Fair Cobalt Alliance
L'Alliance du Cobalt Equitable

THE IMPACT FACILITY

ANNUAL SURVEY REPORT

MONITORING AND EVALUATION • FAIR COBALT ALLIANCE | FINDINGS FROM THE 2023 & 2024 PERCEPTION SURVEYS AT KAMILOMBE MINE

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FOREWORD

GROUNDBREAKING INSIGHTS
CHARTING THE LANDSCAPE OF ARTISANAL COBALT MINING

The Fair Cobalt Alliance (FCA) is committed to building a collaborative and responsible cobalt supply chain that delivers positive, lasting benefits to mining communities in the Democratic Republic of the Congo (DR Congo) and aligns with the world's transition to cleaner energy. This report, as the first of its kind published by the FCA, marks an important milestone in our journey to provide data-driven insights and a holistic understanding of the artisanal cobalt sector.

About this Report
This report is designed to offer our stakeholders a transparent, holistic analysis of the Artisanal and Small-Scale Mining (ASM) cobalt landscape, particularly at the Kamilombe Mine in Kolwezi. As part of FCA's commitment to ethical, transparent supply chains, this publication delivers key findings, trends, and challenges drawn from data collected in 2023 and 2024. This data provides a vital baseline to understand both the current realities of the sector and the progress achieved over a year of close observation and engagement with the community. Our intention is that this report serves not only as an analytical resource but also as a practical tool to help guide informed decisions, responsive actions, and supportive policies from all stakeholders invested in the sector.

Ensuring an Evidence-Based Approach
Central to our approach is the belief that only by capturing accurate and comprehensive data can we prioritise interventions that drive meaningful improvements in miners' lives. Aligned with our MEL framework, the FCA's team conducted two extensive perception surveys, engaging underground workers, washers, and community stakeholders to explore and understand conditions across a range of areas, including health, safety, income, household stability, child labour awareness, and market processes.

The survey methodology employed ensures the collection of statistically robust and representative data, which is essential for long-term impact assessment. The findings from this report will not only help the FCA track progress over time but will also be key in shaping our future interventions. By identifying key areas for improvement, such as income stability, financial inclusion, and market access, we can tailor our programmes to address the most pressing challenges faced by miners. This evidence-based approach will allow the FCA to remain responsive to the evolving needs on the ground, ensuring that our efforts maximise positive impact for the artisanal cobalt mining sector.
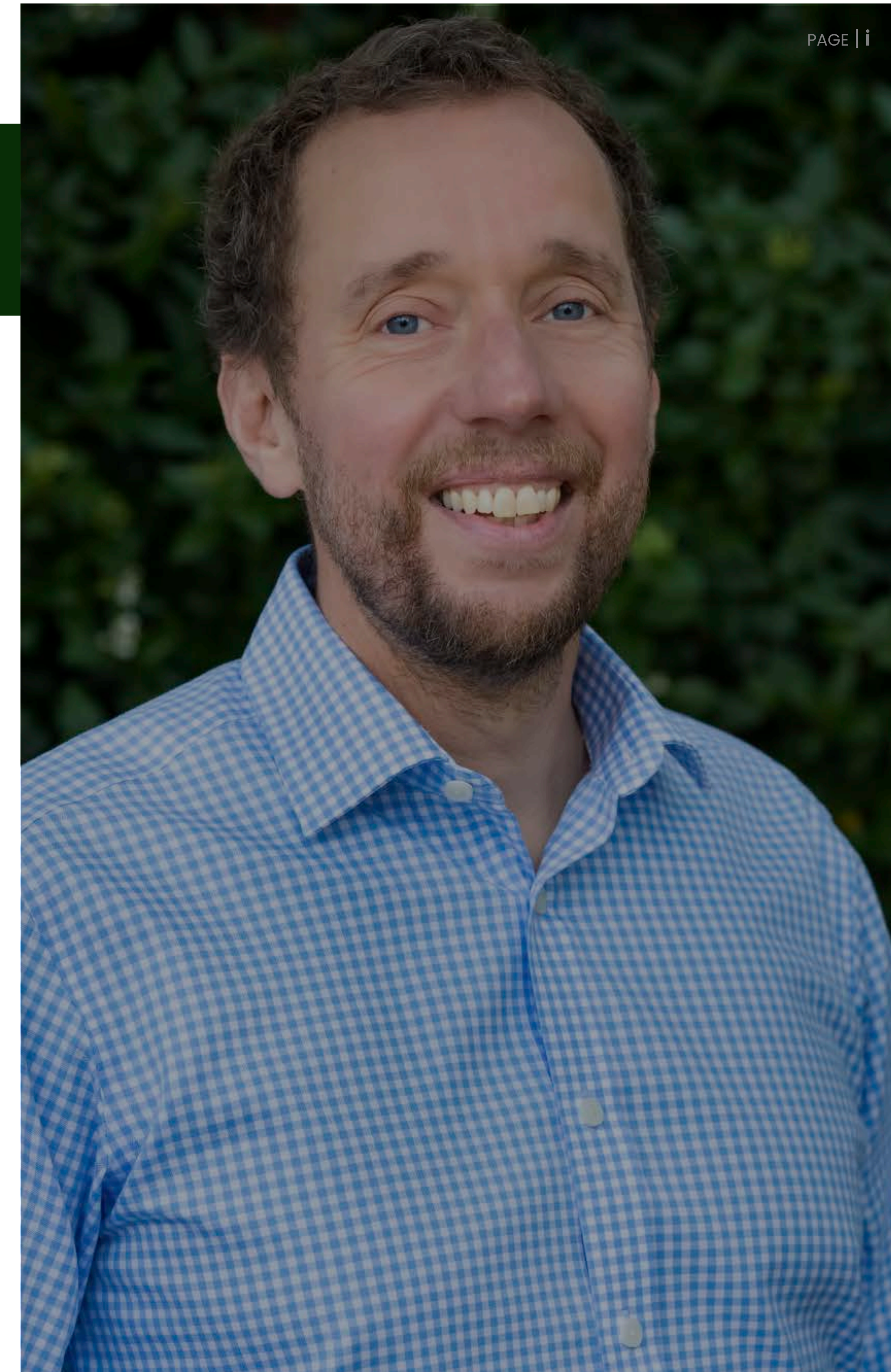
Insights and Challenges
In examining both survey cycles, this report highlights both achievements and ongoing challenges. Among the positive developments, we see enhanced safety measures, increased income stability, and growing awareness of child labour issues. However, the data also reflect significant challenges—especially in income variability, financial inclusion, and hygiene. Global market dynamics and fluctuating cobalt prices directly impact miners' livelihoods, underscoring the need for an adaptive approach that considers the volatility of their earnings and the broader market.

Commitment and Call to Action
While the FCA operates with limited resources, our dedication to supporting the welfare and agency of artisanal miners remains steadfast. Our mission, to enable artisanal cobalt mining communities in the DR Congo to thrive as responsible participants in the global energy transition, guides us daily.

We invite all stakeholders to consider these findings thoughtfully and to join us in our ongoing work to ensure that artisanal cobalt mining can be a legitimate, sustainable source of economic development for communities in the DR Congo.

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HOLGER GRUNDEL
Chair of the FCA's Advisory Board
& Managing Director at Levin Sources

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Want to explore our resources?
The Questionnaires and Datasets from these surveys can be found on our website, under **Measuring Our Impact**

THIS IS AN INTERNALLY PRODUCED REPORT AND ANALYSIS OF THE FAIR COBALT ALLIANCE.
It has not been externally reviewed or validated. The data presented herein derives from a dataset produced by two independent consultants, contracted by The Impact Facility. Questionnaires and queries were drafted and set by The Impact Facility. The dataset can be found on our website under 'measuring our impact'. Potential limitations related to the data analysis presented are accounted for wherever relevant.

THE IMPACT FACILITY
Author: Gustav Dahlqvist (TIF), November 2024

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🌐 https://www.theimpactfacility.com/
https://www.faircobaltalliance.org/
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GLOSSARY & ACRONYMS

GLOSSARY

Population	The entire group that is the subject of a statistical study.
Sample	A subset of a population selected for analysis.
Quantitative Data	Numerical information that can be measured and analysed statistically.
Monitoring & Evaluation (M&E)	A systematic process to assess the performance of a project, program, or policy, to improve effectiveness and inform decisions.
Percentage Increase/Decrease*	A measure of the difference between two values, expressed as a percentage of the initial value.
Coefficient Variation**	A measure of how much a set of numbers differ from the mean, expressed as a percentage.
Mean	The average of a set of numbers, calculated by dividing the sum of all values by the number of values.
Median	The middle value in a set of numbers, which separates the higher half from the lower half.

*Percentage Increase/Decrease
Percentage increase or decrease shows how much a quantity has grown or shrunk relative to its starting point. It compares the change between two values and expresses it as a percentage of the initial value. Common in fields like economics and finance, it provides a clear metric for growth or reduction over time.

Example: If a sample grows from 1% to 2%, the percentage increase is 100%, meaning the proportion has doubled.

**Relative Percentage (Coefficient of Variation)
Relative percentage variance compares a percentage change to its original value, focusing on the proportional difference between percentages. It's useful for comparing outcomes based on percentage scales, particularly when adjusting for different sample sizes.

Example: If a sample increases from 1% to 2%, the relative percentage variance is 1%, representing an additional 1% increase.

ACRONYMS

ASM	Artisanal and Small-Scale Mining
CDF	Congolese Franc
CMDS	Coopérative Minière pour le Développement Social
CV	Coefficient Variation (see glossary)
DRC	The Democratic Republic of Congo
FCA	Fair Cobalt Alliance
MEL	Monitoring, Evaluation and Learning
M&E	Monitoring & Evaluation
MoE	Margin of Error
OHS	Occupational Health & Safety
PE	Mining Permit
PME	Project Monitoring and Evaluation
PPE	Personal Protective Equipment
TIF	The Impact Facility
USD	United States Dollar
UK	United Kingdom
%	Percentage

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EXECUTIVE SUMMARY

A CLOSER LOOK

UNDERSTANDING THE REALITIES OF KAMILOMBE MINE

The DR. Congo accounts for about two-thirds of the world's cobalt, with artisanal and small-scale mining (ASM) contributing about 5-10 percent of that production. The Fair Cobalt Alliance (FCA) aims to improve conditions within this sector, and for the 150-250,000 that works within it. This report both highlights key insights about perceptions and challenges relevant to the FCA's work — and serves to reveal key trends and data about the sector more generally.

Through its Monitoring, Evaluation, and Learning (MEL) framework, the FCA seeks to ensure impact monitoring to be consistent, and representable for the wider workforce and adjacent community of the Kamilombe Mine in Kolwezi, the mine site with which the FCA is currently partnered with. As such, the surveys cover key areas such as population demographics, professional experience, safety, child labour, mineral marketing processes, stakeholder perceptions, and household goods and income.

This report presents the analysis and findings from two comprehensive surveys conducted by the FCA at Kamilombe Mine, an artisanal copper-cobalt site in Kolwezi, DR Congo. The first survey, conducted in 2023, serves as a baseline study, while the second survey, conducted in 2024, is the FCA's first follow-up study.

The purpose of these surveys is to provide insights into the socio-economic and operational conditions at the mine site, and assess changes over the one-year period.

The findings from the 2023 Baseline Survey and the 2024 Follow-Up Survey reveal improvements in several areas, including safety perceptions, income stability, and awareness of child labour issues. However, significant challenges remain, such as in income variability, financial inclusion. The data underscore the need for continued efforts to enhance the well-being of miners, improve operational practices, and foster fair and transparent market processes. Supporting local cooperatives and addressing economic concerns through better purchase prices and improved working conditions are critical for sustainable progress in the artisanal cobalt mining sector.

2 PERCEPTION SURVEYS HELD

Rolled out by independent consultants, two surveys has been held so far at Kamilombe

500+ MINERS INTERVIEWED

Between 2023 and 2024, the FCA surveyed a statistically significant sample of miners at Kamilombe

OF WHICH **220+** WERE WOMEN

The 2024 study contained an extended sample of the washer group, which is female dominated*

3 SAMPLE GROUPS SURVEYED

To understand nuances across key actors at the mine, underground workers, washers and community members were interviewed

450+ DATA POINTS

Spread across 80+ unique queries in three questionnaires, tailored to each sample group

6 THEMATIC CATEGORIES

A total of 6 thematic categories were included, to survey key aspects of the mining landscape at Kamilombe

*in 2023, the washer population at Kamilombe was small low to reflect the same sample size as diggers. Read more on page 11.

KEY FINDINGS

DEMOGRAPHICS AND PROFESSIONAL EXPERIENCE

A NECESSARY LIVELIHOOD

The Kamilombe mine in Kolwezi, DR Congo, and the nearby community of Kapata reveal a complex socio-economic landscape shaped by the artisanal cobalt mining sector. Key findings from an analysis of underground workers, washers, and community members highlight demographic composition, educational levels, geographic mobility, and employment trends. This community is deeply reliant on the cobalt sector, driven by economic necessity and limited alternatives. The findings underscore the need for sustainable employment, and educational support improve socio-economic conditions in the region.

Demographic composition and workforce maturity

The workforce and community are largely mature, with median ages ranging from 33 to 35 years. Underground workers (exclusively male) and washers (exclusively female) share similar age profiles, while community members (50/50 male and female) span a broader age range (18-80 years), indicating an established workforce.

Educational attainment and occupational roles

Educational backgrounds vary significantly across groups. Sixty percent of underground workers have completed secondary education, while 63% of washers have only primary education, reflecting gender disparities in education. Among community members, 40% completed secondary school, with a notable 33.6% holding high school diplomas.

Geographic mobility and migration

High geographic mobility characterises the workforce. Most underground workers come from Kolwezi or Greater Katanga,

while 42% of washers originate from other provinces. Employment and housing needs drive relocation, illustrating the economic pull of the mining industry.

Employment patterns and economic drivers

The community's dependence on the mining sector is evident, with 15% of underground workers relocating specifically for mine work. Washers, involved in mineral washing, often have family members also employed in mining roles, reinforcing an economic reliance on the sector. The most common motivations for entering mining include financial necessity and the lack of alternative employment, especially among washers, where 82.83% cite financial reasons as the primary driver.

Professional experience and economic background

The workforce demonstrates varied professional backgrounds, with underground workers often transitioning from roles as students, merchants, or small business owners, and washers coming predominantly from small businesses or domestic work. Employment durations reveal a substantial commitment to the sector, with a median tenure of six years for underground workers and five years for washers.

Socio-economic conditions

Household responsibilities are substantial, with underground workers supporting an average of 5.78 dependents and washers supporting 7.47, reflecting significant family obligations. Despite socio-economic challenges, school enrolment among children remains high, with over 90% enrolment rates across groups, highlighting community prioritisation of education.

