Knowledge Package

Strategy development

This knowledge package was prepared by Ecorys on behalf of the World Bank, as part of the Coal Regions Learning Academy. The Coal Regions Learning Academy is a component of the Western Balkans and Ukraine Coal Regions in Transition Platform supported by the *World Bank*, the *College of Europe (Natolin campus)*, the *Energy Community Secretariat*, the *European Bank for Reconstruction and Development*, the *European Commission*, and the Government of Poland.

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Introduction

A carefully designed, locally tailored and practically implementable strategy is a fundamental requisite for a truly just transition. In this regard, regions and their respective authorities are particularly well placed to shape and drive transition, because they are acutely aware of local economic, social and environmental characteristics, as well as being familiar with the stakeholders most affected by transition.

This knowledge pack is relevant mainly to both Pillar 1 (Institutional Governance) and Pillar 2 (People and Communities) of the World Bank's 'Just Transition for All' three-by-three matrix. Furthermore, it is relevant to all three phases of support: Pre-closure Planning, Closure, and Regional Transition. There is necessarily a degree of overlap between this knowledge pack and others developed, including governance and institutions, stakeholder engagement and communication as well as workers and transition.

The context in which regional strategies are developed, as well as the specific objectives which they lay out, are highly diverse. Geographic, social, economic, technical, infrastructural, and institutional considerations all condition the particularities of the design and purpose of regional just transition strategies. Close attention to each of these considerations should be ensured.

Many broadly applicable and practically useful principles, processes, methodologies, tools and case study-derived lessons have been developed, by a range of organisations, which can serve to inspire and guide the development of regional just transition strategies. Just transition principles, such as sustainable economic diversification and place-based local approaches, have been elaborated. Step-by-step processes have been developed, which can support regional authorities looking to refine strategy roadmaps. Many such processes encompass the definition of problems, setting targets, identifying actions, and setting up monitoring and evaluation processes. Case studies of specific regions and their respective actions–such on the Canadian process of developing a task force on the coal transition–provide useful experience-based lessons.

Abstracts

Martin Ferry & Laura Polverari. 2017. "Regional Policy Intervention for Industrial Areas in Crisis." EoRPA Paper 17/6, prepared for the 38th meeting of the EoRPA Regional Policy Research Consortium at Ross Priory, Loch Lomondside, on 1-3 October 2017. Glasgow: European Policies Research Centre, University of Strathclyde.

Prepared in 2017 by the European Policies Research Centre, this paper examines a range of inter-related topics relevant to the development of transition strategies, including regional policy support for areas facing industrial decline, de-industrialisation, transition to new economic sectors and the closure of major employers.

By means of a case study exercise analysing regional policies in Finland, Germany, Italy, Norway and the UK, this paper reveals that there is considerable variation across countries in the ranking of priorities, the spatial focus of transition interventions, the combination of instruments utilised, and the approach to governance. Consequently, this paper provides several recommendations such as encouraging the pre-establishment of cooperation between regional actors, promoting integrated strategic approaches to deal with the diversity of territorial effects of the strategy, tailoring strategies to regional competence and the expertise of local actors, and ensuring continuous monitoring of the implementation of a strategy.

Key terms: Integrated strategic approach; job losses; strategy design; strategy formulation; economic transition; case studies

European Commission. 2018. Toolbox on smart specialisation–Horizon 2020 project online S3. Brussels.

A precondition for Member States and regions receiving support from EU Cohesion Policy (specifically the European Regional Development Fund) is to have developed a research and innovation strategy for smart specialisation (RIS3). RIS3s encourage Member States and regions to identify the activities, areas or technological domains which give them a comparative competitive advantage, and to leverage them for economic development.

