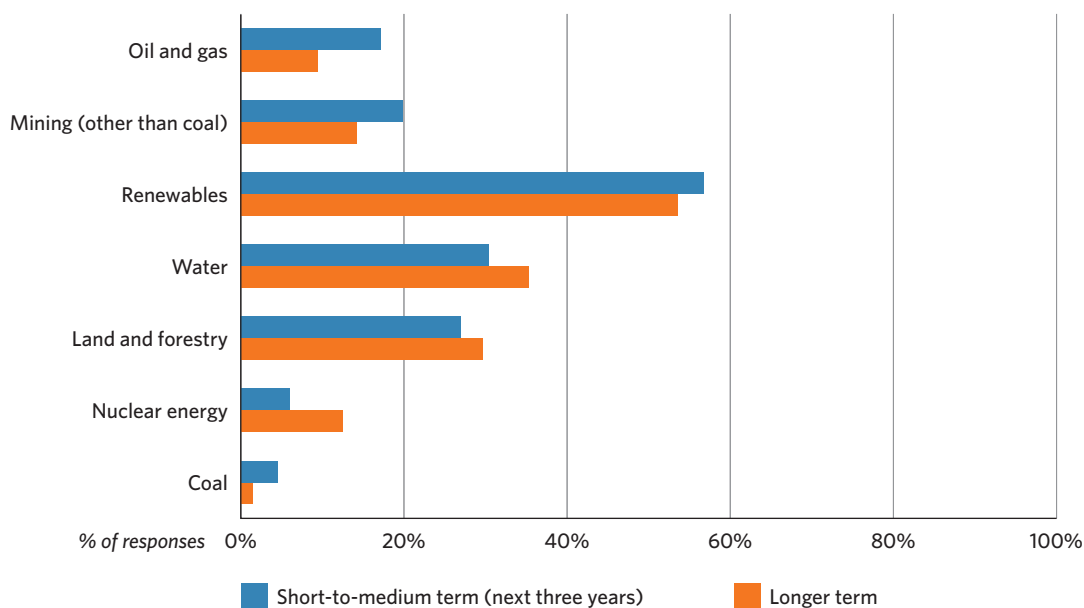
Regarding which natural resources ought to be prioritized in the future, we asked respondents for their views in the short-to-medium term (next three years) and in the longer-term time frame beyond. Some areas of consensus emerge from the overall responses, as well as notable differences and potential challenges for the field—some of which already were suggested in the analysis of earlier questions.

Respondents tend to have consensus that both in the medium and longer term a significant focus on renewables is warranted, followed by water, land, and forestry (see Figure 4). Further, there is also consensus on the other extreme of the (“fossil fuel versus green”) pendulum: For the most part, respondents point to the need to exit coal—the sooner the better. And of note is also the view that nuclear power deserves further support in the longer term.⁹

By contrast, there is a view that some support for the oil, gas, and mining sectors ought to continue into the coming three years, although, there appears to be less support in the longer term (see Figure 4).

FIGURE 4: Looking Ahead: Priorities in the Natural Resources Space

Q3. In the countries you work on, which natural resource should be further developed and supported? Select up to two choices for each period.

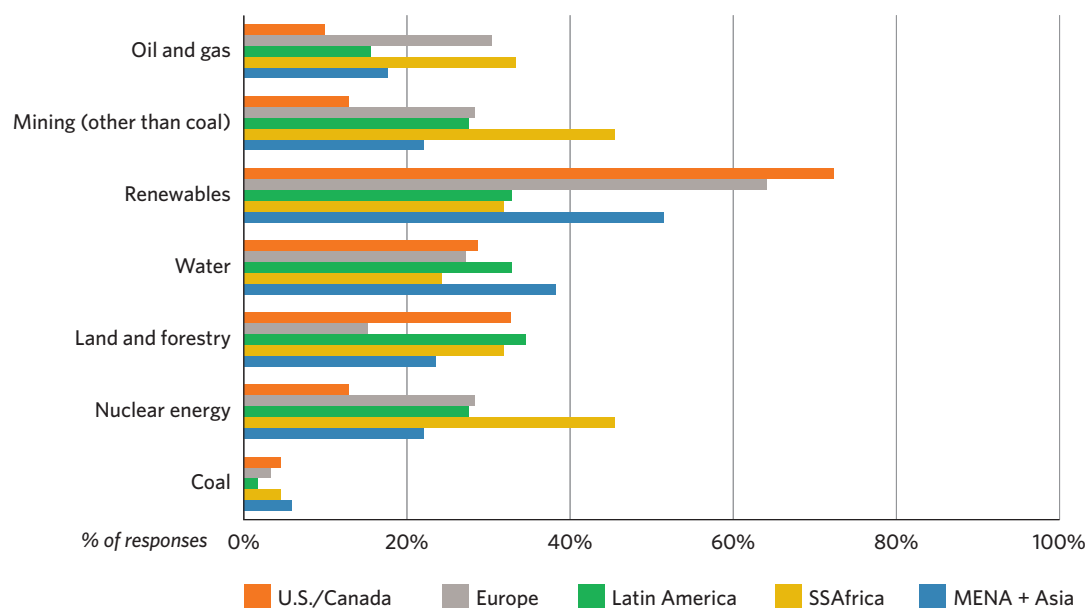


Results from the online Future of Natural Resource Governance Survey carried out in late 2020 and 2021. N=309. Authors' calculations. Note that the total response percentage exceeds 100 percent because the respondent could select up to two choices.

⁹ This response is significant given that until now the issues around nuclear power have generally been ignored among NGOs working on NRG.

FIGURE 5: Short-Term Priorities in the Natural Resources Space

Q3. In the countries you work on, which natural resource should be further developed and supported? Select up to two choices for each period.