**DEMOGRAPHICS
& PROFESSIONAL EXPERIENCE**

KEY FINDINGS

OCCUPATIONAL HEALTH, SAFETY AND HYGIENE
MANAGING THE HAZARDS OF ASM

The health and safety conditions at Kamilombe mine reveal both progress and ongoing challenges, shaped by efforts to improve worker welfare and operational standards. Developments in safety perception, risk awareness, accident reporting, and structural integrity highlight an evolving work environment, while increased personal protective equipment (PPE) usage and hygiene measures reflect a commitment to safer conditions. However, persistent issues with sanitation and structural stability underscore the need for ongoing attention and targeted interventions to ensure a secure, sustainable workplace.

Safety Perception and Risk Awareness
While the overall perception of safety among Kamilombe mine workers has improved, with 72% of underground workers feeling safe in 2024 (up from 69.79% in 2023), it remains an inherently hazardous work environment. All washers reported feeling safe consistently over the past two years, highlighting a strong sense of security within this group. Nevertheless, underground workers' awareness of specific risks has grown, reflecting the reality of mining's inherent dangers. Notable shifts include increased concerns over personal falls and flooding, with perceived flooding risk nearly doubling from 18.75% in 2023 to 40.00% in 2024.

Accidents and Structural Concerns
Witnessed accidents, mainly landslides and falls, remained consistent, though falling rock incidents decreased, reflecting some success in safety measures. 84% have witnessed at least one accident at work.

Confidence in mine shaft wall integrity declined, with only 71% of workers believing walls were solid, down from 83.33% in 2023. These findings emphasise the need for regular structural maintenance.

Personal Protective Equipment (PPE) Usage
PPE usage saw notable improvement, with 58.59% of miners reporting consistent PPE use in 2024, up from 38.30% in 2023. For washers, boot ownership increased through the "rent and buy" program, resulting in higher satisfaction and daily usage.

Hygiene and Site Cleanliness
Site cleanliness improved significantly for underground workers, with 55% rating the site as clean in 2024, compared to 28.13% in 2023. Toilet facilities, however, remain a major concern, with 88% of underground workers and 80.81% of washers reporting issues. Proposed solutions include adding and maintaining toilets and raising hygiene awareness.

Health Outcomes
While improvements in safety measures, PPE use, and site cleanliness have enhanced the work environment, challenges persist with structural integrity, flooding, and sanitation facilities. Ongoing monitoring, adaptive safety strategies, and infrastructure improvements are essential to ensure the continued well-being of Kamilombe mine workers.

**OCCUPATIONAL
HEALTH, SAFETY, AND HYGIENE**

KEY FINDINGS

CHILD LABOUR
UNDERSTANDING PERCEPTIONS OF CHILD LABOR CAUSES AND IMPACTS

The sampled data reflects a nuanced understanding of child labour, shaped by economic pressures, cultural factors, and safety concerns. This summary highlights key findings from an analysis of reasons against child labour, prevalence, and community-driven actions, underscoring both progress and remaining challenges in addressing child labour within this artisanal mining landscape.

Reasons against child labour
Across the Kamilombe mine community, members consistently prioritise the need for education and the risks associated with mine work as the main reasons to prevent child labour. In 2024, 37% of respondents emphasised that children should focus on their studies, while 25% cited the danger to children's safety and well-being in the mining environment. Additionally, concerns over delinquency have grown, reflecting an increased awareness of the broader social consequences of child labour.

Extent and perception of child labour
In 2024, the majority of site workers (89%) stated that child labour does not occur within their immediate community, with 10% describing it as rare and only 1% considering it common. This suggests either effective regulation or limited visibility of child labour practices. However, broader community awareness of children working at mine sites (no specific site referenced) has risen from 41.05% in 2023 to 45.45% in 2024, highlighting an increasing recognition of child labour as a pressing issue, even if not directly observed.

Factors driving child labour
Economic hardship remains the dominant driver of child labour, with 46% of respondents in 2024 identifying financial need as the primary cause. A lack of educational opportunities, cited by 33%, further compounds the issue, as children are left with few alternatives for personal and economic development. Other contributing factors, such as limited recreational options (11%) and family tradition (1%), reflect both immediate needs and deep-rooted social factors that necessitate targeted community and policy interventions.

Community actions and government efforts
The community has adopted various proactive measures to protect children from the risks of mining. Advising children to stay in school and raising awareness of mine-related dangers are common approaches, particularly among washer women, who often intervene directly by sending children away from mining sites. Perceptions of government efforts to curb child labour remain similar; local initiatives are generally seen in a positive light, broader government actions are often viewed as effective.

Combined insights
The combined insights reflect a deepening awareness of both the risks and drivers of child labour. While visible child labour may be declining within individual households, economic pressures and limited access to education remain persistent challenges. The need for effective government enforcement, community-led initiatives, and continued educational efforts is critical to safeguard children's health, safety, and future opportunities in the region.

CHILD LABOUR

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KEY FINDINGS

MINERAL MARKETING PROCESS
NAVIGATING DISCREPANCIES AND GRIEVANCES IN COBALT TRADE

The mineral marketing process at Kamilombe mine, centred on the cobalt trade, reveals evolving perceptions and persistent challenges among underground workers. Findings from the 2023 and 2024 surveys offer insights into workers' confidence in ore grade measurement, the seriousness of measurement discrepancies, preferred solutions, and economic needs, shedding light on the community's relationship with traders and perceptions of fairness within the trade.

Confidence in ore grade measurement
While confidence in the accuracy of ore grade measurements by traders has improved, a significant trust gap remains. In 2023, only 9.78% of workers believed the measurements were correct; this figure rose to 20.62% in 2024, reflecting a positive shift. However, 79.38% still doubted measurement accuracy, indicating that efforts to address transparency and fairness must continue. Although fewer workers considered measurement discrepancies a "Grand" issue in 2024 (71.25%, down from 82.42% in 2023), it remains a major concern. The growing percentage of respondents who view the issue as moderate or small suggests slight improvements or adaptation to these discrepancies, though accuracy concerns persist.

Evolving solutions and shifting preferences
The preferred approaches to resolving measurement issues have shifted from government intervention to more local and technological solutions. In 2023, over half of the workers advocated for government involvement, while in 2024, 42.73% preferred cooperative involvement, and support for technological solutions, such as spectrometers, rose to 16.36%.

This shift suggests an increasing interest in practical, community-driven approaches over reliance on government action.

Economic pressures and income improvement needs
A consistent focus on improving purchase prices reflects the economic pressures faced by workers. By 2024, 37.38% prioritised higher prices for mining products, alongside calls for better equipment and scale calibration. Although demand for transparency in ore grade measurement declined slightly, this may correlate with the marginal improvement in confidence. Overall, better pricing and marketing fairness remain top priorities for income stability and production growth.

Perceptions of government effectiveness
The mixed perception of government effectiveness, with fewer respondents in 2024 supporting government-led solutions, highlights some disillusionment with government efforts. This shift underlines the importance of enabling local cooperatives and introducing technological measures to supplement government initiatives, fostering a multi-faceted approach to sustainable progress.

Combined insights
Trust remains a significant barrier. The data indicate a growing preference for local and technological interventions to improve the mineral marketing process. Addressing economic needs through better purchase prices is perceived critical to increase production and improve livelihoods for underground workers, pointing to the necessity of a balanced approach that includes local, technological, and government efforts.
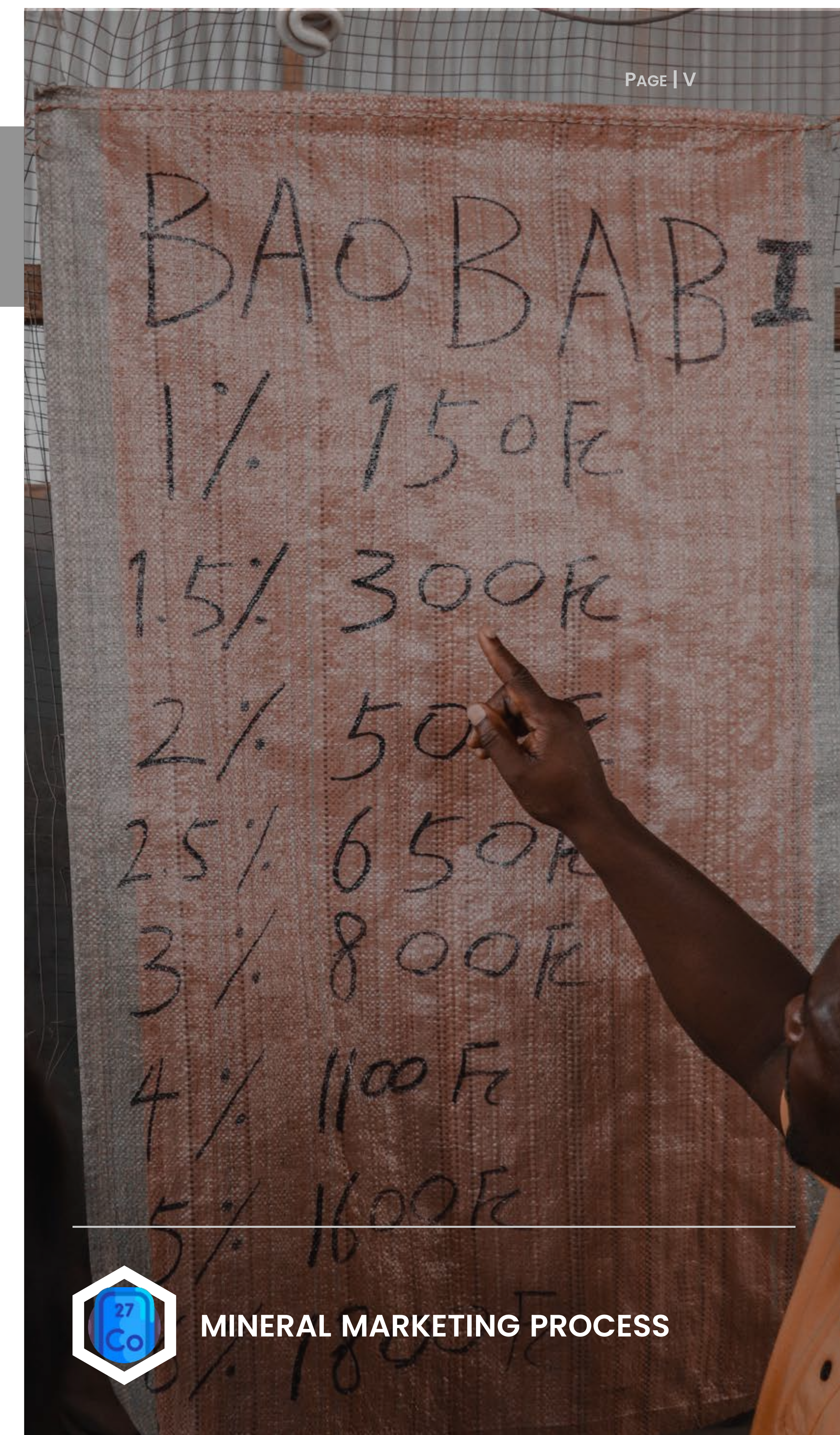
MINERAL MARKETING PROCESS

KEY FINDINGS

COOPERATIVE AND NGO PERCEPTIONS
COOPERATIVE SUPPORT AND NGO AWARENESS

The perceptions of cooperative support and representation at Kamilombe mine have shown shifts over the past year, reflecting both advancements and areas needing attention. Survey data from 2023 and 2024 highlight evolving views among underground workers and Washers on cooperative engagement, medical care, and awareness of community initiatives.

Cooperative engagement and representation
Both underground workers and washers reported feeling increasingly considered by the cooperative, with underground workers' sense of consideration rising from 55.21% in 2023 to 65.96% in 2024 and washers reporting an increase from 94.74% to 96.00%. However, the sense of representation diverged, as underground workers' confidence in being represented dropped from 61.54% to 56.99%, contrasting with washers who maintained a strong, consistent sense of representation at 100%. Perceptions among underground workers on cooperative respon-siveness also varied: although the cooperative's attentiveness improved significantly, rising from 42.11% to 66.32%, involvement in decision-making declined sharply from 69.47% to 35.79%.

Medical care and coverage
Perceptions of the cooperative's role in medical care shifted differently for each group. For underground workers, reliance on the cooperative for healthcare fell from 65.63% to 57.00%, with increased dependence on informal care. Meanwhile, washers reported a significant increase in reliance on the cooperative, rising from 68.42% to 99.00%, indicating a move towards formalised medical arrangements.

The reported scope of coverage has also changed: underground workers increasingly reported the cooperative covers only workplace accidents, rising from 20.63% to 57.89%, while washers report increased coverage for all diseases (from 57.14% to 83.84%). However, coverage for dependents has declined for both groups, underscoring a reduction in perceived or actual benefits.

Community awareness and NGO engagement
Awareness of the Fair Cobalt Alliance (FCA) grew significantly among underground workers, from 8.33% to 43.00%, while washers' awareness remained low, suggesting the need for targeted outreach. Awareness of other NGOs improved, rising from 4.17% to 18.00% among underground workers, and from 0.00% to 1.00% for washers, indicating minimal progress in visibility and engagement.

Combined insights
While progress has been made in inclusivity and awareness, gaps remain in areas like representation, comprehensive healthcare coverage, and dependents' benefits. The rising awareness of FCA and other NGOs offers opportunities for further community engagement, collaboration, and resource mobilisation to meet local needs.

COOPERATIVE AND NGO PERCEPTIONS

KEY FINDINGS

INCOME AND HOUSEHOLD GOODS
VOLATILITY AND FINANCIAL INSECURITY

The financial landscape for underground workers, washers, and community members associated with the Kamilombe mine reflects significant economic challenges, though relative income improvements have been observed across the board. This summary highlights key findings on income stability, savings behaviour, asset ownership, and access to financial services among these groups.

Income (in)stability and challenges
Underground workers face substantial financial instability, with 72% rating their income as "Very unstable" or "Unstable." Primary challenges include fluctuating cobalt market prices (87%) and lack of access to credit (34%). Similarly, washers report financial instability, with only 25% describing their financial situation as stable. The primary concerns for washers are market price fluctuations (76%) and regulatory issues (49%). For community members, financial challenges are also prevalent, especially for those running small businesses, who self-report issues such as high tax rates, agricultural difficulties, and low demand.