In this context, the Online S3 project was launched in 2016 (funded by the EU's Horizon 2020 framework) and has since developed an e-policy platform, augmented with a toolbox of applications and online services, to assist national and regional authorities in the EU in elaborating their smart specialisation agenda. The Online S3 Platform hosts 28 tools covering the complete RIS3 process. Specifically, it identifies and explains the six iterative and distinctive

phases for the development of a RIS3 Strategy: governance, analysis of context, strategy formulation, priority setting, the policy mix, and monitoring and evaluation. The platform is a highly practical tool for transition regions.

Key terms: Strategy design; strategy formulation; strategic coherence; competitive advantage; R&I; strategy tools; economic transition; multi-level perspective

> *European Commission. 2020. Toolkit: Transition strategies–How to design effective strategies for coal regions in transition, by Timon Wehnert. Brussels.*

This toolkit was developed by the Initiative for Coal Regions in Transition (CRiT), a European Commission-funded support platform. It provides guidance and examples on the design of effective strategies for coal regions in transition; specifically on how to develop a transition strategy, how to identify actions and projects to support the strategy, and how to monitor, evaluate and continuously adapt the strategy. The toolkit is designed for the use of regional and local authorities, governmental agencies responsible for regional development, and civil society organisations.

This toolkit explains how the very existence of a strategy is fundamental to guide the various stakeholders and decision makers in transition processes and to align their actions with a coherent and effective approach. Specifically, it spells out the four steps of a policy cycle, which includes defining the problem, setting the target, identifying the action and finally ensuring a learning process. The toolkit provides a broad variety of examples, case studies and further reading lists to detail and elaborate its explanation of each of these four steps.

Key terms: Monitoring & evaluation; strategy design; strategy formulation; strategy tools; case studies; multi-level perspective

> *Zinecker, Anna, Philip Gass, Ivetta Gerasimchuk, Purva Jain, Tom Moerenhout, Yuliia Oharenko, Anissa R. Suharsono, and Christopher Beaton. 2020. Real People, Real Change: Strategies for just energy transitions. Winnipeg: International Institute for Sustainable Development.*

This report underlines the need to ensure consideration of the impact on affected people (i.e. workers, consumers, workers, consumers, businesses, communities, taxpayers) at the very core of energy transition strategies. Consequently, an aim of this report is to support governments of both developed and developing countries in their endeavour to make energy transitions just.

An extended conceptualisation and explanation of the evolution of the just transition is first

provided. The report then sets out a four-step process on how a just energy transition strategy ought to be developed. This involves developing an understanding of the context, identifying the champions/advocates of the energy transition, making an effective pitch to the relevant stakeholders, and ensuring complementarities with other policies, and thus strategic coherence in implementation. Finally, the report consolidates examples of political and communications strategies for a just transition, building on research and case studies of energy transitions that have happened or that are happening in Canada, Egypt, Indonesia, India, Poland and Ukraine. One exemplar is the Canadian case, in which a task force has been established for just transition in the coal power sector.

Key terms: strategic coherence, strategy design; impact assessment; social dialogue; strategy implementation; stakeholder engagement.

> *WWF European Policy Office. 2021. Toolkit for assessing effective Territorial Just Transition Plans. Brussels: WWF (World Wide Fund for Nature).*

This resource utilises principles for assessing just transition plans, consolidating them and transforming them into a toolkit for assessing transition plans and their capacity to deliver a truly just transition, in line with the Paris Agreement. It is aimed at policy makers, communities, civil society and other stakeholders involved in the development of such plans. It serves to provide guidance on what a good plan looks like, and how the quality of plans can be reviewed once developed.

The methodology presented is based on a set of indicators that test the performance of plans against 10 principles, key to the effectiveness of just transition plans. The principles include commitment to delivering on EU and UN objectives, phasing out fossil fuels, sustainable economic diversification, addressing social inequalities, meaningful partnerships engaging all stakeholders and place-based local approaches to the regional plans. The indicators have been utilised as part of a web tool that produces progress reports on the plans; thereby the application of the methodology results in a 'traffic light' rating for plans.