Results from the online Future of Natural Resource Governance Survey carried out in late 2020 and 2021. U.S./Canada N=101, Europe N=46, Latin America N=29, SSAfrica N=33, MENA + Asia N=34. Authors' calculations. Note that the total response percentage exceeds 100 percent because the respondent could select up to two choices.

In large measure these divergent views stem from regional differences, with respondents from SSAfrica and Europe exhibiting higher support for oil and gas in the short-to-medium term (see Figure 5), although such support is far from absent in other regions.

There is also particular support for mining and nuclear power from SSAfrica respondents, and some from Europe and Latin America, while renewables garners very high support from respondents in the U.S./Canada, Europe, and MENA/Asia. Land and forestry has more support from the Americas and from SSAfrica, while water has support from the Americas and MENA/Asia (see Figure 5). Based on this sample of respondents, coal enjoys little, if any, support from any region (being mindful of the reality that some important governments continue to develop the coal industry).

Regarding regional differences in supporting particular natural resources in the long term, oil and gas still garners some support in MENA/Asia and in SSAfrica. See Figure 6 below for regional differences in the longer term.

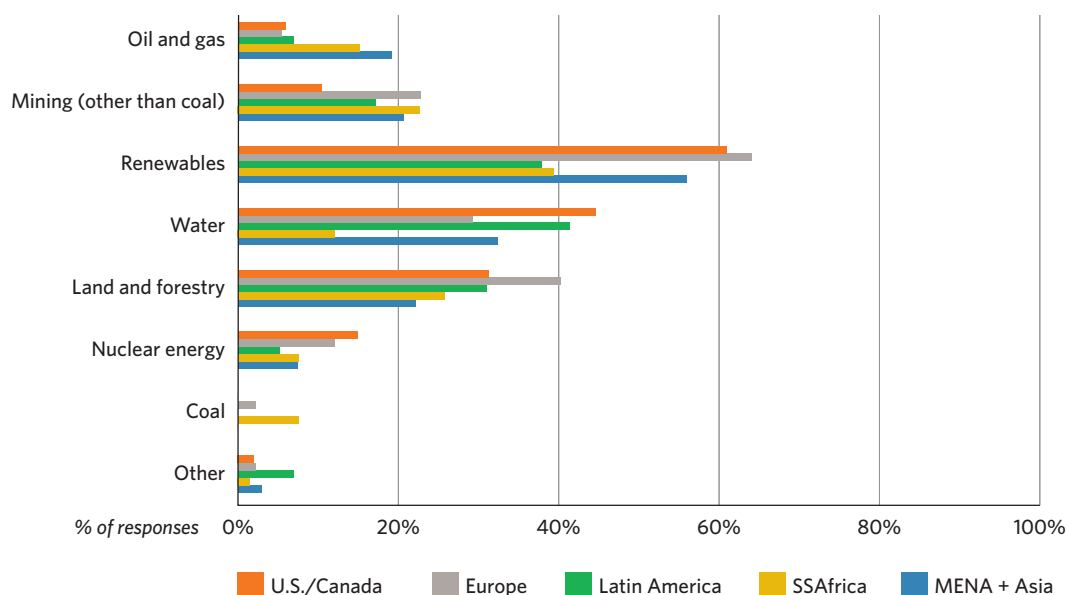
Overall, there appears to be a divergent approach to the time dimension across regions, as illustrated by the propensity of SSAfrica respondents to indicate that more time and/or gradualism may be needed. By contrast, the lack of support from U.S./Canada-based respondents for oil, gas, and mining in the longer term is noteworthy, a view which is shared by Latin America and Europe for oil and gas in particular. The picture is mixed for mining, since respondents from Europe and SSAfrica are still rather supportive of it in the longer term, as seen in Figure 6.

As mentioned previously, there is high support across the board for renewables, even if somewhat tempered in SSAfrica and Latin America. In the longer term, water enjoys major support in the U.S./Canada and Latin America, with MENA/Asia not far behind. Land and forestry is supported in the longer term—receiving broad support, but particularly in Europe—while nuclear energy is supported by the U.S./Canada and Europe in the longer term (see Figure 6).

Despite significant regional differences in responses regarding natural resource priorities, this is not the case for other respondent data such as background/field of work. An exception is that those in the NRG field are more likely to consider mining as a long-term priority compared to those outside NRG, while issues of water and land and forestry hold broad support regardless of background.

FIGURE 6: Looking Ahead: Long-Term Priorities in Natural Resources, by Region

Q3. In the countries you work on, which natural resource should be further developed and supported? Select up to two choices for each period.



Results from the online Future of Natural Resource Governance Survey carried out in late 2020 and 2021. U.S./Canada N=101, Europe N=46, Latin America N=29, SSAfrica N=33, MENA + Asia N=34. Authors' calculations. Note that the total response percentage exceeds 100 percent because the respondent could select up to two choices.

Major Reforms in Natural Resource Governance & Energy Transition Direly Needed—but how likely are they?

We asked respondents to rate different types of reforms needed in the future, in terms of both their *Priority* (Survey question 4), as well as how *Likely* they are to take place (Survey question 5).

Overall governance reforms related to rule of law and addressing corruption and capture top the list in terms of *priority* given by the respondents, closely followed by dedicated governance reforms for the

energy transition, and in turn followed by a major scale-up in transparency, accountability, and participation reforms (“TAP” reforms), and then by economic diversification (see Figure 7).¹⁰

Looking at the high *priority* given to these pending reforms, the picture differs regarding respondent views on the *likelihood* of such reforms. In fact, a major takeaway from the responses appears to be the extent of **anti-corruption and anti-capture reform pessimism** (or at least *trepidation*). These responses also indicate higher confidence in the likelihood to “protect past gains” such as those on transparency (see Figure 7).