Savings and financial inclusion
Savings behaviour varies significantly among the groups. While 55% of underground workers report saving a portion of their income, 44% do not save, indicating reliance on daily earnings. Washers demonstrate a strong commitment to savings, with 87.63% saving or investing, primarily in education (45.36%) and healthcare (35.05%). However, both groups face barriers to formal financial inclusion, with nearly all washers (99%) and underground workers (98%) lacking bank accounts. Community members exhibit the lowest savings rates, with only 10% saving or investing.
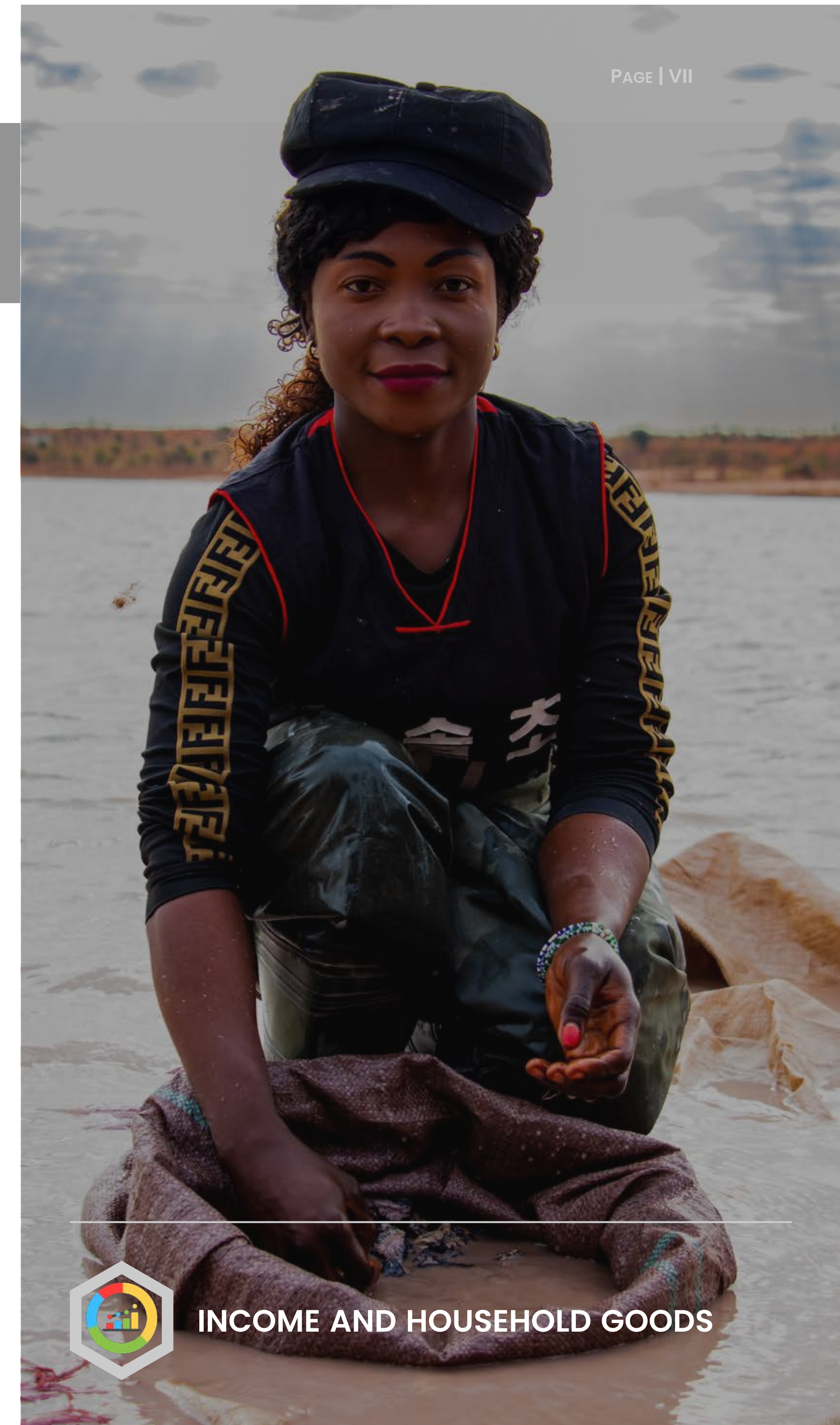
Limited formal banking access leads to reliance on informal savings and loan sources across all groups.

Asset ownership and household goods
Asset ownership remains limited. Among underground workers, 74% are tenants, while only 14% own motorbikes, and a small percentage own vehicles. Basic household goods like radios and televisions are more common, but fridges/freezers and mattresses are less accessible, reflecting limited financial resources. Washers similarly show restricted asset ownership and rely on renting. Community members face similar limitations, with only 2.1% owning cars and 62.4% renting their homes.

Income
Nominal income for underground workers and washers has increased, but inflation has limited real gains in purchasing power. For underground workers, daily earnings rose from 4,286 CDF (USD 2.06) in 2023 to 11,285 CDF (USD 4.18) in 2024—a 102% nominal increase (34% difference). Adjusted for ~20% inflation, real values dropped to USD 1.72 in 2023 and USD 3.45 in 2024, indicating modest improvements in actual purchasing power. Washers experienced a similar pattern: daily income grew from 4,286 CDF (USD 2.06) to 8,000 CDF (USD 2.96), a 32% increase (13.6% difference). With inflation, real purchasing power equated to USD 1.72 in 2023 and USD 2.34 in 2024. Despite nominal income gains, inflation continues to constrain financial security, limiting workers' ability to fully meet basic needs.

INCOME AND HOUSEHOLD GOODS

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KEY TAKEAWAYS

85% OUT OF THE TOTAL SAMPLE FEEL SAFE AT WORK*
+22% SINCE 2023

WASHERS FEEL MORE SAFE THAN DIGGERS **28%**

ACCIDENTS
REMAIN THE BIGGEST CAUSE OF CONCERN FOR WORKERS AND **COMMUNITY MEMBERS**

76% OF THE TOTAL SAMPLE FIND THEIR WORKSPACE CLEAN
WASHERS FIND THEIR WORKSPACE TO BE 41% CLEANER THAN DIGGERS.

FINANCIAL NECESSITY
CONTINUES TO DRIVES CHILD LABOUR

27% OF THE TOTAL SAMPLE HAVE HEARD ABOUT THE FCA
A 117% INCREASE SINCE 2023. DIGGERS ARE 13% MORE LIKELY TO KNOW ABOUT THE FCA

A median of **~$29.26** / WEEK**
is approx. what underground workers generate from cobalt-specific activities in 2024, +34% since 2023

A median of **~$14.81** / WEEK**
is approx. what washers generate from cobalt-specific activities in 2024, +13% since 2023

MALE DIGGERS EARN MORE THAN FEMALE WASHERS **65%**

75% STARTED MINING OUT OF FINANCIAL NECESSITY
AND DUE TO HIGH UNEMPLOYMENT LEVELS

82% OF THE TOTAL SAMPLE
ATTRIBUTE INCOME INSTABILITY TO MARKET PRICE FLUCTUATIONS/DROP IN COBALT PRICES

81% OF THE TOTAL SAMPLE FEEL CONSIDERED BY THE COOP.
A 19% INCREASE SINCE 2023. WASHERS FEEL 37+ MORE CONSIDERED THAN DIGGERS

THE IMPACT FACILITY
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*Despite feeling safe, doing an inherently hazardous work, the sample identified significant risks at the mine. Read more on page 17 and 35.

**Inflation rise has heavily impacted the purchasing power of workers, despite a relative increase. This data is self-reported, and does not include income generated from e.g., copper mining. To note: the data has been collected at a time when the cobalt price is historically low, also impacting miners' earnings significantly. Read more on page 28 and 39.

LEVERAGING INSIGHTS

ADVANCING RESPONSIBLE COBALT
OUR PATH TO AN EQUITABLE AND RESILIENT SECTOR

This report presents key findings that support the Fair Cobalt Alliance's (FCA) mission to create a more equitable, sustainable, and inclusive artisanal cobalt mining (ASM) sector. The insights gathered from surveys across two years highlight the needs, challenges, and perceptions of ASM workers and communities, shaping FCA's priorities in critical areas of improvement and systemic change. FCA's reflections on incorporating these findings into its broader objectives include:

CONTINUOUS IMPROVEMENT THROUGH DATA-DRIVEN ADAPTATION
The FCA is committed to data-driven programme adjustments and longitudinal impact tracking, enabling agile responses to evolving needs. Perception surveys and longitudinal data help the FCA assess intervention effectiveness over time, fostering a sector that is responsive to workers' lived experiences.

**STRENGTHENING MULTI-STAKEHOLDER PARTNERSHIPS FOR SYSTEMIC CHANGE**
Addressing ASM challenges requires collaboration across government, NGOs, private sector, community-based organisations, and global industry leaders. The FCA prioritises partnerships with local and national governments to advance ASM-inclusive policies and resources. Cross-organisational efforts enable FCA to address financial inclusion, child labour, and fair market practices, scaling interventions and unifying efforts across the sector.

EVIDENCE-BASED ADVOCACY FOR WORKER WELLBEING
The survey insights on safety, financial instability, and child labour help inform the FCA's advocacy for stronger safety standards, financial inclusion, and community-based child labour prevention. Collaborating with financial institutions, FCA promotes digital financial services and community savings under the JET Minerals Challenge. The FCA also integrate child labour prevention into broader community development through the Hub, strengthening resilience through educational and child support resources.

SHOWCASING BEST PRACTICES TO PROMOTE GLOBAL MARKET ACCESS
By sharing successful ASM engagement models that emphasise transparency and fair labour practices, the FCA aims to promote market acceptance of responsibly sourced ASM cobalt. This priority not only improves supply chain standards but also positions ASM cobalt as a valuable component of sustainable energy supply chains. Survey insights into miners' trust levels and socioeconomic realities support FCA's work to model inclusive sourcing practices that can be scaled and replicated, creating a benchmark for ASM cobalt in global markets.

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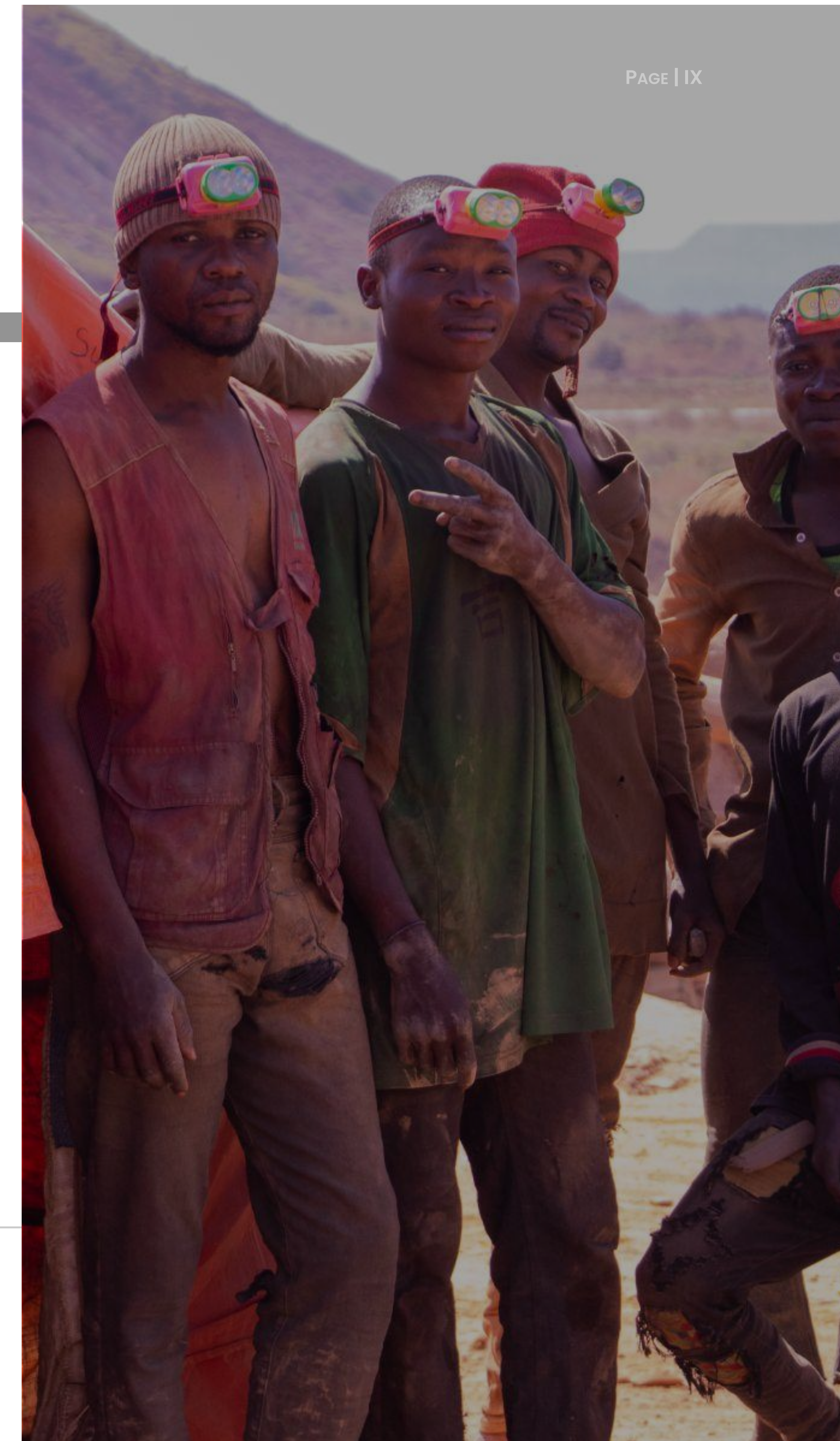
SETTING THE SCENE

CONTEXTUALISING THE REPORT

LEVERAGING PERCEPTIONS TO INFORM POSITIVE IMPACT

The purpose of this report is to present the analysis and findings from two comprehensive surveys conducted by the Fair Cobalt Alliance (FCA) at Kamilombe mine, an artisanal cobalt mining site in Kolwezi, Democratic Republic of Congo (DR Congo). The first survey, conducted in 2023, serves as a baseline study while the second survey, conducted in 2024, is the FCA's first follow-up study. This report aims to provide insights into the socio-economic and operational conditions at the mine site, assess changes over the one-year period, and offer evidence-based recommendations for improving the well-being of miners and the efficiency of mining practices.

Scope of the report

This document is structured to provide a comprehensive overview and analysis of findings from two surveys conducted at Kamilombe Mine in Kolwezi, DR Congo. It begins with contextualising the artisanal cobalt mining (ASM) sector and the role of the Fair Cobalt Alliance (FCA).

It then outlines the scope and objectives of the 2023 baseline study and the 2024 follow-up survey. The approach and methodology section details the research design, limitations, and statistical conside-rations. The presentation of findings covers key areas such as demographics, profess-ional experience, safety, child labour, mineral marketing processes, stakeholder perceptions, and household goods and income.

Contextualising ASM cobalt

The DR Congo accounts for nearly two-thirds of the world's cobalt. Artisanal and Small-Scale Mining (ASM) stands for about 5-10 percent of that production in the Dr. Congo — and about 10% globally, making it an integral part of the global cobalt supply chain. As the demand for cobalt, used in renewable technology such as, lithium-ion batteries used to power, e.g., electric vehicles, continues to grow — the role of both the DR Congo and ASM in the global energy transition becomes increasingly critical. Despite being formally recognised in national legislation, no legal ASM sites exist in the Dr. Congo to date. Nonetheless, the sector provided a livelihood to an estimated 150.000-250.000 men and women in the country.

CONTEXTUALISING THE REPORT
THE WORK OF THE FAIR COBALT ALLIANCE

About the Fair Cobalt Alliance

Founded in August 2020, the FCA is a multi-stakeholder initiative that seeks a) to transform the cobalt artisanal mining ("ASM") industry to have a positive impact in the Democratic Republic of the Congo (the "DR Congo") by channeling demand for and increasing availability of responsible ASM cobalt, b) to systemically address the root causes of child labour and dangerous practices at artisanal cobalt mining sites, and c) to foster a just transition to a diversified economy to drive the sustainable development of the region.