Key terms: monitoring & evaluation; strategy tools; impact assessment; strategy formulation; mapping scope

> *Brouwer, Herman, and Jan Brouwers. 2017. The MSP Tool Guide: Sixty tools to facilitate multi -stakeholder partnerships–Companion to The MSP Guide. Wageningen: Wageningen University and Research.*

This tool guide from 2017 is equipped with short abstracts of 60 methods which can be useful in designing regional transition strategies. It builds on a guidebook for multi-stakeholder partnerships, and many of the methods are oriented towards stakeholder engagement. However, various methods described can also be used as stand-alone activities in regional strategy development. Each method is described over 1-2 pages, which provides an easily accessible resource for strategy developers. Further reading suggestions are detailed at the end of each abstract.

Some of the tools are designed to help stakeholders to better comprehend transition issues, and to visualise a collaborative working environment. Others aim to develop stakeholders' mental models, to tap into 'creative and empathic reservoirs' to understand similarities and differences. Other tools deal with coordinating multi-stakeholder partnerships; managing group dynamics and addressing power issues, conflict and inclusion.

Key terms: strategy tools; stakeholder engagement; mapping impacts; social dialogue; strategic coherence; strategy design; strategy formulation

> *Viguri, Sofía, and Marco López. 2019. Designing for transformation: a practice-oriented toolkit for mainstreaming transformational change in program and project preparation processes. Washington, DC: Inter-American Development Bank.*

The assumption underlying this toolkit is that the challenges of climate change cannot be met through business-as-usual approaches with mere incremental improvements. Thus, 'Designing for transformation' specifies methods to design, prepare and/or select projects which make a substantial difference. This toolkit may be particularly helpful in the implementation of transition strategies–when a strategy is to be underpinned with suitable projects.

The toolkit contains twelve guiding sheets based on transformational change and a multi-level perspective, serving as analytical tools to help bring about and assess transformation. Furthermore, it provides eight case studies which exemplify approaches to transformational change. Transformational change is defined as strategic change in targeted markets and other systems with large-scale, sustainable impacts that accelerate or shift the trajectory toward low-carbon and climate-resilient development. The case studies focus on Asia and the Americas, examining public and private sector investment in climate resilience, clean technologies, renewable energy and sustainable ecosystems.

Key terms: strategy formulation; mapping scope; impact assessment; economic transition

World Benchmarking Alliance. 2021. Assessing a just transition: draft methodology. Amsterdam.

This report lays out social indicators assessing companies' contributions to a just transition. It does so with the aim of minimising the social impacts of transition strategies on workers, communities and the most vulnerable. While the methodology is geared towards businesses, it can equally be valuable for public authorities developing regional transition strategies. The report presents the draft just transition indicators, under public consultation until May 2021.

Six broad topics relating to the social dimension of just strategies are identified and assessed: planning for a just transition for workers and communities; social dialogue and stakeholder engagement; green and decent job creation; retaining and retraining/reskilling workers; social protection; and advocacy for policies and regulation supporting a just transition. Moreover, the methodology builds on over 100 reviewed sources as well as the 'Assessing low-Carbon Transition' (ACT) methodology and the Core Social Indicators. The methodology is geared towards businesses but can be equally helpful for public authorities developing regional transition strategies.

Key terms: monitoring & evaluation; mapping scope; impact assessment; strategy formulations; social dialogue; stakeholder engagement

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GLOSSARY

Brownfield redevelopment refers the process of site development – remediation, reclamation, rehabilitation and repurposing – to restore the physical, environmental, economic, and social/ community aspects of a brownfield site.