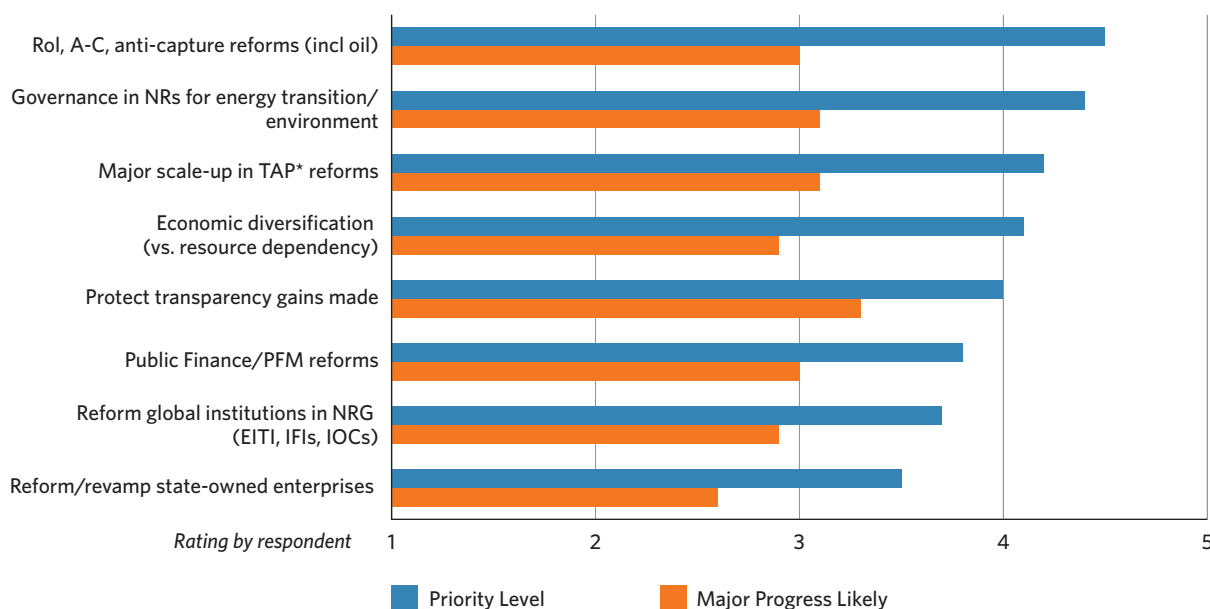
FIGURE 7: Which Reforms Ahead? Respondent Views on *Priority* and *Likelihood*

Q4-Q5. In your view:

a) how high a priority should each of these topics should be?

b) how likely is significant progress for each reform area?

Responses given for each topic are rated on a scale of 1 (lowest) to 5 (highest).



Results from the online Future of Natural Resource Governance Survey carried out in late 2020 and 2021. N=276. Authors' calculations.

10 Access to a synthesis and full TAP-Plus volume at <https://www.brookings.edu/research/the-tap-plus-approach-to-anti-corruption-in-the-natural-resource-value-chain/>.

Like the significant gap for overall democratic governance reforms, there is also a significant gap between the very high priority and the low perceived likelihood of the required specific governance reforms for the energy transition—even if the extent of pessimism on likelihood of reforms for energy transition is not as acute as with democratic governance reforms more generally (see Figure 7).

Are there salient differences across respondents regarding the priority and likelihood of reforms?

The results reported so far are averages for the overall sample and mask important differences across categories of respondents. We analyzed the data segmenting it by region, gender, age, and professional background. Noteworthy regional differences are apparent, particularly regarding the priority given to different reforms needed ahead, which we summarize here:

Regional contrasts

- Respondents from Europe give a lower priority than those from the U.S./Canada to overall governance reforms, yet both groups concur on such reforms being rather unlikely.
- A split is also apparent among the other regions: SSAfrica gives lower priority to governance reforms than Latin America and MENA/Asia.
- At the same time, SSAfrica does give high priority to TAP, public financial management (PFM), and economic diversification reforms.
- Notably, regarding priority reforms, there are large regional differences regarding governance in natural resources for the energy transition, particularly between SSAfrica (low priority) and the other regions, with the highest priority being given by the Americas (U.S./Canada and Latin America).
- In terms of likelihood of reforms, the differences across regions are not very significant; generally, the regional averages are similarly low.

Stakeholder contrasts:

- Some variations in terms of priorities and likelihood are apparent across stakeholders, particularly between independent (civil society/academic-think tank/citizen) respondents versus the official sector (governmental/multilateral/industry).
- Yet possibly noteworthy in this case is a similarity: Civil society writ large is no less pessimistic regarding the likelihood of the high priority reforms (governance and the energy transition) than officialdom (the officials in an organization or government department, considered as a group). This “pessimism” raises questions around possible civil society reticence and/or conservatism, to be discussed further in the concluding section.
- Beyond pessimism about the likelihood of reforms, some conservatism is suggested by the priority ratings as well. Specifically, the civil society/independent group of respondents is more reticent than “officialdom” regarding rating as a high priority *most every area of reform* (particularly transparency, TAP, PFM, international financial institutions, and somewhat Rule of Law/Corruption), with the exception of reforming SOEs, where civil society does give it a higher priority than other groups.
- On governance reforms in the energy transition and on diversification, both of these stakeholder groups give these reforms the same priority. This similarity is a finding of interest as well, since in such difficult reforms with entrenched interests the *a priori* expectation would be that civil society gives it a higher priority.

