



European
Partnership
for Responsible
Minerals

Small-scale gold miners in Migori, Kenya
Professionalising ASGM in Kenya and Uganda led by The Impact Facility

Fostering responsible artisanal
and small-scale mining for reliable
mineral supply chains



Executive Summary

Minerals are essential for the twin green and digital transition. Increasing demand and geopolitical developments have made securing reliable mineral supply chains a top priority for governments and companies. Importantly, mineral supply chains cannot be reliable, secure, and resilient unless they are also responsible and sustainable. **Since its inception in 2016, the European Partnership for Responsible Minerals (EPRM) has been at the forefront of fostering reliable supply chains by promoting the responsible production and sourcing of minerals.**

The EPRM focuses on artisanal and small-scale mining (ASM) – a sector of global impact and scale – in high-risk regions. With most attention in policy and industry circles on industrial mining, the significance of ASM is often poorly understood, underestimated, and neglected. Yet, ASM significantly contributes to global (critical) mineral supply chains. Approximately, 25% of global tantalum and tin supplies, 20% of gold as well as 12% of cobalt derives from ASM operations.

ASM operations also increasingly target other minerals, including manganese, copper, and lithium. In addition, it generates substantial revenues in producing regions, injecting capital into local, regional and national economies. This offers significant opportunities for economic empowerment to populations who often live in rural areas marked by high levels of poverty and few alternative viable livelihood opportunities. In many regions, ASM represents the largest source of nonfarm rural income, supporting the livelihoods of more than 225 million people worldwide.

As a unique Multi-Stakeholder Initiative, the EPRM plays an crucial role in fostering reliable and responsible mineral supply chains in a context of increasing competition and concerns over supply security. The EPRM brings together governments, supply chain actors and civil society organisations, complemented with key institutional stakeholders. The EPRM promotes compliance with the Organisation for Economic Co-operation and Development Due Diligence Guidance in line with legislative frameworks, such as the European Union’s Responsible Minerals Regulation, Batteries Regulation, and Corporate Sustainability and Due Diligence Directive.

Strategic orientation of the EPRM

The past decade has witnessed rapidly evolving mineral, geopolitical, and regulatory landscapes. This has prompted the EPRM to strategically assess and refine its orientation to:

- 1. ASM activities in high-risk regions that supply international markets:** The EPRM focuses on all minerals that are mined by ASM operations in areas where human rights are at risk. Minerals that are covered by the EPRM must be part of international supply chains.
- 2. Responsible ASM and responsible sourcing practices in alignment with OECD Due Diligence Guidance:** The EPRM promotes compliance with the OECD Due Diligence Guidance in line with legislation to address environmental, social, and governance issues as well as human rights risks in mineral supply chains.



Responsible is reliable

ASM can support a more diversified minerals supply by responding swiftly to demand pressures.

Ensuring this forges reliable supply chains requires that companies and governments responsibly engage with ASM in a coordinated and sustained fashion, especially in high-risk areas. Linking stakeholders along the supply chain, the EPRM fosters both responsible production and sourcing. The EPRM approaches responsibility from a holistic perspective that combines social, environmental and governance concerns. To the EPRM:

- **Responsible ASM** respects and facilitates the interests of people and environment, striving to maximise benefits while minimising negative impacts.
- **Responsible sourcing** aims to maximise the benefits of mining while minimising its negative impacts, ensuring that the process of turning raw materials into a consumer products aligns with global due diligence standards. The EPRM further emphasises a proactive commitment to engaging with and sourcing from responsible ASM.

Multi-Stakeholder Initiatives are essential

Fostering the responsible mining and sourcing of minerals requires a collaborative commitment.

Multi-Stakeholder Initiatives play a crucial role in this process. By bringing together diverse perspectives, expertise, and interests, they harness the strengths of each stakeholder, promoting coordination that maximises positive impact. The EPRM offers a secure space for dialogue, learning, and networking while developing innovative initiatives by funding collaborative projects.

EPRM’s working principles: inclusive and knowledge-driven engagement with ASM

To achieve its **vision of responsible mineral supply chains in which ASM operations are formally incorporated to the benefit of supply chain actors’ access to reliable mineral supply chains, mining communities’ wellbeing, and producing countries’ development objectives**, the EPRM commits to:

- 1. Inclusivity** – Engaging governments, supply chain actors, and civil society as well as other key stakeholder in the mining ecosystem to optimise impact and integrate diverse perspectives
- 2. Knowledge-driven approaches** – Grounding the EPRM’s work in tangible contexts, investing in knowledge-building, data collection, and capacity building.
- 3. Active engagement** – Supporting projects that facilitate responsible ASM operations and linking them with international markets through multi-stakeholder collaborations.

Collaborating for reliable and responsible mineral supply chains

Through inclusive and knowledge-driven engagement with ASM and the diverse set of stakeholders that shape mineral supply chains, the EPRM engenders multi-stakeholder collaboration, promotes knowledge-driven decision-making, and ensures that ASM’s contribution to reliable and responsible supply chains is recognised and integrated. The EPRM convenes stakeholders from across mineral supply chains to ensure that supply chain actors and producing regions benefit from responsible mining as ASM communities improve their working conditions, social protections, and access to international markets. By strengthening due diligence, supporting scalable projects, and deeper engagement across the supply chain, the EPRM continues to drive meaningful change.



The EPRM's mission, vision and ambitions for reliable and responsible mineral supply chains

The EPRM is a **multi-stakeholder initiative** that promotes and supports the responsible production and sourcing of minerals with a focus on ASM in high-risk areas. The EPRM supports compliance with the OECD Guidance in line with due diligence legislation. Bringing together governments, supply chain actors, civil society organisations, and key institutional stakeholders, the EPRM works to address challenges and leverage opportunities in the ASM sector to ensure its integration into reliable and responsible mineral supply chains.

The EPRM's core **mission** is to improve mining practices in the ASM sector, to bring better social, environmental and economic conditions for mine workers and local mining communities, to ensure that supply chain actors gain necessary learning or tools for implementing due diligence practices in compliance with international standards, and to ensure that responsible ASM can access international markets.

Through this mission, the EPRM leverages the value, scale and potential of ASM, and pursues its **vision** of responsible mineral supply chains in which ASM operations are formally incorporated to the benefit of supply chain actors' access to reliable mineral supply chains, mining communities' wellbeing, and producing countries' development objectives.

The EPRM is committed to three **ambitions**:

- Ambition A - to promote the responsible production of minerals
- Ambition B - to promote the responsible sourcing of minerals
- Ambition C - to link production and sourcing





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Acronyms

Acronyms	Explanation
3TG	Tin, tungsten, tantalum, and gold
ASM	Artisanal and small-scale mining
CAHRA	Conflict-affected and high-risk areas
EU	European Union
EU RMR	EU Conflict/Responsible Minerals Regulation
EPRM	European Partnership for Responsible Minerals
IEA	International Energy Agency
IGF	Intergovernmental Forum on Mining, Minerals, Metals and Sustainable Development
ILO	International Labour Organization
MSI	Multi-stakeholder initiative
OECD	Organisation for Economic Co-operation and Development
UN	United Nations





Introduction

Securing a reliable and responsible supply of the minerals essential for low-carbon energy and digital technologies has become a top priority for governments and companies. While much of the focus has been on industrial mining, the significant contribution of artisanal and small-scale mining (ASM) remains poorly understood or even neglected. ASM not only accounts for significant volumes of global production—including critical minerals such as cobalt, tantalum, and lithium—but also generates substantial revenues in producing regions and supports the livelihoods of more than 225 million people worldwide. Since its inception, the European Partnership for Responsible Minerals (EPRM) has been at the forefront of promoting responsible production and sourcing of minerals with an explicit focus on ASM in high-risk areas.