The FCA achieves this by bringing together various stakeholders along the cobalt supply chain who recognise the development potential of artisanal cobalt mining operations as a legitimate economic activity contributing to the local economy and providing direct and indirect livelihoods for thousands of people in the DR Congo. Currently consisting of 20 members, the FCA's programme is run by The Impact Facility (TIF), a UK-registered Charity with active operations in Kenya, Tanzania, and the DR Congo.

TIF maintains a permanent presence in Kolwezi, the capital of Lualaba Province, to support and coordinate the work of other FCA members, local implementing partners, and a growing partner network and has a presence in Kinshasa to ensure meaningful engagement with relevant government authorities and other key stakeholders at a national level.

The FCA's work is implemented across the various underlying workstreams divided into two approaches: 1) Achieving a tangible impact on mining communities and 2) Creating an enabling environment to catalyse and scale sector-wide efforts to drive the professionalisation of the ASM cobalt sector (see workstreams to the right).

Want to know more about the Fair Cobalt Alliance's work?

Read our 2023 Annual Impact Report **here.**

WORKSTREAMS OF THE FAIR COBALT ALLIANCE

IMPACT WORKSTREAMS

WORKSTREAM I — FAIR & SAFE WORKING CONDITIONS
This workstream aims to establish fair and safe conditions in the artisanal and small-scale mining (ASM) sector by developing clean, professionally managed operations that meet international safety standards. Investment and strategic financing are key to ensuring lasting health and safety improvements, prioritising the well-being and rights of ASM workers.

WORKSTREAM II — CHILD LABOUR PREVENTION AND REMEDIATION
This workstream addresses child labour at informal ASM sites, where a lack of childcare and after-school activities often forces children to these areas. Schools face challenges like inadequate teacher training and essential provisions, leading to high dropout rates. Current support systems end at age 16, leaving gaps in employment alternatives. Our strategy focuses on both remediation and prevention, offering dignified youth employment, after-school programs, childcare facilities, and enhanced school support.

WORKSTREAM III — ECONOMIC RESILIENCE
This workstream aims to enhance economic resilience in ASM through improved incomes, diversified revenue streams, and savings. The Savings Groups Programme has been successful, but formal bank access is needed to secure funds and expand financial services. Strengthening financial literacy, digitising payments, and improving cobalt valuation transparency are also key to building a more equitable and sustainable ASM economy.

ENABLING WORKSTREAM

WORKSTREAM IV — VALUE CHAIN PARTICIPATION
This workstream focuses on integrating artisanal and small-scale mining (ASM) into the formal cobalt value chain by engaging companies and investors. Significant blended finance and industry acceptance of ASM materials meeting international standards are needed for market access. The FCA's objectives include funding impactful interventions, providing trade financing for fair practices, and fostering long-term partnerships. To drive market acceptance, we develop trade models, demonstrate compliance, document business cases, secure permits, and use mechanisms like Responsible Mineral Credits (RMCs).

OUR NEW MEL FRAMEWORK
STRUCTURED AND HOLISTIC LEARNING

The Monitoring, Evaluation, and Learning (MEL) Framework serves as a cornerstone for FCA's interventions, offering a comprehensive methodology to assess and communicate the impact of its initiatives. Developed together with **Levin Sources**, the framework is designed to facilitate a structured approach to monitoring and evaluating the outcomes of FCA's strategic workstreams, ensuring that efforts are aligned with organisational objectives and contributing to meaningful change in target communities.

One of the key functions of the MEL Framework is the development of results chains for each of FCA's strategic workstreams. Results chains provide a visual representation of the logical progression of activities and outcomes, illustrating how inputs lead to outputs, which in turn contribute to desired outcomes and ultimately impact. By mapping out these pathways, FCA gains clarity on the causal relationships between its interventions and the changes it aims to achieve, guiding strategic decision-making and resource allocation.

Moreover, the MEL Framework plays a pivotal role in identifying relevant indicators to measure progress against the work done under each workstream. Indicators serve as quantitative or qualitative measures that provide evidence of change, allowing FCA to track performance, identify areas of success or challenge, and make informed adjustments as needed. These indicators are carefully selected to reflect the specific objectives and priorities of each workstream, ensuring that monitoring efforts are focused and meaningful.

In addition to defining indicators, the MEL Framework elaborates on the proposed methodology for data collection. This involves outlining the tools, techniques, and processes to be used in gathering relevant data, as well as establishing protocols for data management, analysis, and reporting. By standardising data collection methodologies across workstreams, FCA ensures consistency and comparability in the information collected, facilitating accurate assessments of progress and outcomes.

Beyond monitoring and evaluation, the MEL Framework emphasises the importance of learning and adaptive management. It provides mechanisms for capturing lessons learned from FCA's experiences, both successes and setbacks, and integrating these insights into ongoing decision-making and program refinement. This iterative approach to learning ensures that FCA remains responsive to evolving needs and contexts, continuously improving its interventions to maximise impact and sustainability.

In summary, the MEL Framework serves as a dynamic tool for guiding FCA's efforts to measure, evaluate, and learn from its initiatives.

By establishing clear pathways for monitoring progress, identifying relevant indicators, and fostering a culture of continuous learning, the framework strengthens FCA's ability to achieve its mission and create positive change in the communities it serves.

Want to know more about the FCA's MEL Framework? Find our Framework **here.**

THE IMPACT FACILITY

The FCA is focused on fostering responsible cobalt sourcing by addressing critical issues within cobalt mining communities in the Democratic Republic of Congo.

Establishing a holistic MEL framework for the FCA play a crucial role in supporting the achievement of its mission.

These are 8 key reasons
for developing this new framework at this point in time:

ENHANCED ACCOUNTABILITY

A MEL framework provide mechanisms through which the FCA can prove accountability to its stakeholders, including local communities, funders, government bodies, and industry partners. Regular monitoring and evaluation ensure that the FCA's activities are transparent and meet the ethical standards required by international expectations and local regulations.

IMPROVED PROGRAM EFFECTIVENESS AND EFFICIENCY

A MEL framework will provide mechanisms through which the FCA can prove accountability to its stakeholders, including local communities, funders, government bodies, and industry partners. Regular monitoring and evaluation ensure that the FCA's activities are transparent and meet the ethical standards required by international expectations and local regulations.

EVIDENCE-BASED DECISION MAKING

A MEL framework will provide mechanisms through which the FCA can prove accountability to its stakeholders, including local communities, funders, government bodies, and industry partners. Regular monitoring and evaluation ensure that the FCA's activities are transparent and meet the ethical standards required by international expectations and local regulations.

INCREASED IMPACT

By continuously learning from ongoing activities, the FCA can scale up successful initiatives and modify or discontinue less effective ones, leading to greater overall impact. This iterative learning process helps refine strategies to ensure they are directly contributing to e.g., the reduction of child labour and enhancement of mining practices.

STAKEHOLDER ENGAGEMENT AND CONFIDENCE

Regular reporting of verified progress and outcomes increases trust and confidence among stakeholders. For funders and partners, this confidence is crucial for the continuation and expansion of support. For affected communities, it reinforces the credibility of the FCA's efforts and fosters deeper engagement.

SUSTAINABILITY

Sustainability in ASM cobalt mining requires long-term commitments and adaptability to changing social and economic landscapes. The MEL framework supports sustainability by providing insights into the long-term outcomes of interventions, ensuring that benefits are enduring and adaptively managed over time.

POLICY INFLUENCE AND ADVOCACY

Data and findings derived from a robust MEL framework can be powerful tools in advocacy and policy development. Demonstrating concrete results and sharing learned lessons can influence broader industry standards and government policies, amplifying the impact of the FCA's work beyond its immediate operational areas.

RESOURCE MOBILISATION

Demonstrating effectiveness through a MEL framework helps in mobilising additional resources. Funders are more likely to invest in initiatives that can show measurable success and a clear understanding of their impact landscape.

DEFINING OUR FOCUS

STUDY OBJECTIVES
DEFINING NEEDS AND MEASURING CHANGE AT KAMILOMBE MINE

This study, encompassing a 2023 Baseline Survey and a 2024 Follow-Up Survey, aims to provide a clear and data-driven understanding of the socio-economic, demographic, and operational conditions affecting the Kamilombe mine workforce and surrounding community.

The 2023 Baseline Survey
The 2023 Baseline Survey was conducted to establish a foundational understanding of the population demographic, economic, and social characteristics of the workforce and community members associated with the Kamilombe mining operations. Administered over a three-month period from January to March 2023, with data collection occurring in March 2023, the survey aimed to capture a snapshot of the current conditions, perceptions, and challenges faced by these groups, thereby informing future interventions and enabling progress measurement.

The 2024 Follow Up Survey
The 2024 Follow-Up Survey was conducted to assess potential changes that have occurred since the 2023 Baseline Survey. This follow-up helps *contextualise* the effectiveness of interventions implemented in the past year, alongside understanding key trends at Kamilombe Mine and identify new areas of need. Administered between January to March 2024, the follow-up survey mirrored the baseline survey's time frame to maintain consistency and granularity across queries.

Data collection occurred in February, led by two independent consultants (who also administered the 2023 data collection).
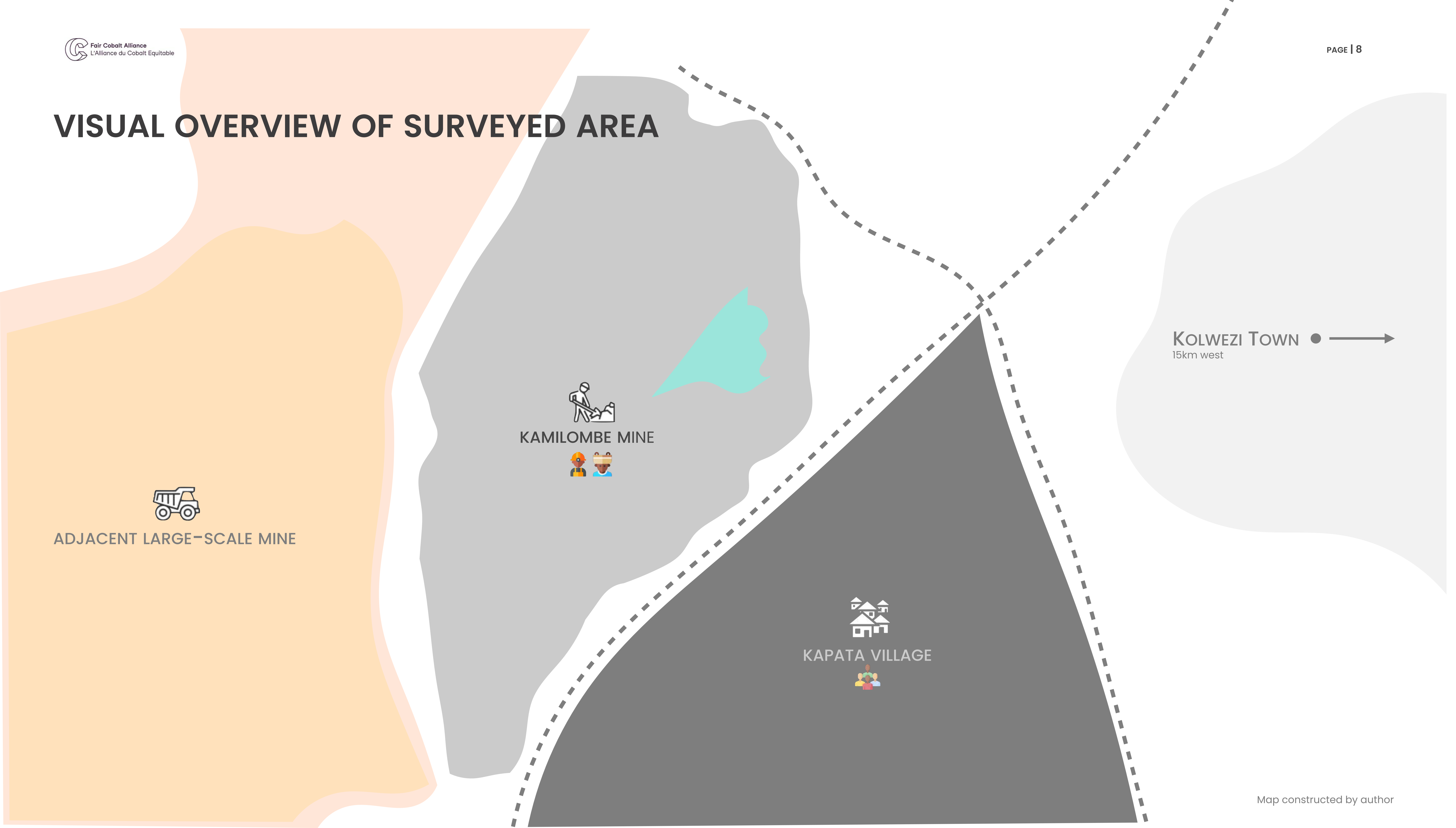
Site Profile: Kamilombe
Kamilombe is a concession in between two large industrial mines, on the outskirts of Kolwezi. It is operated by CMDS artisanal cooperative, short for Coopérative Minière pour le Développement Social. The concession is currently registered as governed under a PE, the mining permit (PE) held by the state-owned mining company, Gecamines — the cooperative hold a Memorandum of Understanding (MoU) with the provincial government allowing its operation.

Miners have been operating at Kamilombe for at least 15 years, with numbers up to 15,000 (and between 3–5,000 at the time of this publication) the same period that CDMS has been active in the area — and 100+ active mine shafts are widely dispersed across the site. There are no major settlements adjacent to the site, but the concession borders the Kapata Village — the community of which is a sample in this study.

VISUAL OVERVIEW OF SURVEYED AREA

KOLWEZI TOWN
15km west

KAMILOMBE MINE

ADJACENT LARGE-SCALE MINE

KAPATA VILLAGE

Map constructed by author

THEMATIC AREAS

DEMOGRAPHICS
& PROFESSIONAL EXPERIENCE

This category gathers essential information about the miners, including their age, gender, education level, family size, work history, skills, and experience of the cobalt mining industry. Understanding both the demographic profile and professional experience helps contextualise the findings and tailor interventions, such as training and skill development, to specific groups within the mining community.

CHILD LABOUR

This category investigates the prevalence and perceptions of child labour in the mining community. It addresses the reasons for child labour, the age at which children start working, and the community's actions to mitigate this issue, aiming to protect children's rights and promote their education.


COOPERATIVE
AND NGO PERCEPTIONS

This category gathers opinions on the involvement and representation of miners within cooperatives and other organisations. It evaluates how well miners feel listened to, their role in decision-making, and their access to benefits, highlighting areas for improvement in stakeholder engagement.