- Regarding likelihood of reforms, civil society/independents are even more pessimistic than “officialdom” on balance across reforms, and in particular with regard to governance, PFM, and major TAP reforms. A contrasting exception is in the likelihood of reforms of international financial institutions (IFIs), where the independent stakeholders are less pessimistic. Regarding the likelihood of reforms of SOEs, as well as governance reforms for climate change and diversification, both groups are equally pessimistic.
- Of course, a modicum of perspective is in order on the variations in likelihood of reforms since a general pessimism is prevalent across groups and types of reforms. But, the particular pessimism bias apparent among civil society respondents is worth further probing.

Age and gender matters

The gender dimension, and its interface with age, appears to matter as well:

- Both genders seem to prioritize the various reforms, although female respondents give the reforms a higher priority overall.
- Women tend to view reforms as more likely than men, even if neither give high likelihood to most reforms. Such differences generally persist across age cohorts.
- These average results mask some variance across reform types. Notably, women think that democratic reforms are slightly more likely to take place than men, while also perceiving that improved governance to support the energy transition is even more likely. This difference regarding the higher likelihood of reforms for the energy transition is particularly notable for younger women.

Placing the general pessimism regarding the likelihood of priority reforms in perspective, it is important to emphasize that the survey responses also hint that not all is dark. Drawing from insights from the written answers to the open questions, there is hope from the extent and scope of suggestions for particular initiatives and reforms that were written into the survey responses.

Further, there was a minority of respondents, comprising about 10 percent of the sample, which provided a set of concrete (and potentially bolder) suggestions in their written answers. In fact it turns out that this “concrete and bolder” respondent group also gave less pessimistic responses to the multiple choice (closed) question on the likelihood of priority reforms than other respondents. This hints at pathways of engagement for reforms ahead, as mentioned in the concluding section.

What are Future Regional/Country Priorities?

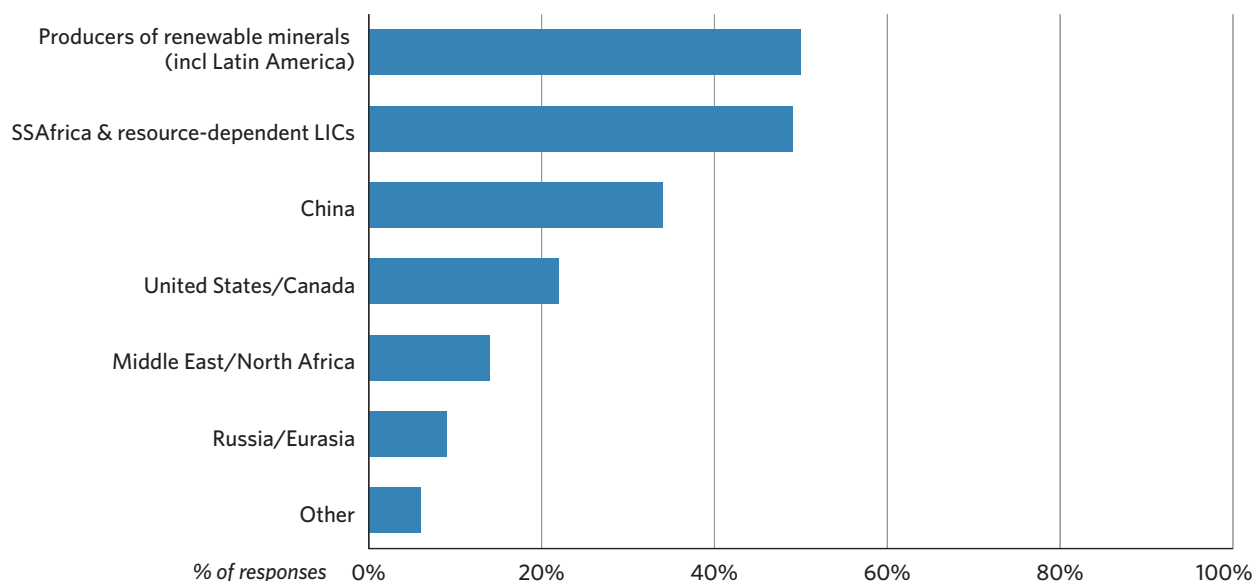
When survey respondents were asked which regions deserved further focus and support in the future, as presented in an earlier section on the overall socio-economic impact of COVID-19, unsurprisingly there was a consensus that both Latin America and SSAfrica were the highest priority regions, the former also related to renewable minerals. In Survey question 6, we also asked about the regional/country and related priorities ahead, specifically in natural resources. Note that in the question, the two top priority countries / regions (SSAfrica and Latin America) both include qualifications (resource-dependent LICs and production of renewable minerals) for identification purposes only. The results show clearly that *Latin America and SSAfrica emerge again*, followed by China, with the U.S./MENA/Eurasia lower down (see Figure 8).

Regarding future regional priorities, there is consensus across different stakeholders and by respondent background, except that NRG specialists and to

an extent civil society groups that further focus on China (versus on the U.S.) is warranted, contrasting non-NRG respondents as well as “officialdom”.

FIGURE 8: Which Countries/Regions Need Priority Engagement Looking Ahead?

Q6. Compared with the focus so far, which of the following countries/regions should be considered for priority engagement ahead? Select up to two priority regions.



Results from the online Future of Natural Resource Governance Survey carried out in late 2020 and 2021. N=262. Authors' calculations. Note that the total response percentage exceeds 100 percent because the respondent could select up to two choices.

IV. Conclusions and Implications: *Audacity Needed?*

Sobering reality and results

The survey on the future of the NRG field features important insights across many dimensions, with notable differences across time, space, type of stakeholder, sectors, generations, and gender. Some survey results challenge preconceived notions, while others may not have feature prominently on the radar screens of many. They warrant attention and have implications.