The past decade has shown a rapidly evolving minerals landscape and a number of interconnected regulatory and geopolitical developments. These dynamics have prompted the EPRM to evaluate, refine and expand its orientation to guarantee it maintains its essential position in fostering reliable and responsible mineral supply chains.

This White Paper describes a strategic reorientation to position the EPRM as a vital multi-stakeholder initiative (MSI) for fostering reliable and responsible mineral supply chains that translate sustainable development opportunities that are unique to ASM to results on the ground. Through inclusive and knowledge-driven engagement with ASM, and the diverse set of stakeholders involved in mineral supply chains, the EPRM engenders multi-stakeholder collaborations, promotes knowledge-driven decision-making, and ensures that ASM's contribution to reliable and responsible supply chains is recognised and integrated. The EPRM expands its focus to all ASM activities in high-risk regions that supply international markets. Connecting mineral supply chain actors to promote compliance with the Organisation for Economic Co-operation and Development (OECD) Due Diligence Guidance and alignment with evolving legislation remains integral to the EPRM.

This White Paper is organised into two main parts: Sections 2 and 3 provide a contextual foundation while sections 4, 5, and 6 present the EPRM's new strategic orientation. Section 2 offers a concise overview of the ASM sector that highlights its global relevance, diversity, and specific development challenges and opportunities. Section 3 examines key dynamics shaping the geopolitical and regulatory landscape and discusses that responsible is reliable when it concerns minerals production and sourcing from ASM. Section 4 defines the concepts of responsible production and responsible sourcing. Section 5 details the EPRM's new strategic orientation. Section 6 delves into the EPRM's new scope and the core considerations and principles underpinning the commitment to fostering reliable and responsible mineral supply chains through inclusive and knowledge-driven engagement with ASM.





**Artisanal and small-scale mining:
challenges and opportunities**



1. Artisanal and small-scale mining: challenges and opportunities

ASM refers to a diverse range of mining activities that employ basic tools for extraction and processing with a tendency toward high labour intensity¹. Although traditionally viewed as low-tech and informal, the sector is rapidly evolving – whether in terms of technology, capital, and production volumes or in terms of the surfaces and depths mined. ASM is not only global, voluminous, and diverse; it also presents significant opportunities for sustainable development. In many regions, ASM represents the largest source of nonfarm rural income. Despite its economic importance, ASM is often misunderstood and underrepresented in sustainable development debates and policies, with public perceptions tending to focus on its negative impacts.²

Global scale and impact

While labelled artisanal and small-scale, ASM is a large and global phenomenon when considered in terms of production volumes and the number of people involved.

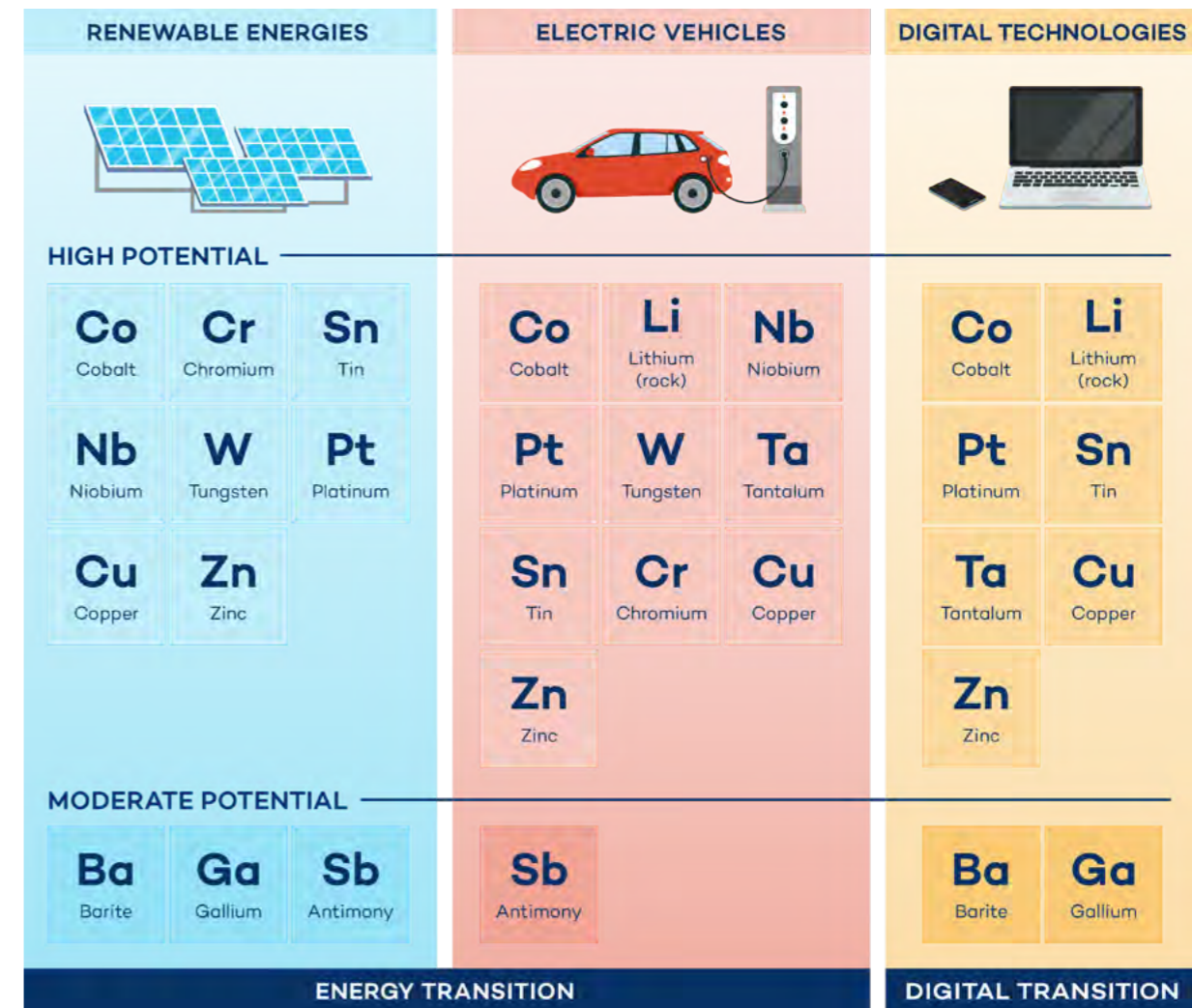
ASM contributes significantly to global mineral production. Approximately half of the global ASM workforce is engaged in gold mining, contributing around 20 per cent of the world's gold supply. The sector also accounts for an estimated 12 per cent of global cobalt production. ASM's share is even more substantial for other minerals, making up approximately 25 per cent of the global tin and tantalum supply. For gemstones, the contribution is roughly 80 per cent of sapphire and 20 per cent of diamond production.³ Additionally, ASM operations extract minerals such as tungsten, coal, lithium, rubies, tanzanite, and manganese, but reliable accumulative data is difficult to collect due to ASMs informal nature. Many critical minerals are already mined by ASM while ASM also has a high to moderate potential to expand production of certain critical minerals (see Figure 1).