OCCUPATIONAL HEALTH,
SAFETY, AND HYGIENE

This category examines the safety practices and hygiene conditions within the mining sites. It focuses on the availability of safety equipment, adherence to safety protocols, and hygiene measures to ensure the health and well-being of the miners.
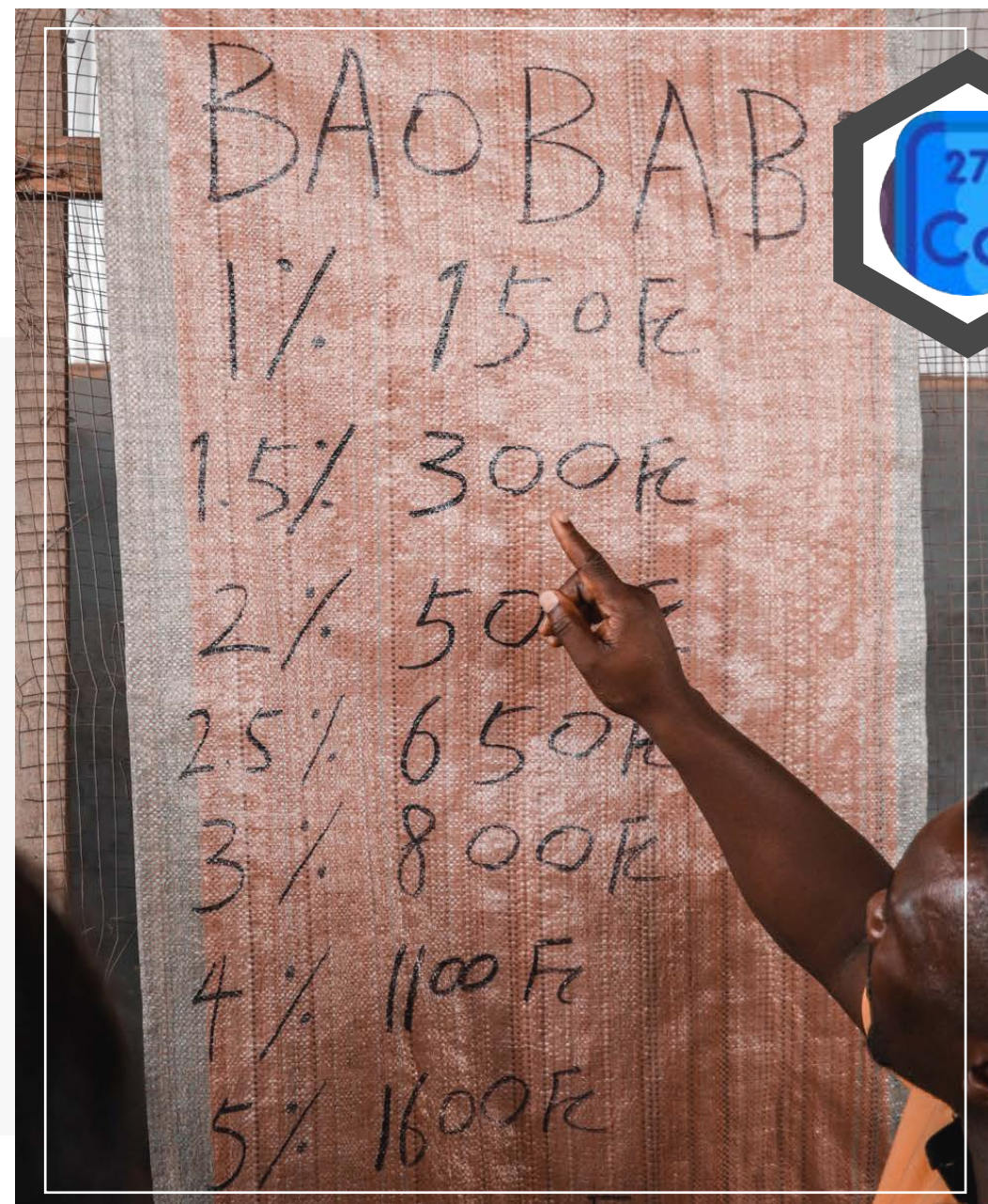
MINERAL
MARKETING PROCESS

This category delves into the miners' perspectives on the marketing and sale of cobalt. It assesses the accuracy of ore grade measurements, transparency in transactions, and the challenges faced in the marketing process to ensure fair trade practices.

INCOME
& HOUSEHOLD GOODS

This category explores the economic conditions of the miners' households, focusing on their income sources, household assets, and financial stability. Understanding the economic landscape helps in designing programs to improve livelihoods and reduce poverty among mining households.

OUR APPROACH & METHODOLOGY

OUR METHODOLOGY
ENSURING COHERENCE AND METHODOLOGICAL VIABILITY

The methodology employed for the 2023 Baseline Survey and the 2024 Follow-Up Survey by the FCA was designed to ensure the collection of reliable, representative, and statistically significant data. This comprehensive approach combines quantitative methods, rigorous sampling processes, and careful consideration of statistical principles to measure quantifiable perceptions related to cobalt-related activities and the wider community.

Quantitative Design

The FCA's annual survey utilises a quantitative methodology to measure perceptions against predefined themes. This approach is aimed at capturing the subjective experiences, attitudes, and beliefs of individuals within specific contexts, particularly those involved in or affected by cobalt-related activities.

The primary data collection tool is the perception survey, which employs closed-ended questions with limited response options to ensure clarity and consistency in responses. Quantitative methodologies are essential for providing a structured approach to data collection.

By using closed-ended questions, we ensure that the responses are standardised, facilitating easier analysis and comparison across different groups and time periods. This method also allows us to quantify perceptions, making it possible to track changes over time and assess the impact of interventions with greater precision.

Sampling Process

The sampling process is meticulously designed to ensure that the data collected is both representative and reliable. The target samples are selected based on their occupation and connection with cobalt-related activities, except for community members who are included to provide a broader contextualisation of the social and economic environment adjacent to the mining area of Kamilombe. **The sampling process involves several key steps:**

1. **Focus Groups:** As a precursor to survey development, focus groups are conducted with representatives from each target group. These discussions help refine the survey questionnaires to ensure they are relevant and comprehensive.

2. **Survey Questionnaires:** The questionnaires are developed with closed-ended questions, tailored to correspond to the relevant target groups. These questions are designed to capture the key perceptions and experiences of the respondents.

3. Target Population

Underground Workers
Gender Representation: Male (100%)
Total Number, Population: 3-5,000*
Total Sample 2023: 96 respondents
Total Sample 2024: 100 respondents

Washers
Gender Representation: Female (100%)
Total Number, Population: 100-500*
Total Sample 2023: 19 respondents**
Total Sample 2024: 100 respondents

Kapata Community
Gender Representation: Male (45%) Female (55%)
Total Number, Population: 13,000***
Total Sample 2023: 95 respondents
Total Sample 2024: 100 respondents

*Estimated number at the time of the survey. No official headcount exists currently. Numbers fluctuate depending on production, in turn depending on cobalt prices. At the time of the survey, production (and prices) were low.

**At the time of the 2023 Survey, there were too few washers on site to adapt a similar sample size as with underground workers. As such, the sample was made smaller — meant to provide indicative statistics. Sample size was adjusted in 2024 since the number of washers on site had increased.

***Estimated number. Not the entire Kapata Community is located adjacent to Kamilombe. Focus of the sampling was made to the area directly adjacent to the concession.

OUR METHODOLOGY CONTINUED

ENSURING COHERENCE AND METHODOLOGICAL VIABILITY

Overall, the sampling process ensures that we capture a diverse range of perspectives within each group. By using focus groups to develop the survey, we ensure that the questions are relevant and that the responses will provide meaningful data. The selection criteria based on occupation and connection to cobalt activities ensure that we gather data from individuals most affected by these activities, while including community members allows us to contextualise the broader social and economic environment adjacent to the mining area of Kamilombe.

Sample Process, cont.

The sample group was extended from 210 respondents in 2023 (96 underground workers, 95 Kapata community members, and 19 washers) to 300 respondents in 2024 (100 underground workers, 100 community members, and 100 washers).

The main reason for the extension was 1) due to the low number of washers on site during the 2023 survey and 2) due to the 2023 findings that the group of washers (which, at the time, was a so-called indicative sample) should be tested against a larger group of respondents — to identify whether there are significant differences across an otherwise homogeneous, and smaller, population.

Ensuring Statistical Significance

Achieving statistical significance is critical for the reliability of the survey results. Several statistical principles and considerations guide the determination of sample size and the interpretation of data:

- **Law of large numbers:** This principle states that as the sample size increases, its mean will approach the population mean. For the FCA surveys, a sample size of around 100 is often sufficient to observe this effect, given the relatively small variability in the data and the desired confidence and precision levels.

- **Central limit theorem:** This theorem indi- cates that the distribution of sample means will tend to be normal, regardless of the population distribution shape, provided the sample size is sufficiently large (typically more than 30 to 50 samples). This allows for the estimation of confidence intervals and hypothesis testing.

- **Specificity of the population:** If the population is relatively homogeneous with respect to the variables of interest, a smaller sample size may still accurately capture population characteristics. For example, if the perceptions of 5,000 workers are similar in their cobalt-related activities, a smaller sample size may be sufficient to draw reliable conclusions.

- ### Margin of Error

In social research, a margin of error of 5-10% is generally acceptable. With a sample size of 100 and assuming a 95% confidence level, the margin of error is approximately 10%, which is adequate for preliminary insights or when trends do not vary significantly.

MoE calculation underground workers*
For a sample size of 100 from a population of 5000, the margin of error at a 95% confidence level is approximately 9.70%.

$$MoE = 1.96 \times \sqrt{0.5 \times 0.5/100} \times \sqrt{5000 - 100/5000 - 1}$$

MoE calculation washers
For a sample size of 100 washers from a fluctuating population of 400, the margin of error at a 95% confidence level is approximately 8.49%.

$$MoE = 1.96 \times \sqrt{0.5 \times 0.5/100} \times \sqrt{400 - 100/400 - 1}$$

1.96 is the z-score for a 95% confidence level, and the terms represent the standard error and finite population correction.

LIMITATIONS & STRENGTHS

These statistical principles are foundational to ensuring that our survey results are both reliable and meaningful. By carefully considering the Law of Large Numbers and the Central Limit Theorem, we ensure that our sample sizes are sufficient to provide accurate estimates and meaningful insights. The margin of error considerations help us understand the precision of our estimates, while the specificity of the population ensures that our samples accurately reflect the characteristics of the broader group. However, While perception surveys offer numerous advantages, they also come with inherent limitations - both listed below:

Understanding the limitations and strengths of perception surveys is crucial for interpreting the results accurately. While responses' subjectivity introduces a degree of bias, these surveys' cost-effectiveness and efficiency make them valuable tools for large-scale data collection. Standardisation allows for consistency in data collection over time and across different locations, facilitating meaningful comparisons and trend analysis.

Limitations

- **Subjectivity:** Responses are subjective and can be influenced by biases such as social desirability, response bias, and memory bias. Participants might provide answers that align with societal expectations or in-accurately recall past experiences.

- **Reliability:** The inherent subjectivity can compromise the objective reliability of the survey results, as the data cannot provide objective measurements or verifiable facts.

Strengths

- **Cost-effectiveness:** Perception surveys are relatively inexpensive to administer, making them feasible for large-scale data collection.

- **Efficiency:** These surveys are quick to deploy and can be replicated across various localities, mine sites, and countries.

- **Standardisation:** The surveys can be standardised and reused, enabling longitudinal studies* and cross-sectional comparisons** across different groups, times, and geographies.

- **Representative trends:** With targeted sample sizes achieving statistical significance, the surveys can indicate representative trends across the broader population of artisanal cobalt operators in Kolwezi.

*Longitudinal studies involve repeated observations or measurements of same variables over an extended period to track changes and trends over time.
**Cross-sectional comparisons analyse different groups, with same variables, to identify differences and similarities.

Discussion: Using Perceptions as Data

Perceptions can be quantified, but are not quantitative. Perceptions can be assigned numerical values or ratings, making them quantifiable for analysis. However, they differ from traditional quantitative data because they reflect subjective experiences influenced by individual biases, emotions, and context. While they offer valuable insights, perceptions are not purely objective measurements and should be interpreted carefully alongside other data.

The perceptions presented in this report should therefore be treated as a collection of experiences, insights of which are valuable in themselves, yet does not provide an entirely full view of reality. The FCA is committed to scaling its monitoring and evaluation efforts through a dynamic approach — triangulating and extrapolating data with complementary information from project monitoring and evaluation (PME) and a consistent presence in all operating areas of Kamilombe and Kapata.

This survey study, however, is solely limited to the perceptions collected through the 2023 baseline and the 2024 follow-up. Other insights, collected in different aspects of the FCA's programmes, can be found in the FCA's 2022 and 2023 Annual Impact Report.
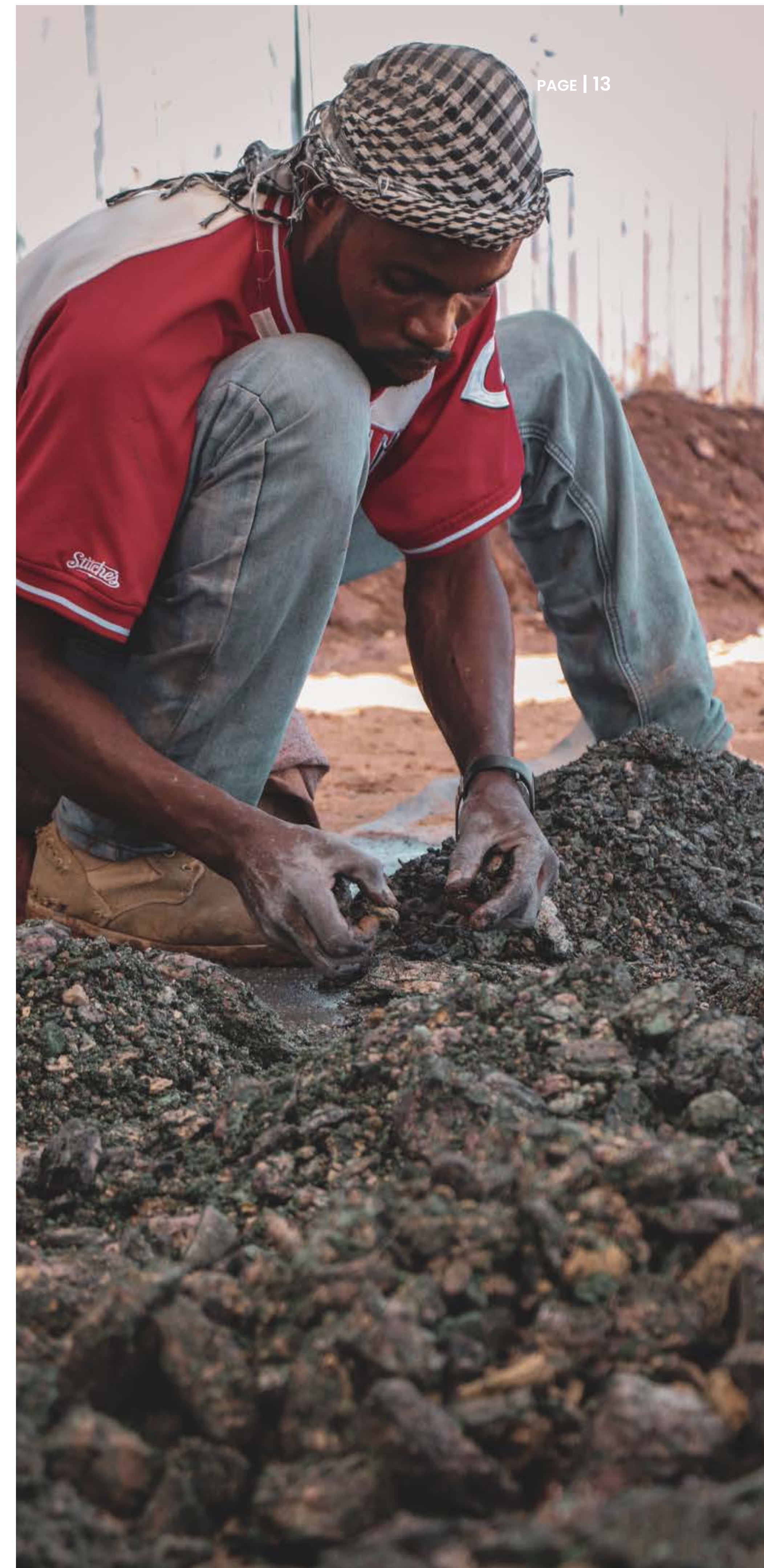
PRESENTATION OF FINDINGS