Carbon neutrality refers to a state in which the activities of an individual, an organisation, a city or a country result in net-zero CO_2 emissions. For a given set of activities to be carbon neutral, either the activities themselves must have zero CO_2 emissions, or the same amount of CO_2 released by the activities must be permanently sequestered (i.e. removed). Carbon sequestration can be achieved by making use of a so-called natural carbon sink, which are the natural ecosystems (e.g. forests, soil, oceans) which have the ability to absorb more carbon than they emit. To date, no artificial carbon sinks are able to remove carbon from the atmosphere on the necessary scale. Offsetting emissions made in one sector by reducing them somewhere else through investment in renewable energy or energy efficiency could contribute to carbon neutrality.

Civil society refers to the wide array of non-governmental and not for profit organizations that have a presence in public life, express the interests and values of their members and others, based on ethical, cultural, political, environmental, scientific, religious, or philanthropic considerations.

Clean energy technologies refer to any processes, products or services that reduce negative environmental impacts of energy production through emissions reduction, energy efficiency improvements and sustainable use of resources (use of renewable and clean sources of energy such as geothermal, hydropower, solar, wind, and sustainable biomass).

Coal phase-out is the cessation of coal extraction and related utilisation activities, as part of a broader fossil fuel phase-out and transition to carbon neutrality.

Decommissioning of infrastructure refers to the removal of redundant infrastructure (equipment, buildings, material) when a coal mine or a power generation facility has reached the end of its service life. The level of decommissioning work, together with site clean-up, will depend on potential future reuse options.

Energy transition refers to the (global) energy sector's shift from fossil-based systems of energy production and consumption — including oil, natural gas, and coal — to renewable energy sources like wind and solar. The need to reduce energy-related CO_2 emissions to limit climate change is at heart of energy transition. Adoption of renewable energy and energy efficiency

measures are needed to achieve the required carbon reductions.

Future proofing refers to processes for anticipating future developments and events and taking actions to prepare to minimise possible negative consequences and maximise possibilities to seize opportunities. In the context of energy transition, 'future proofing' often refers to making investments that are resilient towards the effects of climate change and/or aligned with and adaptable to expected trends and changes in energy production and consumption, including climate neutrality. Future proofing investments in emerging post-transition sectors provide, therefore, a safeguard for long term employment and productivity potential of the local or regional economy.

Governance model refers to the arrangement put in place by public authorities to deliver its coal transition strategy in a way that is effective within the broader prevailing governance context. Successful governance models rely on close cooperation among the various governance levels (local, regional, national) and the various actors (public, private, social) in the concerned coal region(s).

Inclusion, also known as social inclusion, is the process and outcome of improving the terms on which individuals and groups, who might otherwise be excluded or marginalized, take part in society. An inclusive approach to energy transition is one that recognises and addresses in a meaningful way the disproportionate effects of the transition on certain groups and individuals. It may also encompass an approach whereby transition is recognised as an opportunity to improve the well-being of those that are already excluded or marginalized.

Industrial reconversion refers to conversion of former industrial areas, including post mining areas, and related activities into alternate socio-economic uses. Regions with a historical legacy of mining and industrial heritage have an opportunity to use the industrial infrastructure as an asset for future economic activity (e.g., industrial zone, cultural centre, or business and technology park).

Just transition encapsulates the principle that the transition to a climate neutral economy should happen in a fair way, whereby the benefits and costs of transition are distributed equitably, and where those that stand to lose economically or socially from the transition are adequately supported to ensure that no one is left behind. Consequently, just transition focus on jobs and livelihoods, and on advancing social and economic justice. It also incorporates the principle that transition processes should be based on dialogue and cooperation between workers, employers, communities, and governments to draw-up and drive the concrete policies, plans, and investments to achieve transition.

Legacy infrastructure relates to physical structures, utilities and machinery that were previously used in the extraction, preparation and transportation of coal and which are no longer utilised due

to the cessation of mining activities. These can represent both assets and liabilities; their status being dependent on their condition, maintenance, investment, and future plans for a site or a locality.

Mine closure is the process undertaken when the operational stage of a mine is ending or has ended, and the final decommissioning and mine rehabilitation is due to commence or is underway.