With global material extraction expected to double or even quadruple over the next 40 years,⁴ which is in part driven by the twin low-carbon energy and digital transitions, ASM is poised to play an even more critical role due to its potential to expand the supply of critical minerals.⁵

The global ASM population has experienced significant growth over the past decades, including an estimated workforce of 44.7 million individuals. In 1993, estimates placed the global ASM workforce at around six million. By 1999, the International Labour Organization (ILO) had revised this figure to 13 million. More recent data indicate that the number of ASM operators grew to 30 million by 2014, and 40.7 million by 2017. Today, ASM directly employs approximately 44.7 million people across 80 countries, of whom about 30% are women and 70% are men (see Figure 2).



Figure 1 – Critical minerals, their associated technologies, and potential production from ASM.



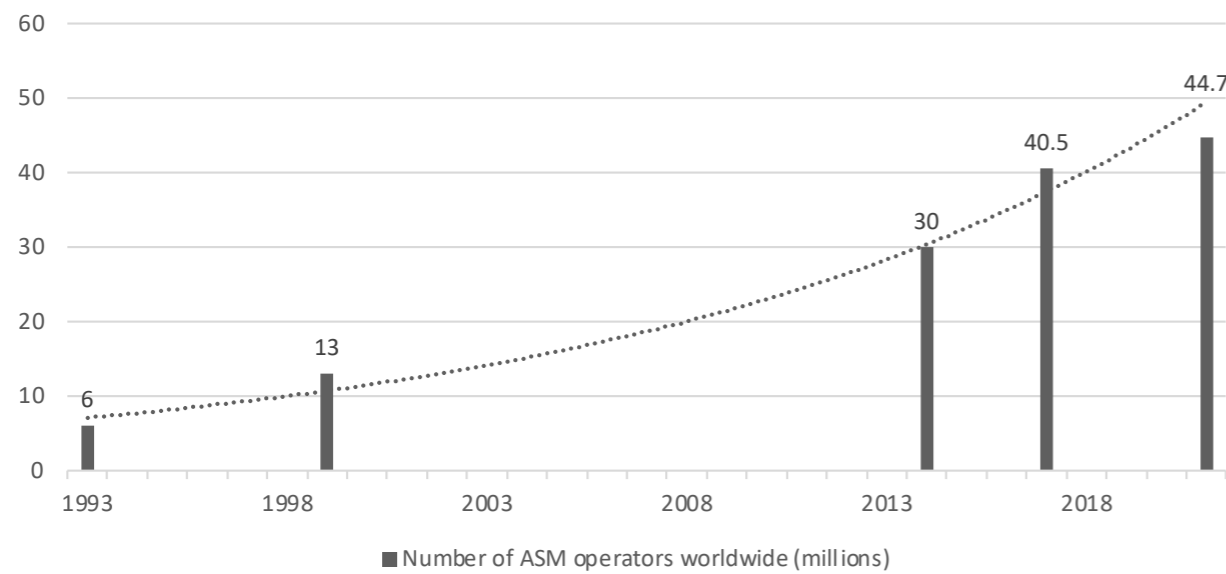
Source: IGF, 2024b.

Per region these numbers are divided as follows:

- South Asia: 15.9 million (36%)
- East Asia and Pacific: 13.9 million (31%)
- Sub-Saharan Africa: 13.2 million (29%)
- Latin America and the Caribbean: 1.7 million (4%)



Figure 2 - Estimated number of ASM operators worldwide (millions).



Source: Seccatore, Veiga, Origiasso, Marin, & De Tomi, 2014; IGF, 2017; World Bank, 2020.

An additional 180 million people depend on ASM through family connections and activities in downstream and service industries.⁶ This entails that up to roughly 2,74 per cent of the current world population depends on ASM for its livelihood. With high mineral prices often prompting a shift toward ASM, these figures may even be higher.

The global scale of ASM and its significant role in both mineral production and rural economies highlight its relevance for policymakers, supply chain actors, and civil society organisations.

As diverse as it is widespread

ASM operations are highly varied in their form, level of technological sophistication, and labour and capital intensity.

ASM targets a variety of different resources and deposits, ranging from alluvial to hard-rock. For the former, miners can operate in and along rivers using shovels and sieves, but also canoes and provisional diving equipment, or even mechanised dredging. However, ASM can equally target underground deposits through open-pit mining, shallow underground mining or even deep underground mining as new pumping technologies enable ASM to operate below the water level and target minerals located at greater depths.⁷ Operations can also use a mix of low-tech (manual tools) and more advanced equipment (ventilation systems, generators, gravity tables, and chemical processing agents).

ASM operations may be run by individuals or small teams, backed up by financiers or supporters and operating informally, but can also be larger, operating as formal companies or cooperatives and involving up to thousands of workers.⁸ Correspondingly, investment levels vary from low-capital to million dollar operations. In some cases, foreign nationals, notably from China, are active in ASM operations in producing countries by providing, for instance, technology and capital inputs.



Three overarching dimensions connect and cut across the global ASM sector:

1. **(In)formality:** While legal ASM operations exist (with formal concession titles), the majority of ASM operations take place informally. The space between informality and illegality is grey and nuanced, as informal operations often operate under the approval or even auspices of local governing authorities. Notwithstanding, this complicates monitoring and governance, and in combination with adverse social and environmental impacts may result in criminalisation.
2. **Socioeconomic embeddedness:** ASM is embedded in broader political and economic processes. It is not an isolated activity but one that shapes and is shaped by local identities (people do not just mine, they are miners) and broader societal inequalities. ASM both affects and is affected by other economic activities. ASM's land use and environmental impacts also intersect with agriculture, fishing, or cattle herding. Historical and operational ties to large-scale mining influence competition and resource allocation.⁹
3. **Dynamic nature:** ASM has a highly dynamic character, marked by the ability to quickly set up or draw down operations in response to political and market developments as well as by the swift uptake of new technologies. Despite its governance challenges, ASM can be responsive and adaptive to new demands, including the introduction of responsible production standards.

Recognising ASM's diversity is essential for developing sustainable interventions and policies, as the impacts, challenges, and opportunities vary significantly depending on the form and scale of operations as well as their embeddedness in local economies.

Challenges and Opportunities: Unlocking ASM's potential

The challenges and opportunities associated with ASM are as diverse as the forms it can assume, differing significantly from one context to another.

The main challenges to unlocking and further leveraging ASM's development potential include:

- **Environmental impacts:** ASM is typically linked to negative environmental impacts, ranging from the disturbance and toxic pollution of land and water bodies to negative health effects due to high-level dust production or the use of toxic substances. ASM operations account for the largest share of mercury consumption globally due to its role in gold processing. Cyanide is also increasingly appearing in gold processing activities.
- **Social and governance issues:** Inequalities in terms of gender relations and age, exclusion of specific groups, occurrences of child labour, or its association with various forms and scales of (violent) conflict are among the most commonly referred to negative social impacts of ASM. In fact, the role of minerals produced from ASM in fuelling violent conflicts was the main reason for the adoption of the EU RMR and the establishment of the EPRM. Due to its often informal nature, ASM operations can create a political economy characterised by smuggling and illicit financial flows. With expanding operations, there is also an increasing likelihood of conflictive interactions with large-scale mining operations or other economic activities.