Presentation of Findings

Demographics & Professional Experience

Occupational Health, Safety & Hygiene

Child Labour

Mineral Marketing Process

Stakeholder and NGO Perceptions

Household Goods & Income

SECTION ONE
UNDERGROUND WORKERS

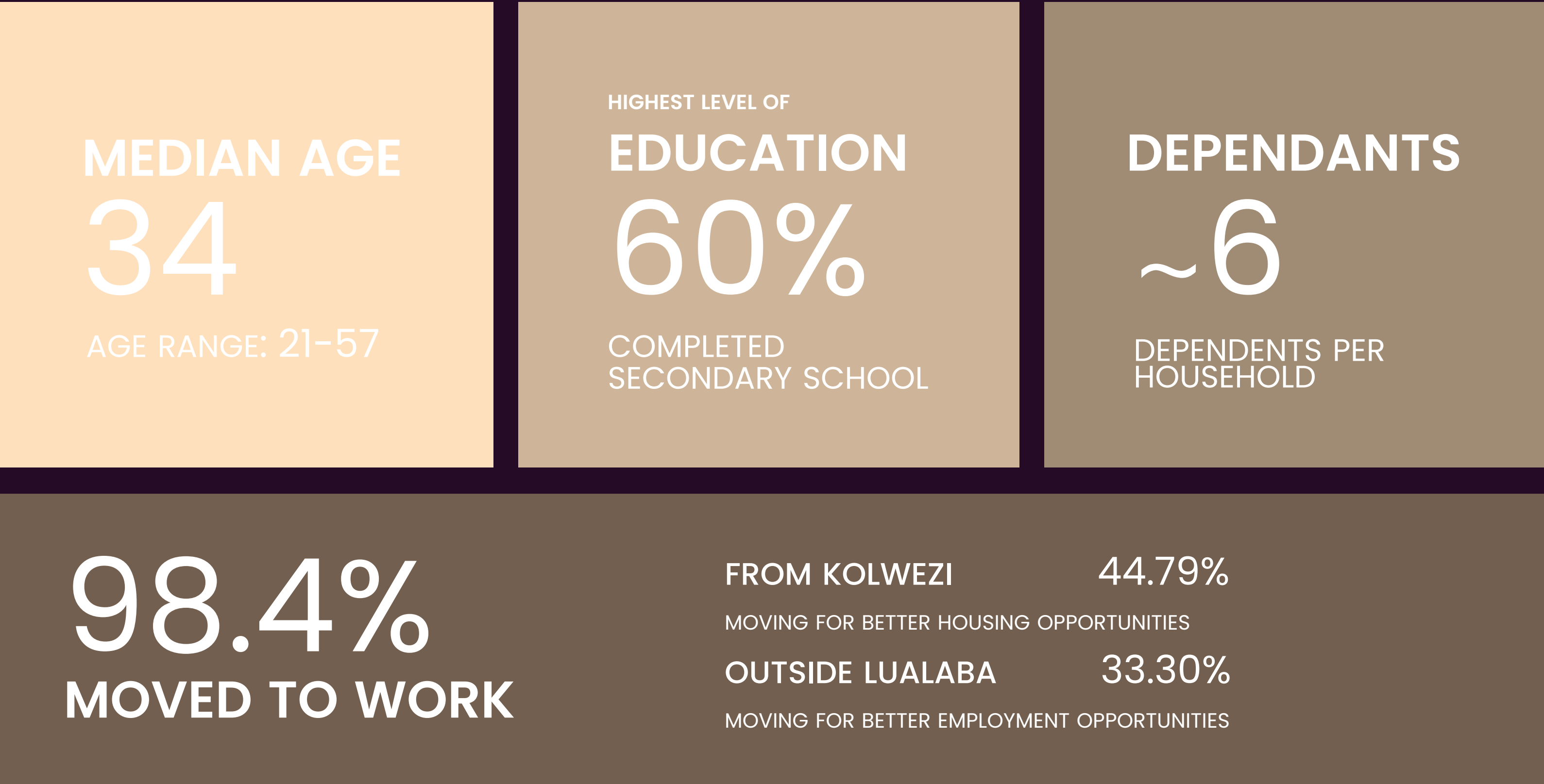Gender Representation: Male (100%) • 2023 Sample Size: 96 • 2024 Sample Size: 100

Annual Survey of The Fair Cobalt Alliance, 2023/2024
© Photo: Olivier Delafoy

DEMOGRAPHICS
& PROFESSIONAL EXPERIENCE

The collected term "underground workers" represents a male occupation at Kamilombe and more broadly within the artisanal and small-scale mining (ASM) cobalt sector. Data reveals that the median age of these workers is 34 years, with 73% being over 25 years old, most commonly between 26 and 35 years - a significant difference from the national median age of 17 years in the DR Congo in 2023, marking a 106% higher median age among workers. Notably, no worker below the age of 18 was recorded. These workers rely heavily on mining as their primary occupation, with very few reporting alternative income sources, such as agriculture. This dependency is not limited to the workers themselves, as the average household in the sample supports 5.78 dependents.

The median duration of employment in the mines is six years, with the most common tenure being two years, representing 14% of the total sample, and the longest recorded tenure reaching 25 years. Interestingly, 8.3% of respondents began mining before the age of 18, with the youngest starting at 8 years old and the oldest at 15. Additionally, 98.4% of underground workers do not come from the same neighbourhood in which they currently reside. A significant portion, 44.79%, originated from a different neighbourhood within Kolwezi, while 33.3% came from the Greater Katanga region (excluding Lualaba), demonstrating the economic pull of the mining sector. Employment and housing opportunities were the main reasons for relocation, with the former being particularly strong among those from Greater Katanga, while housing needs drove most relocations within Kolwezi. Despite the strong economic draw of mining, only 15% of workers reported moving specifically to work in the mines.

In terms of prior employment, no significant trends were observed, but common previous occupations included being a student (16% of respondents), working as a merchant (13%), and running a small business (12%). The top reasons cited for entering mining were a lack of alternative work opportunities, noted by 34% of respondents, followed by the need for money (31%) and the perception that mining pays better than other available work (26%). This highlights the economic realities driving the workforce into the cobalt mining sector.

KEY DEMOGRAPHICS

MEDIAN AGE
34
AGE RANGE: 21-57

HIGHEST LEVEL OF
EDUCATION
60%
COMPLETED
SECONDARY SCHOOL

DEPENDANTS
~6
DEPENDENTS PER
HOUSEHOLD

98.4%
MOVED TO WORK

FROM KOLWEZI   44.79%
MOVING FOR BETTER HOUSING OPPORTUNITIES

OUTSIDE LUALABA   33.30%
MOVING FOR BETTER EMPLOYMENT OPPORTUNITIES

PROFESSIONAL EXPERIENCE

AVERAGE
of
6
YEARS OF
MINING EXPERIENCE

REASONS FOR MINING

UNEMPLOYMENT/NO OTHER WORK   34%
LOOKING FOR AN INCOME   31%
MINING PAYS BETTER THAN OTHER ACTIVITIES   26%

8.3% STARTED MINING BEFORE THE AGE OF **18**, THE YOUNGEST AT **8** YEARS OLD*

*There is no geographic location defined by the respondents who noted that they started mining before 18 years of age.

OCCUPATIONAL
HEALTH, SAFETY & HYGIENE

PERCEPTION OF SAFETY AND ACCIDENTS

The survey data indicates a slight improvement in the perception of safety among the miners from 2023 to 2024. Specifically, there was a 3.16% increase in the number of workers who feel safe, rising from approximately 69.79% in 2023 to 72% in 2024. Correspondingly, there was a 7.32% decrease in the number of workers who do not feel safe, dropping from approximately 30.21% to 28%. Notwithstanding, despite a majority feeling safe while at work — more than 1 in 4 of workers feel unsafe at the mine site. The witnessing of accidents remain high (with no changes between baseline and follow up) at 84% of the sample having witnessed at least one accident at Kamilombe — and 75% having witnessed at least one fatal accident at the site. Whilst the data differs between perceived risks and reported causes of accidents, the most prevailing challenge faced at Kamilombe is mine collapses (in turn caused by landslides/ground subsidence). Lastly, 43% of the sample does not have health care coverage, of which only 42% are covered for any type of illness/accident that could occur at work.

PERCEPTION OF SAFETY

69.8% 2023
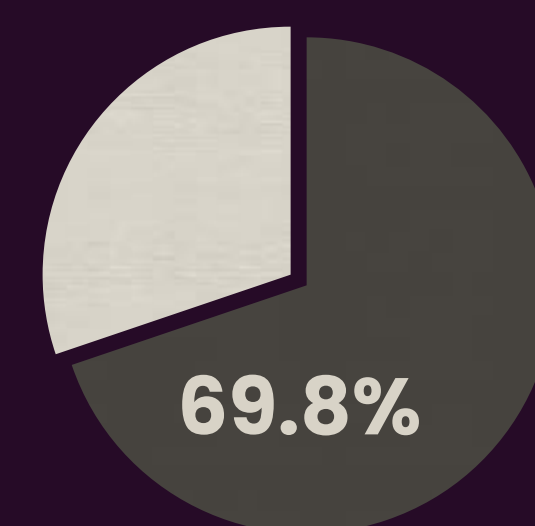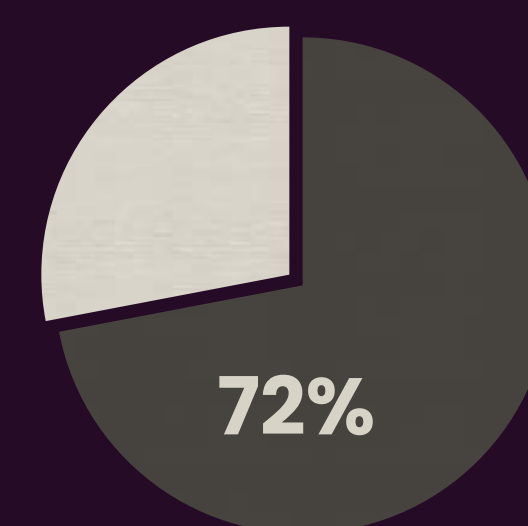
72% 2024

YES, I FEEL SAFE
+3.16%
CV: 2.21%

● Yes (I feel safe)
○ No (I do not feel safe)

WITNESSING OF ACCIDENTS

84%
HAVE WITNESSED AT LEAST ONE ACCIDENT

75%
HAVE WITNESSED AT LEAST ONE **FATAL** ACCIDENT

MAIN CAUSES OF ACCIDENTS

47% MINE COLLAPSE
CAUSED BY LANDSLIDES, GROUND SUBSIDENCE, E.G.

18% FALL OF A PERSON

13% FLOODING

12% FALL OF ORE BAGS

HEALTH CARE

57%
ARE COVERED BY THE COOPERATIVE

58%
ONLY GET ACCIDENT COVERAGE

OCCUPATIONAL
HEALTH SAFETY & HYGIENE

RISK ANALYSIS AND SHAFT STABILITY

The main risk at mine level is clearly denoted as the risk of mine collapse, which can be caused, for example, by landslides, ground subsidence. As a follow-up, a specific inquiry was made to the state of the shafts at Kamilombe, elaborated below. The miners' ratings of the mine shaft walls have experienced some shifts between 2023 and 2024. In 2024, 29.00% of respondents indicated that only a few of the walls are strong, which represents a 13.38% increase from the 15.63% who felt this way in 2023. This rise suggests a growing concern among some miners about the strength of the walls in certain sections of the mine. Conversely, the percentage of miners who believed that all walls are strong and solid decreased from 83.33% in 2023 to 71.00% in 2024, reflecting a -12.33% variance. The category of miners who rated none of the walls as solid saw a slight decrease, from 1.04% in 2023 to 0.00% in 2024, resulting in a -1.04% variance.

The suggested improvements to mine safety was reported as follows, ranked:
1. Correct cracks in the shaft walls (59%)
2. Regular maintenance of the mine shaft (55%)
3. Secure shafts with timbering (45%)
4. Solidify the shaft structures (28%)
5. Avoid surface loads (14%)
6. Secure shafts with sand bags (14%)
7. Avoid vibrations from machinery (3%)
8. No need to improve at all (3%)

RISK ANALYSIS, BY MOST SIGNIFICANT PERCEIVED RISK

84%	**RISK OF MINE COLLAPSE**
17%	**RISK OF PEOPLE FALLING**
17%	**RISK OF BAGS OF ORE FALLING**
17%	**RISK OF ROCKS FALLING**
9%	**RISK OF FLOODING**

SHAFT STABILITY, SPECIFIC INQUIRY

STATEMENT 1: ALL WALLS OF THE SHAFT ARE STRONG AND STABLE

83% AGREED IN **2023**   **71%** AGREED IN **2024**   DECREASE BY **-15%** CV: -12.3%

STATEMENT 2: ONLY A FEW WALLS OF THE SHAFT ARE STRONG AND STABLE

16% AGREED IN **2023**   **29%** AGREED IN **2024**   INCREASE BY **+87%** CV: +13.38%

STATEMENT 3: NO WALLS OF THE SHAFT ARE STRONG AND STABLE

1% AGREED IN **2023**   **0%** AGREED IN **2024**   DECREASE BY **-100%** CV: -1%

OCCUPATIONAL
HEALTH SAFETY & HYGIENE

FLOODING, VENTILATION & LIGHTING

FLOODING

While a majority of workers do not perceive flooding as a material risk (only 9%), nor as a main cause of accidents (only 13%) a total of 40% of the sample reported occurrences of flooding at their shaft in 2024. The main attributed cause was rainfall, directly affecting shafts that are uncovered (76%). As such, the predominant precaution noted as relevant by the workers was covering the shaft (87%) followed by channeling rainwater (51%).