Mine closure liability is the situation of being legally responsible for a mine closure, which usually falls on the mine operator who should prepare and execute a mine closure plan. Government may face a risk of having to assume the liability for mine closure if an operator fails to or is incapable of closing the mine in a responsible manner.

Mining communities are communities, towns, or larger urban areas where miners and/or former miners and their families live. Mining communities are usually created around a mine or a quarry and are often characterised by a mono-industrial economy (an economy dominated by a single industry or company). They also often have strong local identity and display a place attachment to their community – a cultural and emotional bond between person and place.

Mining heritage relates to heritage values of former mining places, such as specific cultural and social values and meanings. Upon closure, the mining industry often leaves behind a large number of tangible and intangible assets which are a reminder of the past importance of mining and which contribute to regional identity. Physical mining heritage, such as buildings, machinery and equipment, are often transformed into cultural attractions of historical value that attract visitors to the region.

Multi-level governance (MLG) refers to models for both the decision making and implementation of policies and strategies that rely on interactions between different levels of government (i.e., local-regional-national). Effective multi-level governance models can enhance cooperation across levels of government, enabling synergies among different actions that can improve implementation of transition strategies and better achieve national and sub-national policy goals. Multi-level governance enables synergies between the priorities, powers, functions and regulations of differing levels of government.

Participatory methods refer to ways for active involvement of 'the public' in decision-making processes. The public can be citizens, stakeholders in a particular project or policy, experts, and other concerned parties. Participatory methods are considered to be integral to achieving a just transition in coal regions, as they can empower affected communities, enhance transparency, accountability, and responsiveness, and improve public policies and services. There are various participatory methods, including focus groups, consensus building conferences, thematic workshops and social dialogue activities. These methods can form the basis for partnership-

based planning and co-creation of a transition strategy.

Perpetual obligations are ongoing actions, such as pumping of mine water, that need to be continued indefinitely after cessation of mining activities. Such obligations depend on the type of coal mine and on specific regulatory requirements.

Public-private partnerships (PPPs) are long-term contractual agreements between a government entity and a private party for the provision of a public asset or service, in which the private party bears significant risk and management responsibility. This may relate to infrastructure assets (such as bridges, roads) or social assets (such as hospitals, utilities) and their associated services.

Reclamation are actions performed during or after a mining operation to shape, stabilize, revegetate or otherwise treat the land in order to return it to a safe, stable condition consistent with the establishment of a productive post-mining use of the land and the safe abandonment of a facility in a manner which ensures the public safety, as well as the encouragement of techniques which minimize the adverse visual effects.

Regional mine closure planning applies a regional land use approach to mine closure that goes beyond site-specific plans and aligns site-specific rehabilitation and repurposing targets to regional land use needs and capacities within an overarching planning context. Such an approach should lead to more focussed and co-ordinated efforts, as rehabilitation can be aligned to wider considerations of land productivity, ecosystem functionality, urban and rural development, or renewable energy drivers.

Rehabilitation planning is planning for restoration of land on which mining has taken place to prepare it for its intended post-closure land uses, which may be to restore the landscape to its pre-mining land uses (environmental rehabilitation). Rehabilitation planning may include measures relating to physical mine closure, environmental reclamation and rehabilitation (including the removal of mine equipment), securing the stability of remaining dumps and impoundments, water management and surface stability at closed underground mines, and monitoring and managing any post closure environmental and human health impacts.

Remediation is an action of remedying something, i.e. reversing or stopping environmental damage. Often used in context of contaminated soils or water. Remediation may include activities carried out to clean up or mitigate contaminated land or water.

Renewable energy is energy that is produced by natural resources—such as sunlight, wind, rain, waves, tides, and geothermal heat—that are not depleted or are naturally replenished within a short time span (i.e., within a few years or on a 'human timescale'). Biomass (organic material from animal or plant matter) is also defined as a renewable energy source but for it to make an effective contribution to

reducing greenhouse gas emissions, it must be produced and managed in a sustainable way.