- **Structural barriers:** The lack of financial resources, limited skills, geological knowledge and capacities, difficult access to land, the absence of legal status and formal government approval, uncertain social legitimacy, and criminalisation pose further challenges to developing and managing professional operations with minimal negative impacts.

ASM also offers significant opportunities to populations who often live in rural areas marked by high levels of poverty and few alternative viable livelihood opportunities. These opportunities include:

- **Economic empowerment:** ASM is the predominant source of nonfarm rural income in many parts of the world, supporting over 225 million people and offering social and economic opportunities in situations not only marked by high poverty levels but also by structurally recurring crises and uncertainty.¹⁰ With ASM providing well above any rural income alternative, miners often choose to redistribute their earnings into other livelihood activities, diversifying and facilitating rural income generating opportunities.¹¹ The potential of ASM to engender social and economic empowerment, not least to young people, also contributes towards enhanced resilience for conflict dynamics.
- **Capital injection into economies:** ASM injects substantial capital into local, regional and national economies. For example, studies indicate that in Kenya, ASM contributes approximately US\$1.9 million per year locally, US\$37 million at the district level, and US\$225 million nationally—with gold and gemstone mining generating nearly US\$500 million in foreign exchange.¹² Similarly, in the Central African Republic, Mongolia, and other countries, ASM plays a key role in stimulating local and national economies.¹³
- **Supply chain relevance:** For downstream companies, engaging with ASM is increasingly important. As global demand for minerals increases to meet the demands of the twin green and digital transitions, responsible ASM can contribute to reliable and responsible supply chains. Engaging with responsible ASM not only supports socio-economic development and environmental sustainability, but also helps to secure mineral supplies.

ASM is a diverse and complex phenomenon with context-specific challenges and opportunities that require tailored strategies from all stakeholders involved to ensure that it feeds into reliable and responsible mineral supply chains.





Responsible and reliable ASM
in a changing geopolitical and
regulatory landscape



2. Responsible and reliable ASM in a changing geopolitical and regulatory landscape

In light of the elevated due diligence risks, autonomous expansion, and significant contribution to the supply of minerals, ASM must play an important role in reliable and responsible mineral supply chains.

Mineral supply chains and geopolitics

Critical and other mineral supply chains have become politicised. The twin green and digital transitions, along with the needs of aerospace and defence industries, are driving an unprecedented demand for critical minerals. Increasing geopolitical economic fragmentation and competition drives major geopolitical actors to seek to reduce the material dependencies of their industries and achieve more resiliency and security of supply.¹⁴ This is especially apparent in concerns over Chinese entities controlling large segments of minerals supply chains as well as virtually the entire rare earth elements supply chains while aggressively investing in ownership stakes of upstream supply chain actors.¹⁵ Potential disruptions in mineral supply chains caused by catastrophes, such as the COVID pandemic and climate-change related destruction further incentivise the securitisation of critical mineral supply chains. The politicisation of mineral supply chains can also be observed in a return of the assertion of sovereignty over resources by producing countries. Producing countries are reasserting control over their resources, seeking to reshape historically unequal trade relations and promote local value addition along the value chain.¹⁶

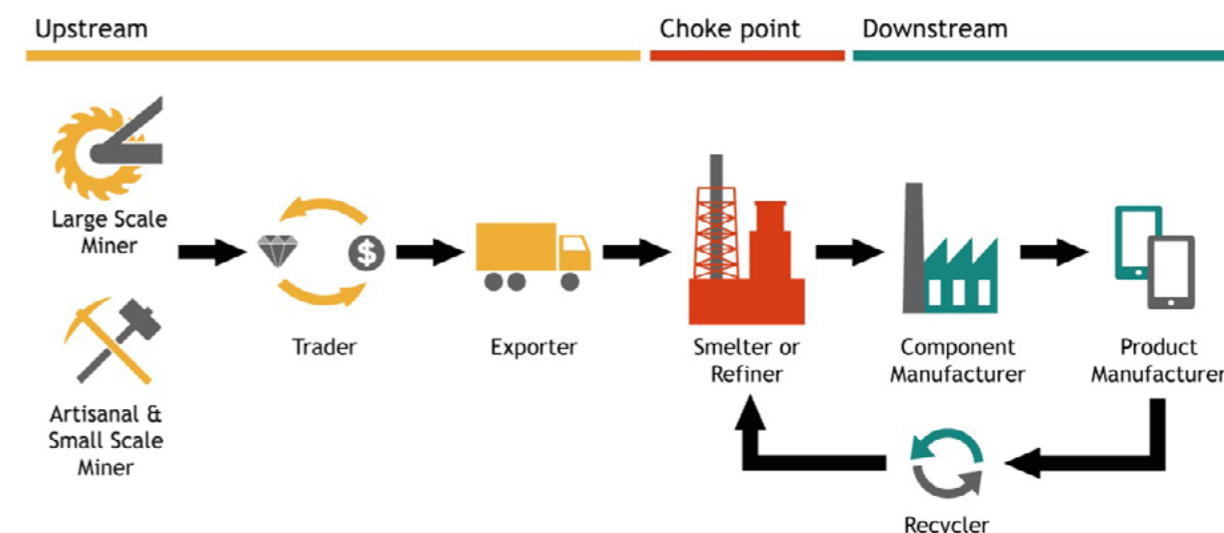
The EU's ambitions in this respect are accelerating the twin transitions and securing access to minerals, including through Raw Materials Diplomacy that seeks to reduce dependency on third countries, diversify supply, and promote responsible international sourcing, setting a model for integrating ASM into secure supply chains. As a result, the EU's regulatory and policy frameworks are adapting to facilitate these goals and promote resilience and responsible production in supply chains. The Critical Raw Materials Act¹⁷ promotes a Raw Materials Diplomacy that uses trade agreements to secure and diversify trade in critical minerals and expands the number of Strategic Partnerships on raw materials.¹⁸ Through a "Team Europe" approach, funds are being channelled into the Global Gateway, aligning partner demands with EU interests—most notably, securing access to responsibly produced minerals.¹⁹

Expanding due diligence obligations: responsible = reliable

Whereas early EU legislation on responsible mineral supply chains focussed on preventing the financing of armed conflict, recent years have seen more expansive due diligence obligations. The EU has adopted binding due diligence legislation that lays down obligations along the entire supply chains for many economic actors (Figure 4), including the EU Batteries Regulation in 2023,²⁰ the Corporate Sustainability Due Diligence Directive in 2024,²¹ and the Forced Labour Ban²² in 2025. Although not all of this legislation has come into force, European industries need time to set up due diligence practices in coordination with national governments and EU institutions.



Figure 4 – schematic overview of mineral supply chain.



Source: EPRM.

While often not included in considerations about supply security and due diligence, dismissing ASM as a contributor to critical minerals supply with due diligence possibilities is shortsighted. As detailed in section 2, ASM accounts for a significant share of global production for a selection of minerals. ASM is also much more flexible than other forms of mining in opening and scaling up mine sites thereby increasing production. With improved access to modern technologies, finance, and international markets, ASM's contribution could further expand—even into minerals like copper and lithium that are not yet major outputs of the sector.²³ In anticipation of projected increasing demand and prices, ASM operations are already moving into the production of critical minerals, as observed for small-scale lithium mining in Brazil and Zimbabwe.