VENTILATION

A total of 68% reported that their shaft has got the appropriate ventilation. Out of the 32% that noted that their shaft was not properly ventilated, 52% reported having experienced respiratory issues — requesting to install proper ventilation systems and reinforcing existing ones.

LIGHTING

Lastly, a vast majority reported that they have no issues with lighting in the mines (76%) — and 70% noting they are satisfied with the usage of lamps/torches while at work. Notwithstanding, many also noted that the prices for batteries are high — with workers paying CDF 6000 (USD 3/battery in 2023) per battery every two weeks.

FLOODING

40%
EXPERIENCE FLOODING FREQUENTLY

76%
ATTRIBUTE THE PROBLEM TO RAINFALL AND UNCOVERED SHAFTS
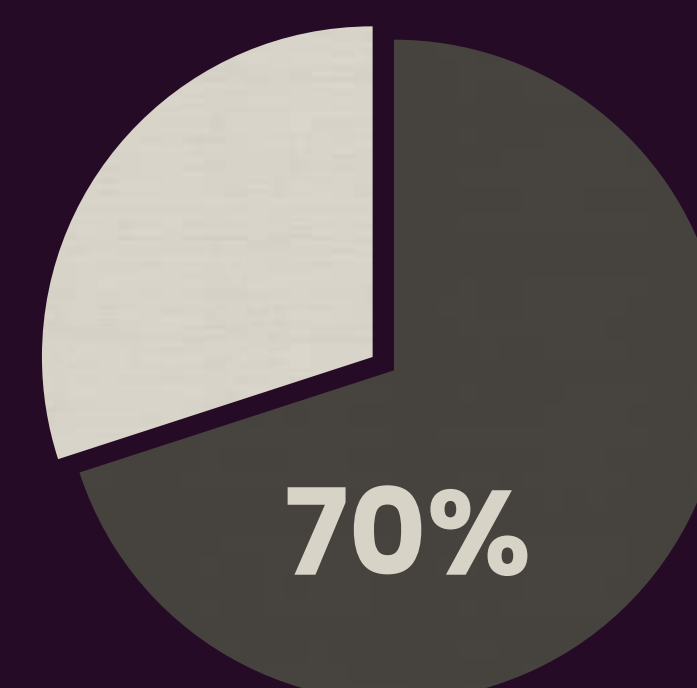
87% wants pit coverage

VENTILATION

68%
ARE SATISFIED WITH THEIR SHAFT VENTILATION

52%
OF THE 32% THAT DO NOT HAVE PROPER VENTILATION HAVE EXPERIENCED **RESPIRATORY ISSUES**

LIGHTING

70%
Satisfaction Rate (%)
with shaft lighting

OCCUPATIONAL
HEALTH SAFETY & HYGIENE

KNOWLEDGE ABOUT SAFETY & APPLICATION OF SAFETY MEASURES

KNOWLEDGE

In the 2023 baseline survey, the highest awareness of safety measures among miners was for "Do not work under the influence of alcohol" (80.2%), followed by "Work in good light" (67.7%) and "Inspect the state of the shaft" (47.9%). Measures such as "Do not sit in the middle of the shaft" (11.5%) and "Do not work at night" (18.8%) were less commonly known. Overall, the data suggests a varied understanding of safety practices, with significant awareness in some areas but notable gaps in others.

In the 2024 follow-up survey, there was a continued high awareness for "Do not work under the influence of alcohol" (76%) and "Work in good light" (67%). However, awareness of certain measures, such as "Do not sit in the middle of the shaft" (2%) and "Do not work at night" (7%), remained very low. Notable improvements were seen in measures like "Inspect the state of the shaft" (57%) and "Use the rope correctly" (53%). Despite these improvements, there were also areas where awareness significantly decreased, such as "Use protective equipment" (12%) and "Analyse the risks and make decisions" (18%).

Comparing the changes between 2023 and 2024, several safety measures showed increased awareness, including "Inspect the state of the shaft" (9.1% variance) and "Use the rope correctly" (12.4% variance). Conversely, some measures saw a substantial decrease in awareness, most notably "Do not work in the rain" (-28.4% variance), "Use protective equipment" (-17.2% variance), and "Analyse the risks and take decisions" (-17.4% variance).

APPLICATION

In the 2023 survey, the highest application of safety measures among artisanal miners was for "Do not work under the influence of alcohol" (69.8%), followed by "Work in good light" (52.1%) and "Inspect the condition of the shaft" (37.5%). Measures such as "Do not sit in the middle of the shaft" (11.5%) and "Use protective equipment" (4.2%) were less commonly applied. The data indicates a gap between awareness and actual application, with significant knowledge in some areas not necessarily translating into practice.

In the 2024 follow-up survey, the highest application of safety measures continued to be for "Do not work under the influence of alcohol" (73%) and "Work in good light" (60%). Improvements were observed in several areas, including "Inspect the condition of the shaft" (52%) and "Use the rope correctly" (43%). However, some measures remained poorly applied, such as "Don't work at night" (5%) and "Do not sit in the middle of the shaft" (1%).

Comparing the changes between 2023 and 2024, several safety measures showed increased application, including "Inspect the condition of the shaft" (14.5% variance) and "Use the rope correctly" (10.7% variance). Conversely, some measures saw a substantial decrease in application, most notably "Do not work in the rain" (-22.0% variance) and "Avoid distractions (music, etc.)" (-13.4% variance). These variances highlight areas where safety practices have improved and areas where further emphasis is needed to ensure safety measures are not just known but also consistently applied.

COMPARATIVE ANALYSIS, KNOWLEDGE V. APPLICATION

In 2023, the data reveals a significant gap between knowledge and application of safety measures among artisanal miners. For example, 80.2% of respondents were aware that they should not work under the influence of alcohol, but only 69.8% actually applied this measure, showing a variance of -10.4%. Similarly, while 67.7% knew they should work in good light, only 52.1% did so, reflecting a variance of -15.6%. The largest gap was seen in the use of protective equipment, with 29.2% aware of this measure but only 4.2% applying it, resulting in a variance of -25.0%. This pattern indicates that despite high awareness in some areas, practical application often falls short.

In 2024, while there were improvements in the application of certain safety measures, the gap between knowledge and application persisted. For instance, 76% of respondents knew they should not work under the influence of alcohol, but 73% applied this measure, showing a smaller variance of -3%. The variance for working in good light also decreased to -7%, with 67% awareness and 60% application. However, the use of protective equipment remained a significant issue, with 12% aware but only 4% applying it, resulting in a variance of -8%. Notably, some measures saw an increase in the application gap, such as "Do not sit in the middle of the shaft," with a variance increasing from -11.5% in 2023 to -1% in 2024.

Overall, the comparison between knowledge and application of safety measures reveals persistent gaps that need to be addressed. The most significant variances were observed in areas requiring protective measures and situational awareness.
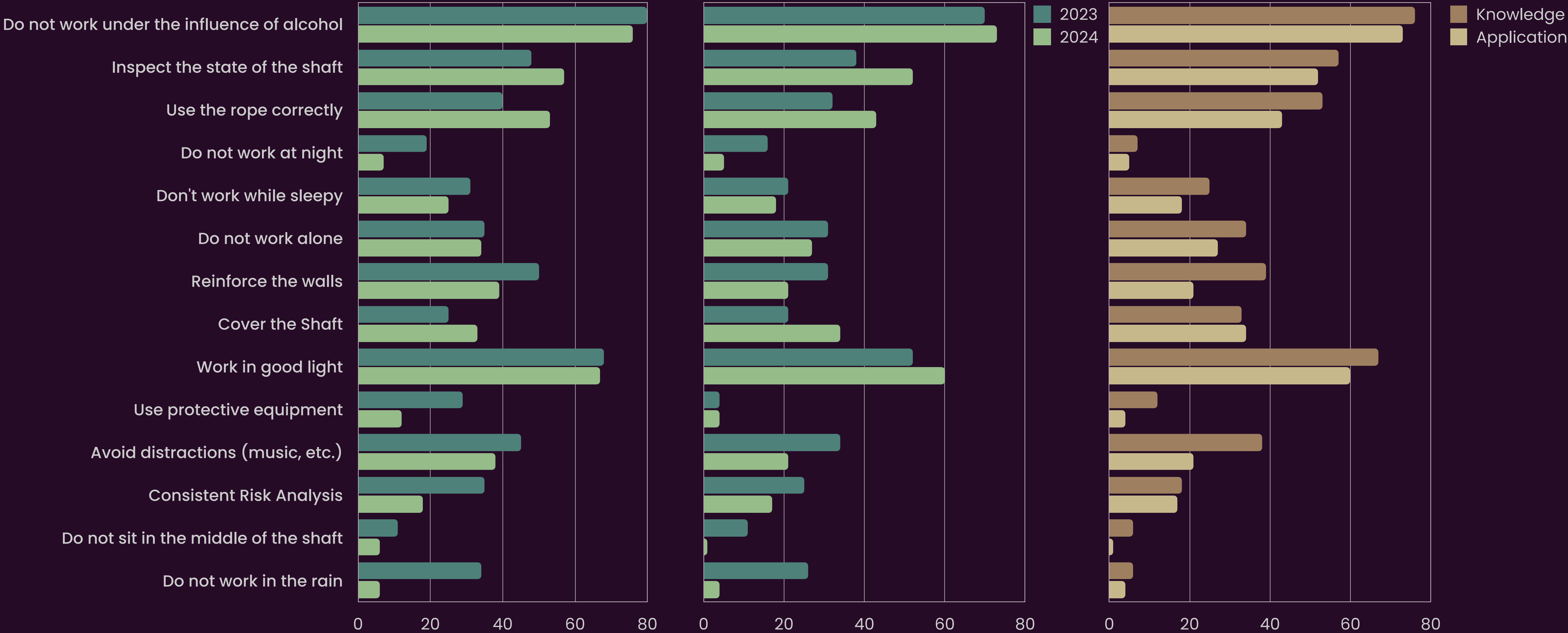
OCCUPATIONAL
HEALTH SAFETY **&** HYGIENE

PERSONAL PROTECTION EQUIPMENT

KNOWLEDGE OF PPE

In the 2023 survey, the most commonly known personal protective equipment (PPE) among underground workers were the Torch (86.5%), Helmet (80.2%), Boots (78.1%), and Gloves (76.0%). Less familiar items included Goggles (44.8%) and Safety belts (30.2%). Other PPE items such as Cap (4.2%), Face mask (2.1%), and various protective clothing had minimal awareness.

In the 2024 follow-up survey, knowledge of PPE items saw some changes. The Torch remained the most recognised item (90%), followed by Helmet (73%), Gloves (61%), and Boots (43%). Knowledge of Goggles (29%) and Safety belts (12%) decreased compared to the previous year. Other PPE items like Cap (2%), Face mask (1%), and various protective clothing remained low in awareness.

Comparing the changes between 2023 and 2024, several PPE items showed increased awareness. For instance, knowledge of the Torch increased by 3.5% (86.5% to 90%), while Helmet saw a decrease of 7.2% (80.2% to 73%). Gloves had a notable decrease of 15.0% (76.0% to 61%), and Boots saw a significant drop of 35.1% (78.1% to 43%). Overall, the variances indicate that while some PPE items have become more familiar, others have seen a decline in awareness, highlighting areas for potential improvement in PPE education.

APPLICATION OF PPE

In the 2023 survey, the actual use of PPE among artisanal miners was significantly lower than awareness. The most used items were the Torch (79.2%) and Gloves (41.7%), while the use of Helmet (9.4%), Boots (14.6%), Goggles (2.1%), and Safety belts (7.3%) was much lower. Various other protective clothing items like Cap and Face mask had minimal usage.

In the 2024 follow-up survey, usage patterns showed some improvement. The Torch remained the most used item (89%), followed by Gloves (37%), Helmet (16%), and Boots (16%). Usage of Goggles increased slightly to 5%, while Safety belts saw a significant decrease to 2%. Other protective clothing items continued to have low usage rates.

Comparing the changes between 2023 and 2024, several PPE items showed increased usage. The Torch usage increased by 9.8% (79.2% to 89%), while Helmet usage increased by 6.6% (9.4% to 16%). Gloves saw a decrease in usage by 4.7% (41.7% to 37%), and Safety belts usage decreased significantly by 5.3% (7.3% to 2%). These variances suggest some improvements in the adoption of certain PPE items, but also indicate areas where usage has declined and requires attention.

COMPARATIVE ANALYSIS, KNOWLEDGE V. APPLICATION

In 2023, the gap between knowledge and application of PPE was significant. For example, while 80.2% of respondents knew about Helmets, only 9.4% used them, showing a variance of -70.8%. Similarly, knowledge of Boots was 78.1%, but usage was 14.6%, resulting in a variance of -63.5%. The largest gap was seen in Safety belts, with 30.2% awareness but only 7.3% usage, a variance of -22.9%. This pattern indicates that despite high awareness, the actual application of PPE was much lower.

In 2024, the gap between knowledge and application of PPE persisted. For instance, knowledge of Helmets was 73%, but usage was only 16%, showing a variance of -57%. Boots had a knowledge rate of 43% and a usage rate of 16%, resulting in a variance of -27%. Safety belts had a 12% knowledge rate but only 2% usage, a variance of -10%. These figures highlight that while awareness remains relatively high, the application of PPE continues to lag behind significantly.