There is still substantial support for a focus on oil and gas, and more so for mining (other than coal). Such support is also prevalent among many in civil society and in the NRG space. And it may not be waning quickly in the medium term. This is markedly the case in resource-dependent regions such as MENA and Sub-Saharan Africa. And while there is general acceptance on the need to focus on energy transition and renewables, they are more of a priority in the global North. There are also differences regarding the scope and pace of the energy transition, with many appearing to prefer a gradual approach.

While stakeholders are of the view that democratic governance reforms—encompassing improving rule of law and democratic voice as well as addressing corruption and state capture—are a top priority, they are pessimistic regarding the likelihood of such reforms taking place. Such pessimism prevails across the various stakeholders, including civil society. There is a similar gap and considerable skepticism

about the likelihood of specific governance reforms (including in natural resources) to support the energy transition.

This is telling: If reform around these issues ought to be a priority, but stakeholders working in the field view progress as unlikely, a case can be made to do things differently. We offer some reflections below.

Shifts in perspective

The need for a shift is further backstopped by reviewing the time dimension in the survey questions and responses and placing these against today's global perspective. The stark world reality suggests that the COVID-19 pandemic during 2020 and 2021 is morphing into the medium term. The COVID-19 pandemic, rather than largely disappearing by the end of 2021, has traversed from the earlier pre-vaccine panic times to what may turn out to be a more manageable, yet persistent and uncertain, endemic phase.

Yet the survey results from the first half of 2021 pointed to the respondents' expecting that the public health challenge would quickly wane in most of the world, providing renewed "space" for the energy transition and other reforms in the medium term.

This matters, because over the past two years such missing space—or "bandwidth"—was often the

justification for lack of progress, or even retreat, regarding major reform areas outside the public health challenge and the concomitant socioeconomic protections. For instance, there has been a weakening in helping address longstanding governance challenges by the IFIs during this period, as well as a more lax implementation of the EITI standard.

Scenarios

The increasingly endemic public health reality combined with deteriorating levels of democratic governance in many important countries around the globe—in turn raising global tensions and actual conflict—suggest that a reframing of the debate on paths forward may be in order. Framing the debate around two contrasting options in how to approach major challenges and reforms in the future may help at this stage.

At one side of the spectrum, considering at face value the prevailing short-term challenges, a “dynamic status quo” option would continue to presume that there is limited reform bandwidth available for NRG reforms and energy transition. Under this scenario, this would be the case because the attention will continue to be centered around urgent matters of public health, the economy, and national security, within binding “bandwidth” constraints.

For perspective, this “dynamic status quo”, while evolutionary, still allows for progress over the rather static status quo views by many in pre-pandemic times, where the work on democratic governance, including corruption and capture, as well as on energy transition, were often niche or pilot topics.

Indeed, the seemingly paradoxical label of “dynamic status quo” for this scenario draws from the notion that prioritization of urgent short-term areas for action continues to be justified (the “status quo” aspect), yet at the same time

evolutions may continue to take place particularly within high priority areas (the “dynamic” aspect). In other words, under the new realities it is no longer relevant to even explicitly consider a very static and traditional (pre-pandemic) “business as usual” scenario, which would simply project the past forward with minor tweaks. Instead, a somewhat more dynamic scenario—even if reforms are circumscribed, partial, or gradual—is considered as relevant as the “base case” and attuned with much of the field’s current reality.

In fact, an evolutionary set of reforms, such as those on transparency in natural resources regarding the energy transition and climate risks—as well as protecting past gains on transparency—may continue to take place under a “dynamic status quo” scenario. Other examples could include improved corporate governance and transparency in some national oil companies, and further light shed on the social costs and benefits in the development of critical minerals, such as lithium.

In the future a case may be made to continue to promote a “dynamic status quo” evolutionary scenario, since it could confer benefits to some stakeholders in the field. Such an approach may be consistent with managing risks and “picking winners,” thus showcasing selected successes, even if the overall impact may not be significant.

But it is worth pausing to draw insights from the survey itself and couple them with the admittedly mixed past impact of the overall efforts and interventions in the NRG field and with the starker geopolitical, antidemocratic, conflict, and public health realities of today. In doing so, we ought to also consider the possibility that to face the current challenges in governance generally, and for natural resources and the energy transition in particular, an evolutionary scenario may prove to be insufficient at best. Seriously considering a scenario infused with audacity is warranted as well.

Audacity

Such an alternative “audacity scenario” would consider the dire current global realities and aim at a bolder and more encompassing effort. It would require challenging (or, concretely, “relaxing”) the frequently mentioned “capacity/reform bandwidth constraint.” It would mean ceasing to view institutional capacity and political capital for reforms, as well as civil society and industry bandwidth, as strictly capped, as it has tended to be viewed in the past. It would also mean challenging the notion that reforms are always highly demanding in resources and institutions and in competition with each other.

Instead, under this scenario, complementarities among reform areas would need be explored and exploited much further. Working jointly—across different types of organizations, including considering new alliances—and concurrently, on various reform areas, would be warranted. Consideration could take place of close partnerships, possibly mergers, between organizations working in the NRG space with those in climate change and water, as well as those fighting state and kleptocratic capture and corruption. And within the NRG and the energy transition space, forging deeper alliances between NGOs/think tanks and investors would also be fruitful.

Clearly, the notion of tradeoffs would continue to be relevant, and thus the need for strategic prioritization and accounting for political and budgetary realities. Yet this could take place within an expanded scope of reform areas. In short, and in economist lingo, the “audacity” scenario would envisage an augmented “reform production possibility frontier (PPF).” In addition to audacity itself and collectively “going the extra mile”, and to exploiting complementarities and mitigating tradeoffs, *innovation* could be an important contributor to augmenting the PPF for reform. This would obviously specifically apply to the NRG reform field as well.