The rapid expansion of ASM introduces due diligence risks. However, if these challenges are managed responsibly, ASM can drive employment, generate sustainable development, and strengthen community resilience. Responsible integration of ASM into global supply chains not only mitigates risks but also unlocks significant socio-economic opportunities.

The EPRM stresses that responsible is reliable when it concerns minerals production and sourcing from ASM. As the OECD Briefing Note Responsible is Reliable²⁴ discusses, ASM can support a more reliable and diversified supply by responding swiftly to demand pressures. But to ensure a reliable supply of minerals, companies and governments must engage with ASM in a coordinated and sustained fashion, especially in high-risk areas. Similarly, the IEA has highlighted that critical mineral supply chains cannot be truly secure, reliable and resilient unless they are also sustainable and responsible.²⁵ To prevent disruptions in ASM operations resulting from a lack of a social license to operate and to prevent aggravating situations of fragility and conflict necessitates responsible engagement.



Progressive due diligence engagement with ASM in high-risk regions can help unlock responsible and reliable supply chains that contribute to sustainable development, security of supply, and the resilience and livelihoods of ASM communities. Due to the ongoing expansion of ASM, its significant potential to contribute to the minerals supply, and elevated due diligence risks, it must play an important role in responsible and resilient mineral supply chains.

Towards scaled and multi-stakeholder partnerships

Over the past fifty years, donor interventions in ASM have struggled to yield sustained, positive outcomes towards reliable and responsible supply chains that contribute to sustainable development, security of supply, and the resilience of ASM communities. The World Bank has recently noted that the lack of results has culminated in “a crisis point” for donor interventions in the ASM space.²⁶ Since the turn of the millennium, due diligence and market compliance outlooks have become dominant frames of reference in ASM interventions. Accordingly, donors focused on mine-to-market, mining standards, mine certification, and mineral traceability projects. The EPRM was founded as a mine-to-market MSI in line with this outlook. Many of these interventions insufficiently established complementarity between the downstream and upstream interests and benefits of due diligence, hampering their effectiveness. In addition, the pilot-nature of many of these interventions inhibited catalysing sufficient resources to address structural barriers. To achieve sustained outcomes interventions must address structural barriers by replicating and scaling up positive initiatives. This was also noted in the most recent EPRM impact evaluation.²⁷

To achieve coordinated and sustained engagement with ASM governments, supply chain actors, and civil society organisations must embrace a new culture of scaled partnership through MSIs. The World Bank concludes that such an approach is needed to mobilise ASM’s positive potential to contribute to sustainable development and to regulate and legalise ASM. Beyond regulation and legalisation, ASM formalisation also encompasses responsible production practices and monitoring, financial inclusion, and linking with opportunities for commercialisation and local value addition. Within this new culture of scaled partnerships “multistakeholder partnerships will be critical” for leveraging and coordinating support sources and ensuring complementarity between upstream and downstream interests.²⁸

The UN Secretary-General’s Panel on Critical Energy Transition Minerals also signalled the need for initiatives that work with ASM practitioners to improve mining practices and recommended support for MSIs that empower “artisanal and small-scale miners to become agents of transformation to foster development, environmental stewardship and human rights.”²⁹

Elevated due diligence risks, coupled with its autonomous expansion and substantial production potential, make ASM indispensable for fostering reliable and responsible supply chains. For companies, governments, and civil society alike, engaging with ASM through coordinated, progressive due diligence and scaled MSIs is essential. This approach not only secures mineral supplies and enhances supply chain reliability but also promotes sustainable development and ensures complementarity between upstream and downstream interests.





Responsible ASM and
responsible sourcing



3. Responsible ASM and responsible sourcing

As the minerals landscape evolves, including the ASM sector, inclusive and knowledge-driven approaches become crucial for developing reliable and responsible mineral supply chains. The EPRM envisions a future of responsible mineral supply chains in which ASM operations are formally incorporated to the benefit of supply chain actors' access to reliable mineral supply chains, mining communities' wellbeing, and producing countries' development objectives. To achieve this vision, the EPRM must foster both responsible mining and sourcing of minerals.

Responsible ASM

Given the multifaceted challenges associated with ASM, the EPRM approaches responsible ASM from a holistic perspective that combines social, environmental and governance concerns. Responsible ASM respects and facilitates the interests of people and environment, striving to maximize benefits while minimizing negative impacts. This covers domains that include those listed in Table 1.

Responsible ASM is about continuous progressive improvement in mining practices because each mining environment is unique while challenges are multifaceted. Social, historical, political, and economic conditions determine the starting point for interventions. What is considered responsible in one setting may differ to another. This context-specific approach underpins the EPRM's commitment to progressive and continuous improvement with ASM operations evolving towards adherence with globally recognised standards, such as the CRAFT progressive performance standard for ASM operators.³⁰

Responsible ASM is a joint effort and requires long-term collaborative commitments. While ASM operations are fundamental to implementing responsible mining practices, the road towards responsible ASM must be a collaborative effort of all stakeholders in the ASM ecosystem. This includes ensuring a sound regulatory environment by local, national and international governing authorities. A formal, regulated, monitored and secure working environment can set the conditions for ASM operators to professionalise their operations and invest in responsible ASM. For supply chain actors sourcing minerals, engaging with responsible ASM means supporting operations that respect the interest of both the people and environment affected by these operations while progressively advancing social and environmental standards.

Among a broad range of products, services and activities, a major focus of the EPRM is to fund projects that promote responsible ASM practices in producing regions. Up to 2024, EPRM has funded 27 projects across 16 countries. These projects address challenges within the ASM space and promote responsible production and sourcing. EPRM projects reflect the domains of responsible ASM listed in Table 1, which includes a focus on improving working conditions, ensuring fair remuneration, advancing gender equality, protecting vulnerable and marginalised groups, reducing environmental harm, eliminating the use of toxic substances, supporting formalisation processes, increasing transparency through digital technologies, and addressing human rights violations and conflict financing as well as concrete actions that promote responsible sourcing.



Table 1 – Key domains of responsible ASM.

Domain	Example
Working conditions and production relations	Ensuring fair remuneration, safe working conditions (e.g., use of protective equipment) and bondage-free labour, as well as the elimination of child labour, and exclusion and inequalities based on, for example, ethnicity, gender, or age and seniority.
Conflict dimensions	Ensuring that ASM operations do not contribute directly or indirectly to conflict. Leveraging ASM's potential to enhance resilience towards conflict dynamics.
Access to resources	Facilitating access to technology, geological knowledge, and finance.
Community impacts and community-level legitimacy	Minimising environmental and social disruptions in nearby communities and their economic activities, securing local buy-in and a social license to operate that respects local norms and needs.
Environmental stewardship	Reducing environmental impacts before, during, and after mining operations, including mine-closure.
Gender equity	Ensuring that benefits and negative impacts are equally distributed and minimised across genders. Preventing exclusion based on gender.
Secure access to land	Operating on land with formal, secure, and legal tenure while respecting protected areas.
Regulatory compliance	Working towards legal operations with access to formal supply chains that comply with national and international laws and regulations. This includes transparency and accountability actions, as well as a sound and monitored regulatory environment.