Repurposing refers to the beneficial reuse of a closed mining or other industrial operation, whether through value-added changes or reuse of the land (e.g., energy generation or residential use), reuse of infrastructure at its present location or at another site, or derivative business opportunities that create new economic activity.

Revitalisation refers to policies and processes implemented to return and sustain the economic, environmental and social dimensions/contribution of the former mining (or industrial) sites for the benefit of the local community. Conducting revitalisation is aimed at preserving the mining cultural heritage, while introducing new economic and social functions. Successful revitalisation can attract visitors and investors, increase attractiveness of the region and revitalise local communities.

Social dialogue refers to negotiations, consultations or simply exchange of information between, or among, representatives of government, employers, and workers, on issues of common interest typically relating to economic and social policy. It can exist as a tripartite process, with the government as an official party to the dialogue or it may consist of bipartite relations only between labour and management (or trade unions and employers' organisations), with or without indirect government involvement. Social dialogue processes can be informal or institutionalised, and often it is a combination of the two. It can take place at the national, regional or at enterprise level. It can be inter-professional, sectoral or a combination of these.

Social impacts refer to socio-economic and cultural aspects of mine closure. Some of the common social impacts of closure include changes to the affected community's economic structure (e.g., loss of employment and business opportunities) and dynamics (e.g., demographic changes, departure of employees). In the context of coal phase out, social impacts can also encompass gender dimension (e.g., gender-related economic and employment inequalities), health and well-being of miners.

Smart specialisation is an approach that combines industrial, educational and innovation policies to suggest that countries or regions identify and select a limited number of priority areas for knowledge-based investments, focusing on their strengths and comparative advantages. In the EU Member States, smart specialisation is a place-based innovation policy concept used to support regional prioritisation in innovative sectors, fields or technologies. Regions impacted by coal phase out are under pressure to identify and develop new areas of specialisation, and to support local economic actors to exploit latent economic specialisms and diversify their local and regional economies.

Stakeholder engagement refers to the to the process by which an organisation leading the

transition away from coal engages with and involves those who are concerned or affected by the decisions that are made. Stakeholder engagement goes together with partnership building, both of which allow stakeholders to pool their resources to solve common problems. Effective stakeholder engagement can enhance the quality of decisions and outcomes, strengthen public trust, and enhance broad acceptance. If implemented properly, stakeholder engagement fosters legitimacy, especially through improving transparency and inclusivity. The inclusion of a broad and diverse set of stakeholders, including citizens, is considered a key element to successful stakeholder engagement.

Stranded assets are now generally accepted to be those assets that at some time prior to the end of their economic life (as assumed at the investment decision point) are no longer able to earn an economic return (i.e. meet the company's internal rate of return), as a result of changes associated with the transition to a low-carbon economy (lower than anticipated demand / prices). Or, in simple terms, assets that turn out to be worth less than expected as a result of changes associated with the energy transition.

Structural change refers to a qualitative transformation and evolution of economic systems. It is represented by a change in the relative weight of significant components of the economy such as production, consumption, employment, and population, and is seen in a shift or change in the ways a market, industry or economy functions or operates. Structural change is often sparked by technological innovation, new economic developments, changes in resource availability, changes in supply and demand of resources, and changes in the political landscape. In coal regions, structural change is associated with a transition from a carbon-intensive economy, where coal-related activities play a major role in the local economy, to a carbon-neutral economy, which utilises clean technologies and processes.

Welfare support is a government intervention intended to ensure that members of a society can meet their basic needs. Welfare support is usually part of an integrated portfolio of interventions that constitute the broader social protection (social security) system. In the context of a coal phase out, welfare support measures will be typically needed for workers that have lost or are about to lose their jobs. Welfare support can come in various forms, including income replacement benefits, early retirement options, or assistance in seeking alternative employment.


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