An honest and open debate about the need, realism, and pros and cons of an “audacity” scenario may be timely. As highlighted, a salient result of the survey is

that there may be ingrained skepticism or pessimism—notably even within civil society as well—regarding the likelihood of much needed changes and reforms across key areas of democratic governance and the energy transition. This in contrast to the high level of comfort to the prospects of focusing on past priorities, such as on transparency gains made years ago.

An area of possible innovation to raise the level of “audacity capital” in civil society may reside in “who” is attracted to work on these issues, on the incentives faced by them, and on the process and content (the “how” and “what”). It materially makes a difference who is attracted to boardrooms, management, and staff in think tanks/NGOs (some of which may have become closer to official agencies over the years, partly driven by the incentives to be aligned with donor funding priorities).

As mentioned, the survey results hint at a certain conservatism and possible risk aversion, including among civil society participants. Similarly, regarding the “how” and “what”, the survey result pointing to the more involved participants who offered concrete initiatives, and believe that major reforms are more likely, does offer a window for further modalities of concrete engagement ahead. This could also feature in a future debate. And the survey results regarding age cohorts and gender offer a hint: while interpretative caution in generalizing from small samples is in order, it is noteworthy that younger women are of the view that energy transition reforms are not as unlikely as seen by other groups.

Because of sample size considerations, and the fact that the differences across the gender and generational dimensions are not so large and subject to group variance, it would be incorrect to infer that there is a need to focus on one type of recruits to the field. Yet at a more general level the apparent extent of caution and risk aversion in the NRG field would suggest that an injection of “fresh blood”, such as experts and activists in the energy transition and in new frontiers of governance—including in data/AI activism, capture and tyranny—may be worth considering as well.

A Shift in risk/reward calculus?

Technical presentations and discussions abound in government ministerial cabinets and in senior management and boardroom meetings regarding tradeoffs between risk and reward. *A priori*, given what is at stake and the apparent incentive structures, it could have been expected that the preferred balance may lie closer to the lower risk/lower reward quadrant among governments and large companies than among NGOs.

Civil society organizations may have been expected to take higher risks—ambitious undertakings—and thus prepared to be successful in a smaller share of initiatives and programs. Yet the (rarer) successes would be particularly impactful. Unfortunately, such calculus and strategizing may not have been the norm among many NGOs, given the issues around board/staff composition and donor funding incentives mentioned already.

Consequently, a fresh discussion on the desired appetite for risk-taking in this new era, and their implications, is warranted. If a more audacious scenario is embraced, a higher appetite for risk would be called for, while the opposite would be the case under the first “evolutionary” option. Obviously, such a discussion should be informed by the drivers of risk aversion, of which there will be at least a few—such as complacency of sorts (“minimizing boat rocking in one’s job”), “bean counting” incentives to show high rate of “project success,” whether ultimately very impactful or not, and, related, the role of funders.

Concrete innovations are possible—the regional dimension

Unsurprisingly, the analysis of the survey reveals important regional differences. A full treatment on how to address these, and particularly if more

audacity will need to be in order, is beyond the scope of this contribution. Yet it needs to be done, considering departures from traditional approaches in the past where the case for country/regional “tailoring” tended to morph into incrementalism and less ambition. Further, global “public bads” resulting in large negative externalities (such as climate change) were ignored when taking an overly country-specific tailored approach.

Here again, innovations in unlocking real change and reform in different regions and countries, yet still accounting for their different realities, may offer a path forward in considering an “audacity scenario.” Under this scenario we posited that there is a need to consider complementary areas of reform in tandem, akin to reform twinning. Coupling this with the regional differences that emerge from the survey, several concrete illustrative ideas for debate emerge around the notion of regional “grand bargains in reform twinning.”

In the case of Latin America, important stakeholders and countries are promoting major increased development of mining, including in lithium for instance. Others oppose the notion of mining being an engine for development in the region due to the significant ecological challenges surrounding the availability and sustainability of fresh water, among other things. Twinning reforms on both the mining/ NRG and water sectors, which would entail umbrella integrative reforms in regulatory and corporate governance in these areas, may offer a more convergent path forward. For instance, at this very juncture Chile is grappling with these issues.¹¹

Similarly, in SSAfrica the regional realities of oil, gas and mining dependency, climate justice considerations, and sputtering attempts to promote economic diversification and improved governance (including in natural resources), could be viewed afresh. This could be done by a different approach to twinning reform areas. Specifically, a possible grand bargain of

¹¹ Some of the experiences and lessons being learned in Latin America may also be relevant for improved governance in managing critical minerals in some countries in SSAfrica.

a different sort may be considered, such as a major donor-funded compensation mechanism for energy transition and diversification in resource dependent countries in the region, for which improved governance would again be essential for success.¹²

Further, the survey responses provide a hint for gas-dependent Europe as well, even before the seismic shift brought about by Russia's invasion of Ukraine. Given the new war on the continent, its regional geopolitics, and the realistic time path to scale-up renewable energy, an urgent and deliberate rethinking of the pros and cons of complementing renewable energy—which will take time to supplant fossil fuels—with further reliance on nuclear power is called for. Again, until now this has been an issue that civil society in the NRG space has been reticent at best to address. Yet as part of an audacity scenario under the dire current realities, the field needs to be prepared to engage on controversial issues. This is particularly relevant in times of major conflict, particularly as they do relate to (the “hard governance”) aspects of the resource curse.¹³

Beyond regional approaches, the “reform twinning” approach may also be useful in thinking afresh, with more audacity, in terms of reform themes in NRG, and beyond. Take poorly performing National Oil Companies (NOCs) for instance. Past attempts to induce incrementalistic changes on financial transparency or corporate governance do not appear to have been generally successful—despite significant efforts. Yet at the same time there has been a long-standing reticence

to address head on the question of whether some of these institutions are “reformable” at all. If the answer may be in the negative in at least in some longstanding cases, it will not suffice to merely suggest dissolution or divestiture of a perennially nonperforming NOC without a strategy via a well governed process. Transitional institutional arrangements filling the void of such an NOC would be needed, for instance.¹⁴

At a broader level, beyond the field of NRG, the new realities argue for audacity for instance in the public health field as well, where integration with governance approaches may be warranted. Audacity in these times of tyranny and conflict also means challenging the continued focus on, and use of soft notions such as “closing civic space” and “promotion of public debate” when a tougher approach is needed.