Responsible sourcing

In order to foster responsible supply chains “companies must endeavour to source minerals from areas with higher risks profiles in a way that mitigates, not overlooks, these risks”.³¹ Such endeavours and associated investments would enable ASM operations to professionalise, increase productivity and decrease adverse effects. Moreover, they enable companies to address disruption and geopolitical risks in their supply chains by diversifying and improving the reliability of these supply chains.

The Re-Sourcing project – an EU-funded initiative – considers responsible sourcing as a combination of policies, processes, and compliance mechanisms that secure the rights of those impacted by minerals supply chains as prioritised by those stakeholders impacted and ensured by duty bearers.³² Rights, in this case, refer to social, economic, and environmental rights. Similarly, the OECD Guidance observes that risks of mineral exploitation contribute to conflict and human rights violations and can hinder social and economic development and provides step-by-step management recommendations endorsed by governments to overcome these risks and foster responsible supply chains of all minerals. The OECD Guidance thus assists companies with respecting human rights and avoiding contributing to conflict through their mineral or metal purchasing decisions and practices.

The EPRM approaches responsible sourcing from a holistic perspective that combines social, environmental and governance concerns. Responsible sourcing aims to maximize the benefits of mining while minimizing its negative impacts, ensuring that the process of turning raw materials into a consumer products aligns with global due diligence standards. It emphasizes a proactive commitment to engaging with and sourcing from responsible ASM. This covers domains of action that include those listed in Table 2.³³

Like responsible ASM, responsible sourcing from high-risk areas is a journey of progressive improvement. Through progressive and continuous improvement increasingly responsible mineral supply chains can be achieved even when the road ahead is lengthy and bumpy. As supply chain actors work toward full compliance with the OECD Guidance, the horizon remains the continuous enhancement of due diligence practices to foster more reliable and responsible mineral supply chains.

In high-risk areas, responsible sourcing demands that supply chain actors rigorously implement the OECD Guidance to ensure that their mineral sourcing decisions do not contribute to conflict or human rights abuses. Yet, responsible sourcing is not merely about compliance—it is a strategic approach that secures a reliable mineral supply while safeguarding human rights and the environment. By actively engaging in responsible sourcing practices, companies can mitigate risks, enhance supply chain resilience, and contribute to sustainable development.



Table 2 – Key domains of responsible sourcing.

Domain	Example
Industry-wide cooperation	Building capacity across the sector to conduct thorough due diligence.
Cost sharing	Demonstrating methods to share responsible sourcing and due diligence costs among upstream and downstream actors.
Collaborative initiatives	Participating in joint efforts on responsible supply chain management, ensuring coordination between supply chain actors that share suppliers.
Partnership building	Establishing partnerships with international bodies, civil society, and organisations that promote responsible sourcing practices.
Adherence to global standards	Integrating frameworks such as the OECD’s model supply chain policy and the UN Guiding Principles on Business and Human Rights.
Commitment to ASM engagement	Committing to actively source minerals from responsible ASM operations.



**EPRM's strategic orientation:
inclusive and knowledge-driven
engagement with ASM**



4. EPRM's strategic orientation: inclusive and knowledge-driven engagement with ASM

The EPRM's commitment to responsible mining and sourcing, and to fostering reliable mineral supply chains, is embedded in an ever changing, complex landscape (see sections 2 and 3). To remain effective, the EPRM continuously monitors regulatory, geopolitical, and market dynamics. In recent years, three major factors have driven EPRM to gradually shift its orientation from 3TG minerals in CAHRAs to a broader mineral and geographical scope:

1. **Evolving mineral landscape:** The twin green and digital transitions have significantly increased demand for minerals like copper, lithium, and cobalt, essential for technologies such as electric vehicles, wind turbines, and solar panels. While industrial mining often dominates the conversation, the significant role of ASM remains underappreciated and overlooked. The EPRM recognises the need to expand its mineral scope beyond 3TGs to reflect these demand shifts and highlight the role of ASM in the production of minerals needed for these transitions.
2. **Strategic evaluations:** Independent assessments of the EPRM by PWC and Levin Sources,³⁴ Projekt-Consult,³⁵ and ADE³⁶ have identified areas for strategic improvement. In response, the EPRM expanded its mineral scope in its 2023 Call for Proposals to include lithium, natural graphite, cobalt, copper, and nickel.
3. **Regulatory and geopolitical developments:** The EU's Raw Materials Diplomacy aims to reduce dependency on third countries whilst promoting responsible sourcing and production. Progressive due diligence in the ASM supply chain enhances reliability and supports sustainable development and community resilience. Coordinated multi-stakeholder partnerships are essential to achieve these goals.

A participatory process in the form of different member consultations and strategic dialogues, and a review of the ASM policy and academic literature has shaped the EPRM's strategic reorientation, addressing its mineral, thematic, and regional focus and unearthing 5 key considerations:

1. **Continued focus on ASM:** Insufficient donor support for ASM continues to reflect the marginalisation of ASM. This runs counter to its continued growth. Whether operating in the supply chain as a battery manufacturer, trader, smelter, or mining company, engaging and supporting ASM is a collective responsibility. The EPRM continues to bring together supply chain actors to collectively support the responsible production of ASM.
2. **Broader mineral scope:** The EPRM must expand beyond 3TGs to cover minerals like lithium, cobalt, and copper. This broadening strengthens the EPRM's ability to secure donor funding and remain relevant to its members. However, for many critical minerals, the contribution of ASM remains speculative due to its often informal and highly mobile nature. Also, the ASM workforce remains heavily concentrated in gold mining (±2.5 million people), a focus area that will persist due to its significance and steady growth driven by rising gold prices.
3. **Alignment with evolving legislation:** Expanding the mineral scope requires recalibrating the EPRM's relationship with the EU RMR, given its focus on 3TGs and CAHRAs. The EPRM balances alignment



with the EU RMR with alignment with the EU Batteries Regulation, the EU Critical Raw Materials Act, and the EU Corporate Sustainability and Due Diligence Directive.

4. **Flexible thematic and regional scope:** Minerals linked to the twin green and digital transitions may not always face the same challenges as 3TGs mined by ASM communities in CAHRAs. The EPRM adopts a more flexible thematic and geographic focus to reflect these variations. Rather than exclusively centring CAHRAs, the EPRM focuses on areas where human rights are at a significant risk.
5. **Connecting supply chain actors:** The EPRM's unique strength lies in connecting diverse stakeholders along mineral supply chains. This remains a core concern, adding value to members through knowledge building and exchange across projects and members.

A new strategic orientation

Bringing together the considerations outlined above leads to the following new strategic orientation of EPRM:

1. **Shift towards a broader approach to responsible ASM and responsible sourcing practices in alignment with OECD Due Diligence Guidance:** The EPRM remains an accompanying measure to the EU RMR and continues its efforts to make communities more resilient to conflict dynamics, but foregrounds the wider domain of responsible mining and promotes compliance with the OECD Due Diligence Guidance. This shift enables the EPRM to align with and remain relevant to other legislation and guidelines addressing human rights risks in mineral supply chains. In essence, the EPRM connects to all these legislative frameworks through its core focus on responsible ASM and responsible sourcing. Integral to EPRM remains a focus on connecting mineral supply chain actors to foster compliance with the OECD Guidance and support alignment with evolving legislation.
2. **Expand the mineral and geographic scope to ASM activities supplying international markets:** This means that the EPRM no longer operates within the predetermined mineral and regional scopes dictated by the EU RMR and associated CAHRA list. Instead, the EPRM focusses on any minerals mined by ASM communities in areas where human rights are at risk. Due to its emphasis on international supply chains, ASM activities in high-risk areas that exclusively serve domestic markets, such as development minerals,³⁷ remain outside of the EPRM's scope.