A Stakeholders compact

Audacity in short supply does not appear to be concentrated in a particular stakeholder or group. The above emphasis on considering strategies to embolden civil society—since it should be part of its DNA—doesn't imply that it would be justified for other stakeholders to evolve incrementally at best. Progress will not take place without governments, the private sector, donor agencies, multilateral organizations, and initiatives on board—all supported by civil society. Much has been written and is known about the incentives governing cautious and risk averse

12 The focus on climate change compensation mechanisms—where their funding and implementation has been lagging—has so far largely been on helping vulnerable countries mitigate effects of climate change and the funding of some renewable projects. Little attention has been given to the major needs of poor, resource-dependent countries with large reserves, an underemphasized aspect of climate justice.

13 As noted in footnote 1, this document was being readied for publication as Russia's invasion into Ukraine was at an initial stage, and thus its additional implications are not substantially addressed here. Suffice to mention that such developments backstop even further the call for the field to weigh on the “hard governance” dimensions of the resource curse, such as state and kleptocratic capture (and tyranny) as well as the role of corporates and the governance obstacles to decisively moving away from fossil fuels. Addressing these harder dimensions of governance would imply a major shift from the conventional set of issues in the NRG field, such as the TAP troika and the traditional approach to “energy transition.”

14 Further, even if reform options short of dissolution of an NOC are considered, it is important to shy away from partial and incremental measures—such as a single area of financial transparency—and instead focus on the comprehensive package of institutional and governance reforms—full commercialization and market discipline, governance refresh, independence, etc.—without which there will not be sufficient progress.

behavior by such stakeholders, which is beyond our scope here.

Yet less attention is being given to bold innovators among some of these well-known stakeholders, showing “the art of the possible,” such as the recent case of a small private fund, Engine 1, which shook the Board of Exxon and paved the way for other activist investors to be bold. Likewise, some country governments are stopping fossil fuel extraction, and a few multinationals in extractives are already seriously starting to integrate energy transition into their strategies.

In fact, it would be misguided to view each stakeholder as monolithic—or labeling all as relatively evolutionary or “incrementalist”—regarding future plans. The reality is that group averages mask significant variation within each stakeholder, where there are leaders and members viewing significant change as both necessary and feasible, and thus prepared to forge ahead boldly taking risks.¹⁵

Against such background, forging more multistakeholder alliances among agents of change ought to be considered. A multistakeholder initiative such as the Extractives Industry Transparency Initiative offers a case study to dig deeper and draw some positive lessons, but also rather sobering ones, regarding these issues.¹⁶ Similarly, reviewing the slowdown in IFI support for governance reform is also due.

Ours is but one contribution to a broader strategic debate. A full debate on the concrete implications emerging from this survey and subsequent major developments would require drawing on other work as well, including other efforts to elicit stakeholder views.¹⁷ It would also entail taking in other efforts where political economy assessments of the constraints to change have been made.¹⁸

Yet in doing so, considering the results and arguments presented here, it would also be important to consider the possibility that there has been a tendency toward “incremental self-selection bias”, beyond the natural risk aversion in many settings. This is because we need to recognize that past progress in the NRG field has been less than stellar in most countries and globally, and that recently dramatic adverse global developments have taken place in the energy transition, and in democratic governance and geopolitics more generally.

In addition to these adverse global developments, there are risk averse incentives from funders and a tendency in political economy analysis, in feedback from experts working in the field, and in boardrooms, to err on the side of emphasizing the extent and intricacies of the observed dire constraints and in expecting a very high rate of success in initiatives undertaken. This means that a bias against imagining the “art of the possible” and against taking risks to try and attain inordinate impact may persist—conspiring at times against an authorizing environment

15 At its inception, the Open Government Partnership (OGP) aimed at identifying reform champions among leaders in government and civil society.

16 EITI was originally conceived almost two decades ago with the aim to improve governance and address corruption in natural resources. It secured important global transparency gains in NRG over the years, including on transparency, accountability, and for a period in protecting some in EITI's civil society. In recent years it may have settled into a status quo, with incremental evolutions around some traditional disclosures, despite fast-evolving global realities. This has been partly due to the aversion to change by some influential EITI industry members and supporting country governments, the adverse impact of pressures by nondemocracies, and due to pessimism of some stakeholders about what is attainable. The EITI case in the larger call for audacity deserves further attention and study.

17 See for instance the results of scores of interviews conducted by NRGi for its strategic purposes ([video](#)). Further, the results of the survey presented here may also have implications for future analytical and monitoring initiatives in the field, such as vis-a-vis how to approach the [Resource Governance Index \(RGI\)](#).

18 See for instance [CCSI's recent publication](#) on political economy constraints drawing from the insights from a longstanding project on the subject.

to imagine a bolder vision to break free from those constraints.

The challenge ahead will be to manage concerted and intertwined progress on public health, socioeconomic recovery—with justice—progress in democratic governance and challenging tyranny, as well as addressing corruption, capture, conflict, and climate change.