The EPRM's new strategic orientation reflects a dynamic approach that introduces greater flexibility to the EPRM's work, which is essential for remaining a vital MSI for fostering responsible mineral supply chains, addressing the significant knowledge gaps in the ASM space, and adapting to the rapidly changing mineral, geopolitical, and regulatory landscape.

Implications for EPRM Projects

The financing of projects focused on responsible mining and sourcing is a critical component of the EPRM's work. In future Calls for Project Proposals, the EPRM adopts a flexible approach to the mineral, regional, and thematic focus, provided they align with the strategic orientation. Projects focused on ASM for domestic production or large-scale mining remain outside the scope of EPRM funding. Within this broadened scope, Calls for Proposals can target specific minerals, themes, or regions based on situated needs. The following table provides an illustrative overview of projects that could be considered in future Calls for Proposals:



Table 3 - Examples of potential future EPRM projects.
Additional considerations.

Likelihood	Example	Explanation
Likely	Artisanal mica mining in Madagascar	A high risk of human rights violations and mica is produced for international markets.
	Small-scale gold mining in Colombia	A high risk of human rights violations and gold enters international supply chains.
	Artisanal lithium mining in Zimbabwe	A high risk of human rights violations and lithium is produced for international markets.
	Gemstone mining in Myanmar	A high risk of human rights violations and gemstones are produced for international markets.
Unlikely	Small-scale gold mining in Canada	A less significant risk of human rights violations.
	Industrial lithium mining in Chile	Industrial mining operations fall outside of the EPRM's scope.
	Artisanal stone aggregates in India	Stone is produced for domestic markets and not for international markets.
	Communities impacted by cobalt mining activities in the DRC	Project not explicitly focused on responsible production and/or sourcing are unlikely to be considered.



In addition to this refined mineral and geographical scope outlined earlier in this section, several additional focus areas enhance EPRM's strategic position.

Leverage the EPRM's unique role as an MSI: The EPRM's distinctive position as MSI enables it to convene international institutions, governments, supply chain actors, and civil society. The EPRM strengthens its role as centre of expertise and convener of dialogues at local, national, and international levels. The EPRM takes strategic positions to advance responsible ASM and responsible sourcing.

- 1. Adopt an ASM-centred approach:** The EPRM connects with on-the-ground realities by inclusively addressing ASM needs. This involves aligning international market objectives with domestic actors to professionalise their activities and share costs. The EPRM fosters partnerships with local cooperatives and ASM communities, leveraging their networks and expertise to effectively address community needs. Participatory approaches ensure long-term sustainability and emphasise opportunities in the ASM sector rather than risks.
- 2. Enhance research and knowledge sharing:** The EPRM should invest in research to deepen understanding of the challenges faced by upstream actors, including ASM operators and project implementers. Strengthened knowledge-building and exchange among EPRM members and its broader network amplifies collective impact. Additionally, the EPRM makes better use of data and insights from its projects and membership base to inform strategy.
- 3. Strengthen political support:** Closer collaboration with governmental bodies and stakeholders in producing countries is essential to advocate for policy reforms and greater political backing for ASM formalisation. This increases the potential for projects to be sustainable and scalable.
- 4. Stress replicability and scalability:** The EPRM proactively identifies opportunities to replicate and scale successful initiatives. Clear exit strategies and replication plans are integrated into project proposals or early implementation stages. Conditions for scalability, effective engagement methods, and financing mechanisms are also identified. This includes securing long-term funding commitments and leveraging partnerships to amplify impact.

Inclusive and knowledge-driven engagement with ASM

To implement the new strategic orientation, the EPRM's work is guided by three core principles: 1) inclusivity, 2) knowledge-driven and 3) engagement.

Inclusivity For the EPRM, inclusivity is a core value that guides its efforts to incorporate the diverse views and interests of all stakeholders. A multi-stakeholder and whole-of-supply-chain approach unites governments, supply chain actors, civil society organisations, and key institutional partners to each contribute unique expertise and insights to debates on responsible and reliable mineral supply chains. The EPRM brings together these actors from across the supply chain, whether in the case of organising seminars and conference panels, an EPRM members mission to a producing region, or through projects that incorporate multiple actors along the supply chain. A recent World Bank report recalls that "governments cannot go at it alone,"³⁸ emphasising the need for a broad support ecosystem that includes the private sector, civil society, miner associations, and research institutions. Creating a trusted space for open dialogue among these groups is fundamental to the EPRM's work.



Moreover, inclusivity means staying closely attuned to the concerns of upstream actors and stakeholders in producing regions and countries, taking a whole-of-supply chain approach. This can include collaboration with a diverse set of stakeholders, such as mining cooperatives, traders, exporters, refiners, and manufacturers. This can be done through projects, but also through membership and in communication and knowledge building activities. Furthermore, amplifying the voices of ASM operators in policy and industry forums, is crucial for highlighting that mining encompasses both large- and small-scale operations. This also helps raise awareness of the challenges and opportunities within the ASM sector.

The EPRM continues to contribute to reforming national mining policies to be more ASM-centred, just as it has already done in countries like Honduras, Mali, and Uganda. **The EPRM intensifies this commitment, extending it to more proactively engage stakeholders in the governance space of mineral-producing countries.** In line with the World Bank's newly articulated vision on sustainable ASM, the EPRM values the incorporation of actors based in producing countries, not least because regulated and formalised ASM is critical for investing in responsible operations.

Knowledge-driven

Notwithstanding the wealth of research on ASM, there remains a knowledge gap that the EPRM seeks to bridge. Robust data on ASM remains scarce due to the sector's informality. The assessment that 134-269 million people depend on ASM (figures spanning a range of 136 million) is illustrative of the degree of uncertainty in the available data. Efforts such as the World Bank's DELVE initiative, which aims to create a global bottom-up informed platform on ASM, are therefore much needed. By systematically analysing lessons learned from EPRM projects and enacting a commitment to creating an inclusive environment for dialogue, knowledge sharing and learning – among other things, the EPRM contributes to bridging the knowledge gap.

EPRM projects not only drive responsible mining and sourcing through tangible activities but also serve as valuable sources of information. The EPRM's diverse membership brings a wealth of expertise that the EPRM aggregates and shares through meetings, webinars, and events, reinforcing the EPRM's commitment to knowledge-driven decision-making and interventions.

An evidence-based, locally grounded, and knowledge-driven approach is essential to understanding the synergies and diversity of the ASM landscape and addressing its challenges and opportunities. As described above, while ASM has global implications, its operations are deeply influenced by local political, social, economic, and environmental conditions. These differences are critical to take into account as they result in different environmental and health impacts, forms of land usage, capital, labour and technology requirements, and opportunities as investment or political climates vary. By leveraging its multi-stakeholder character, network, and project-derived insights, the EPRM is committed to collaborating with key stakeholders to meet the knowledge demands in the ASM space.