For this, considering a scenario with more audacity—taking risks in the face of very real challenges—may

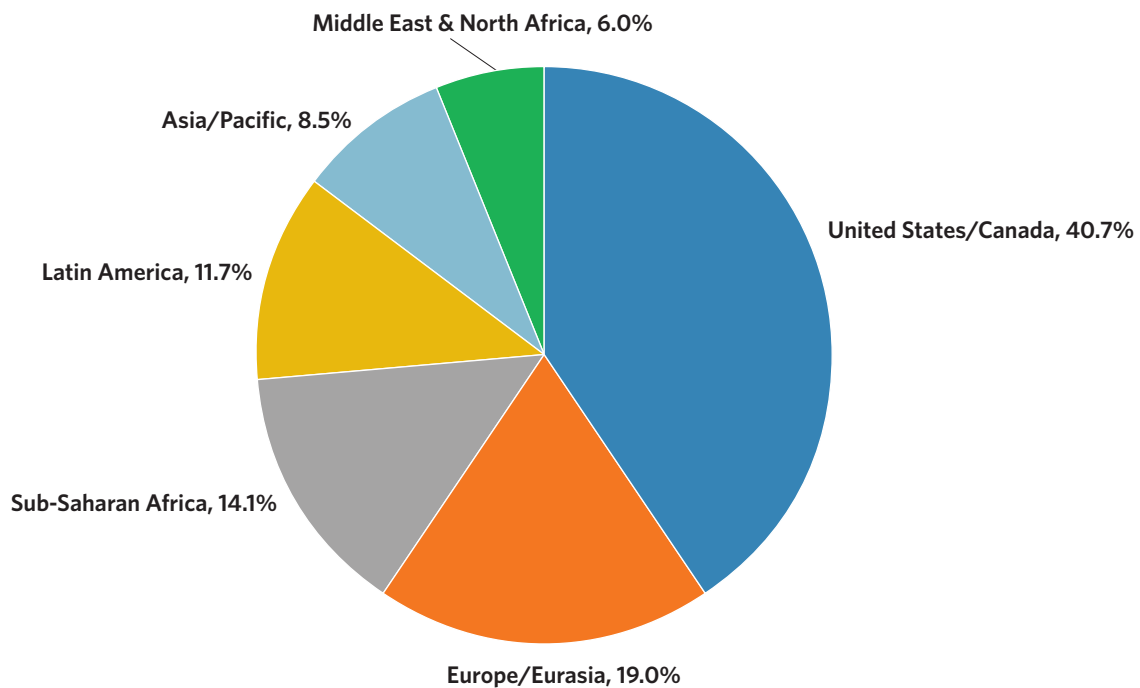
be essential to attain significant and concrete impact ahead. Incremental evolutions, or cherry-picking “lower-hanging fruits” to guarantee showcasing “winners,” are unlikely to have the required impact. A forward-looking strategy would have to consider what will affect real change from all like-minded stakeholders and institutions. We are far from there at present. Yet a bolder approach that engages differently with a broader spectrum of civil society, progressive investors, industry leaders, and reformist leaders in government and global organizations, could make a huge difference.

V. Annex A: Basic Stats on Survey Respondents

The total number of survey respondents was 383, but two had practically no answers. Further there was a fraction of respondents whose responses were found to be void as they repeatedly selected most every choice in the multiple choice questions—respondents had been instructed not to exceed

two choices. Thus, the overall number of usable responses was 353. Not all respondents answered all questions, leaving some blank. The distribution of number of respondents by region is provided below.

FIGURE A1: Respondents by Region



These calculations exclude those participants who didn't answer this question.

VI. Annex B: The Future of NRG Survey Data & Analysis

Original Survey Questions

Q1. In your view, what are the two most important priorities in the country or region you are working on: in the short term (through the end of 2021) and in the medium term (2022 and beyond)? Select up to two choices per period.

Q2. In which regions do you expect the socioeconomic impacts of COVID-19 and its aftermath to be most dire? Select up to two regions for each period.

Q3. In the countries you work on, which natural resource should be further developed and supported? Select up to two choices for each period.

Q4. In your view, please rate the priority *each* of these topics *should* get in order to attain progress in natural resource governance in resource-dependent countries. Rate each topic on a scale of 1 (not a priority) to 5 (highest priority).

Q5. Now, in your view, please rate *how likely* it is that major progress may take place on each topic. Rate each topic on a scale from 1 (highly unlikely) to 5 (highly likely progress).

Q6. The natural resource governance field (including donors, government agencies, civil society/NGOs, EITI, and international financial institutions) has largely focused on resource-rich emerging and developing countries. Ahead, which countries/regions should be considered for priority engagement? (Select up to two choices)

Q7. If you could launch one concrete initiative to address one natural resource governance challenge only, what would it be? (Brief write-in, maximum 30 words)

Q8. To make significant progress, what, in your view, should either official global institutions (such as the EITI and G7/20), industry, donors, or NGOs do differently going forward? Please focus on one of the main players mentioned. (Brief write-in, maximum 30 words)

Q9. In what region do you live?

Q10. Age range

Q11. Gender

Q12. Organizational affiliation

Q13. Main professional background (select one)

Q14. Your name (optional)

Q15. Country where you currently live (optional)

About the Authors

Daniel Kaufmann is the co-chair of the advisory board for the Leveraging Transparency to Reduce Corruption (LTRC) initiative. He is also a senior fellow at Results for Development (R4D) and a nonresident senior fellow in the Global Economy and Development program at the Brookings Institution. He serves as a Natural Resource Governance Institute (NRGI) president emeritus and a member of NRGI's advisory council.

Mario Picon is the director of LTRC, a joint initiative of Brookings and Results for Development.

This paper solely reflects the views of the authors. Any errors are those of the authors alone.

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