Engagement

As legislation alone is not sufficient to enact change and foster responsible production and sourcing practices, the EPRM actively stimulates engagement with and involvement of ASM in sourcing practices. When challenges in ASM operations surface and human rights appear to be at risk in sourcing regions, supply chain actors may disengage from sourcing from ASM operations. Nonetheless, in such high-risk environments, minerals continue to be mined and still end up in international supply chains. The EPRM does not encourage supply chain actors to contribute to conflict financing but encourages engagement with ASM operations whenever possible in order to make local mining communities more resilient towards conflicts and less prone to conflict dynamics. The EPRM primarily stimulates engagement with ASM through the funding of scalable projects. These projects develop, test and provide exemplary tools and processes for responsible ASM and the incorporation of ASM-produced minerals in the sourcing practices of downstream supply chain actors.

Engagement implies being ASM-centred, basing efforts on the needs of all stakeholders.

This includes supply chain actors, who need to comply with due diligence requirements and shape their responsible sourcing practices as well as ASM actors themselves. The EPRM is committed to incorporating solutions to the challenges faced by different stakeholders in its work.

Ultimately, engagement means that the EPRM strives towards a situation where ASM is recognised as an important sector that it is formally incorporated in global mineral supply chains. In line with this view, EPRM members are committed to progressive learning and embarking on a trajectory to actively sourcing from ASM. After all, creating responsible mineral supply chains – i.e. supply chains that are built on practices and processes of responsible production and sourcing - is a collective responsibility. Negative impacts will continue to exist with disengagement. Engagement, on the other hand, enables ASM operations to professionalise and allows downstream supply chain actors to diversify and improve the reliability of their supply chains.



**Conclusion: collaborating towards
reliable supply chains through
responsible production and sourcing**



Conclusion: collaborating towards reliable supply chains through responsible production and sourcing

The responsible production and sourcing of minerals are essential to building reliable, resilient, and sustainable supply chains in an increasingly complex geopolitical and regulatory environment. As this White Paper has outlined, ASM is essential to global mineral supply and to the livelihoods of millions. However, its full potential can only be unlocked through responsible production, responsible sourcing, and a commitment to multi-stakeholder collaboration.

A changing landscape: the need for an inclusive and knowledge-driven approach

The mineral, geopolitical, and regulatory landscapes are undergoing rapid transformation.

With the accelerating twin green and digital transitions and associated increasing demand for critical minerals, ASM is playing an increasingly significant role in international mineral supply chains. However, ASM remains under-supported, often excluded from formal supply chains, and exposed to regulatory uncertainty.

In response, the EPRM has adapted its strategic orientation to facilitate responsible ASM and sourcing practices in high-risk areas that supply international markets. The EPRM emphasises a holistic, knowledge-driven, and inclusive approach to ensure that ASM communities can participate in responsible mineral supply chains while improving their working conditions, social protections, and access to international markets.

From compliance to commitment: responsible is reliable

As outlined in this White Paper, responsible sourcing is not just a compliance exercise but a strategic necessity since responsible is reliable. A responsible supply chain is one that is not only ethical but also resilient, secure, and sustainable. Supply chain actors must transition from a risk-avoidant mindset to an engagement-based approach, ensuring that due diligence efforts result in meaningful improvements for ASM communities rather than disengagement or exclusion. To achieve this, the EPRM's approach is guided by three core principles:

- **Inclusivity** – Bringing together governments, supply chain actors, civil society, and ASM communities to develop solutions that work for all stakeholders.
- **Knowledge-driven** – Investing in research, data collection, and shared learning to create informed and effective strategies.
- **Engagement** – Encouraging proactive collaboration with ASM operators to improve conditions on the ground and create mutually beneficial relationships along the supply chain.

By embedding these principles into its strategy, the EPRM fosters responsible production and sourcing practices that contribute to due diligence efforts, sustainable development objectives, mining communities' socio-economic development and supply chain actors' access to reliable mineral supply chains.



The way forward: a collective responsibility

Building reliable and responsible mineral supply chains is a shared responsibility. Governments, civil society organisations, and businesses all have a role to play in ensuring that ASM is formally integrated into global mineral supply chains. Strategic partnerships, innovative financing mechanisms, and policy alignment can accelerate the transition towards reliable and responsible mineral supply chains.

As a unique multi-stakeholder initiative, the EPRM remains committed to its role as a convener, catalyst, and knowledge hub—bridging the gap between downstream supply chain actors and upstream ASM communities. By strengthening due diligence frameworks, supporting scalable projects, and fostering deeper engagement across the supply chain, the EPRM continues to drive meaningful change.

The success of reliable and responsible mineral supply chains depends on action. By working together, stakeholders can create an ecosystem where responsible production and sourcing are not just aspirations, but a reality that benefits all actors—from ASM communities to global consumers. The EPRM invites its members and all other stakeholders to commit to this shared vision and take concrete steps towards a future where responsible production and sourcing are the foundation of reliable mineral supply chains.



Endnotes

1. World Bank 2024; see also Fisher et al 2021; and Hilson et al 2017.
2. World Bank 2024.
3. These percentages derive from WB 2024 and are conservative estimation.
4. OECD 2019; IIE 2022 [NEEDS TO BE INCLUDED IN REFERENCE LIST].
5. IGF 2024b.
6. World Bank 2020.
7. IGF 2024a & D'Angelo 2022.
8. Whether an operation this big still qualifies as ASM is often dependent on the surface such operations cover. In Ghana, for instance, a mining operation covering a plot of up to 25 acres counts as ASM. Underground, however, this operation may extend beyond its surface boundaries.
9. Verbrugge and Geenen 2019; Sauerwein 2020; Hilson, Sauerwein & Owen 2020; and African Minerals Development Centre 2024.
10. Pijpers and Luning. 2021.
11. See World Bank 2024, p. 19 for a comprehensive overview.
12. UKAid, Alliance for Responsible Mining and PACT 2018.
13. UKAid, Alliance for Responsible Mining and PACT 2018 & World Bank 2012.
14. SIPRI 2024.
15. AidData 2025.
16. UN Trade and Development 2023.
17. EU 2024c.
18. The EU has Strategic Partnerships with Argentina, Australia, Canada, Chile, the DRC, Greenland, Kazakhstan, Namibia, Norway, Rwanda, Serbia, Ukraine and Zambia.
19. European Commission and High Representative of The Union For Foreign Affairs And Security Policy 2024.
20. EU 2023.
21. EU 2024a.
22. EU 2024b.
23. IGF 2024a.
24. OECD 2023.
25. IEA 2023.
26. World Bank 2024, p. 45.
27. ADE 2024.
28. World Bank 2024, p. 35.
29. UN Secretary-General's Panel on Critical Energy Transition Minerals 2024, p. 20.
30. ARM 2024. The EPRM has contributed to its development through the financing of multiple projects focused on developing and testing the CRAFT-code.
31. OECD 2023.
32. [PLACEHOLDER REFERENCE RE-SOURCING PROJECT]
33. This list incorporates and expands on the actions proposed in OECD 2016: 15



34. PWC and Levin Sources 2020.
35. Projekt-Consult 2022.
36. ADE 2024.
37. 'Development Minerals' are minerals and materials that are mined, processed, manufactured and used domestically in industries such as construction, manufacturing, and agriculture.
See: <https://www.developmentminerals.org/index.php/en/>
38. World Bank 2024, p. 47.



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