Overall, the comparison between knowledge and application of PPE reveals persistent gaps that need to be addressed. Despite high levels of awareness for items like Helmets, Boots, and Gloves, the actual usage remains low.
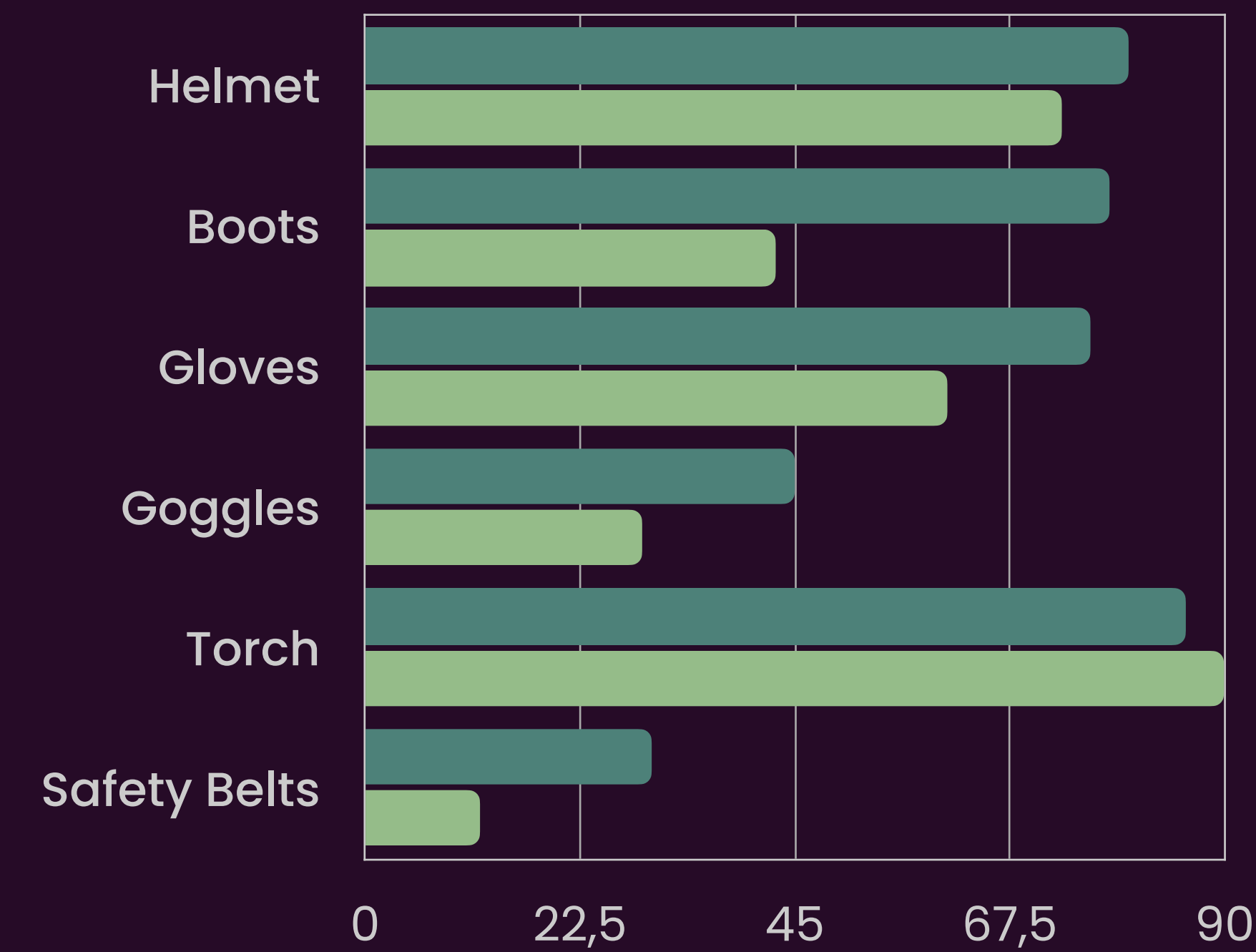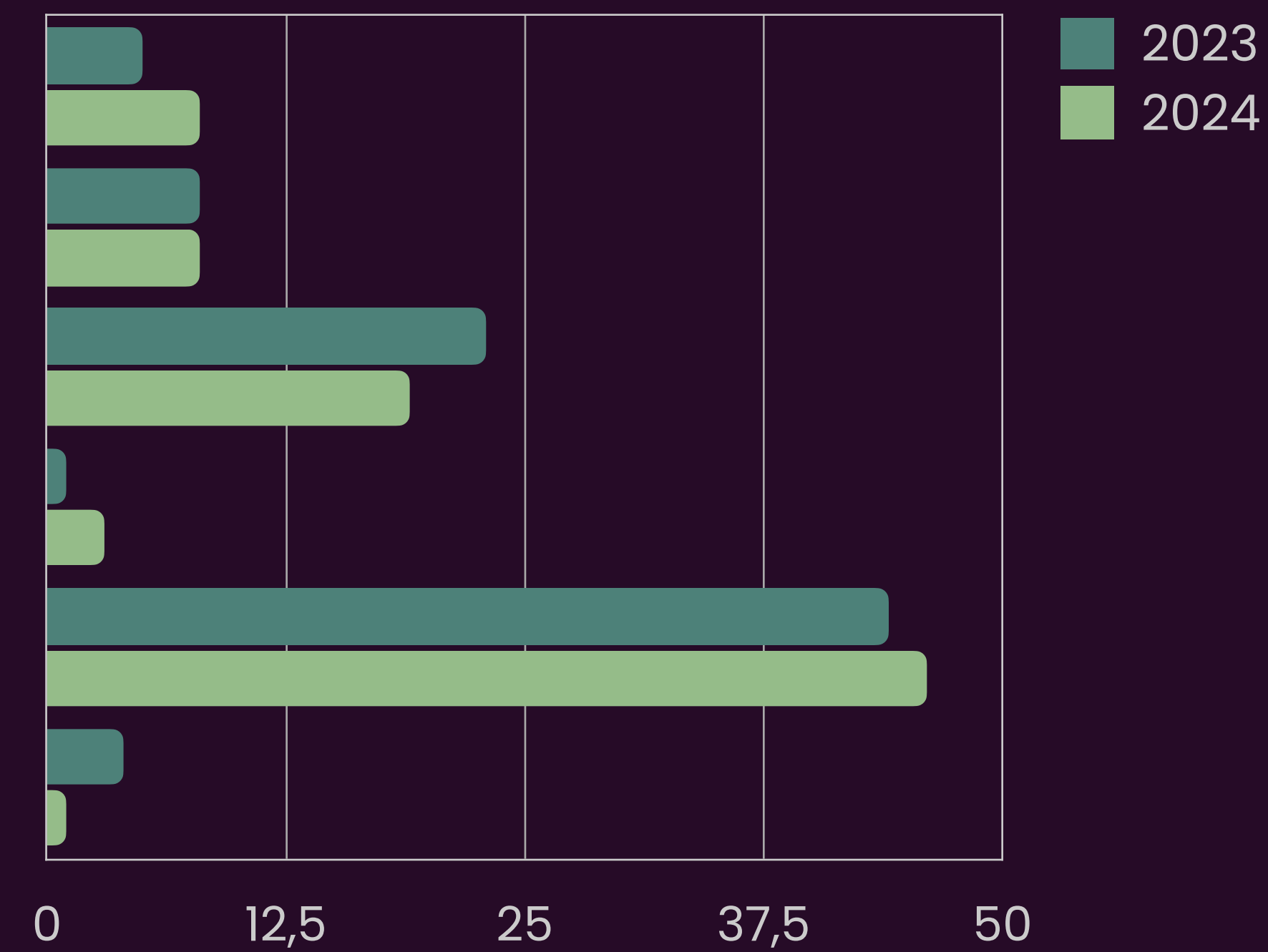
NEXT PAGE FOR VISUALS OF THE ABOVE

KNOWLEDGE OF PPE UTILITIES

ALL NUMBERS ARE IN PERCENTAGES (%)

- Helmet
- Boots
- Gloves
- Goggles
- Torch
- Safety Belts

0 — 22,5 — 45 — 67,5 — 90

APPLICATION OF PPE UTILITIES

ALL NUMBERS ARE IN PERCENTAGES (%)

- 2023
- 2024

0 — 12,5 — 25 — 37,5 — 50

COMPARISON KNOWLEDGE V. APPLICATION

ALL NUMBERS ARE IN PERCENTAGES AND 2024 NUMBERS (%)

- Knowledge
- Application

0 — 22,5 — 45 — 67,5 — 90
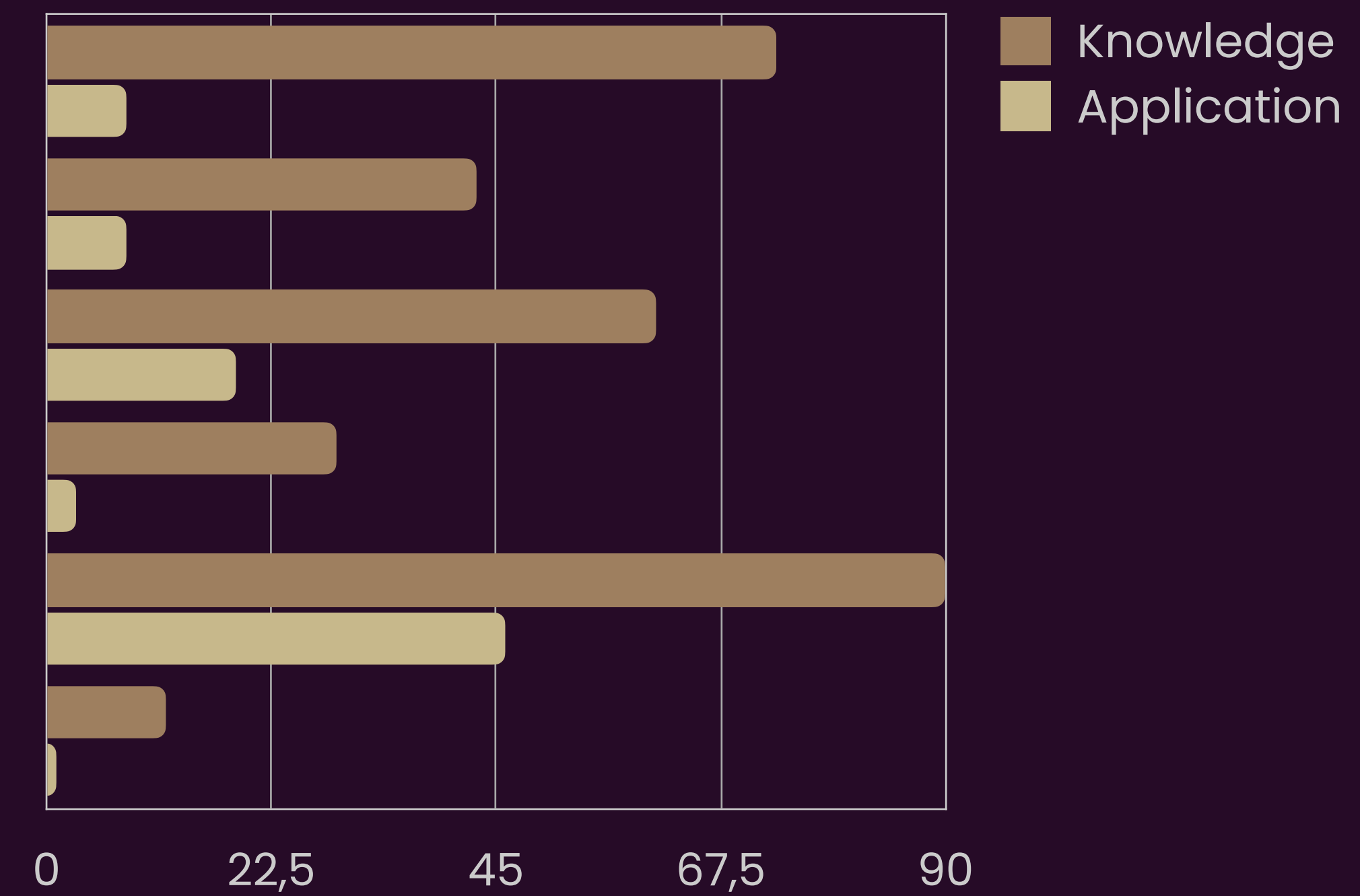
FREQUENCY OF USAGE

PERSONAL PROTECTION EQUIPMENT

2023
- Always
- Sometimes
- Not at all

2024
- Always
- Sometimes
- Not at all
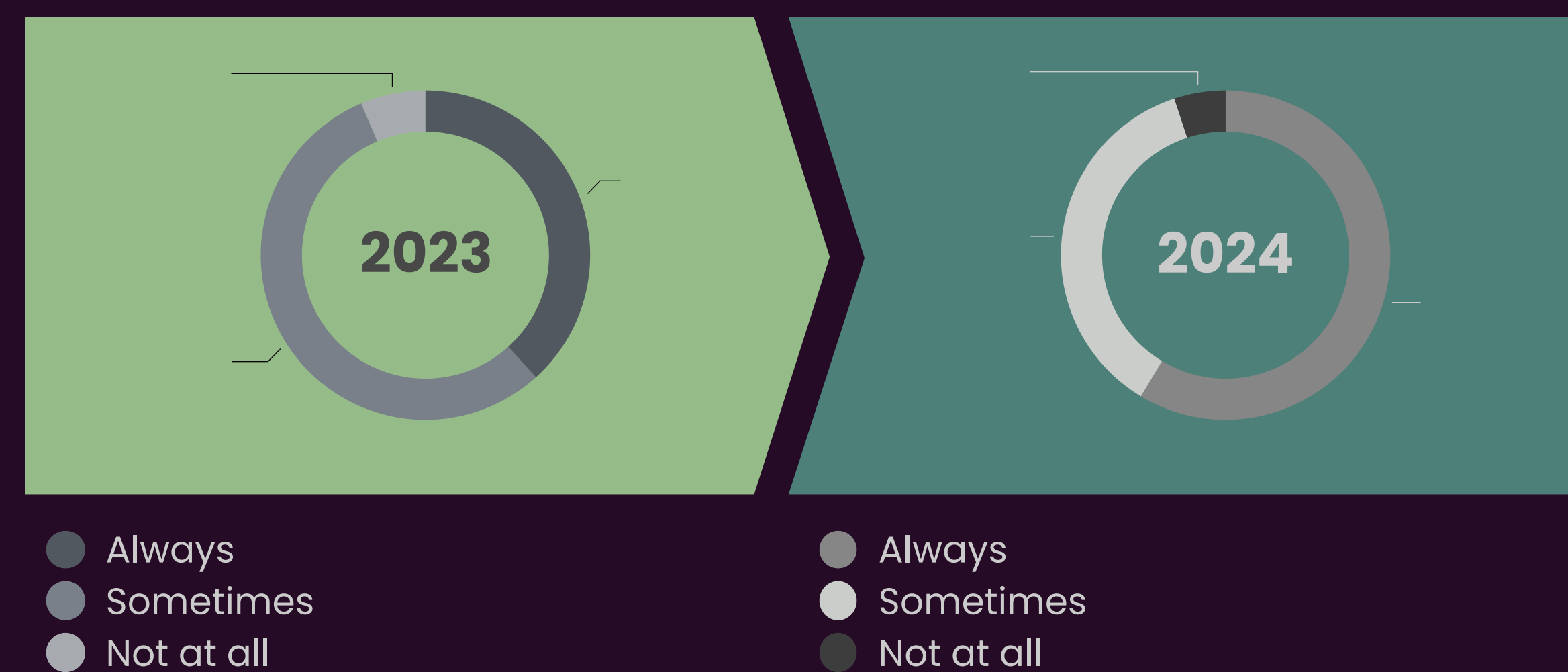
STATEMENT 1
I ALWAYS USE PPE WHEN WORKING (+53% / CV +20%)

STATEMENT 2
I SOMETIMES USE PPE WHEN WORKING (−34% / CV −19%)

STATEMENT 3
I NEVER USE PPE WHEN WORKING (−21% / CV −1%)

OCCUPATIONAL
HEALTH SAFETY & HYGIENE

HYGIENE

IMPROVEMENT IN SITE CLEANLINESS

There was a noticeable improvement in the perception of cleanliness at the mine site among underground workers from 2023 to 2024. In 2023, only 28.13% of workers considered the site clean, but this percentage increased significantly to 55% in 2024. This indicates a positive shift in hygiene conditions over the year.

PERSISTENT TOILET ISSUES

Despite improvements in cleanliness, toilet problems remain a significant concern. In 2023, 92.93% of workers acknowledged a toilet problem, slightly improving to 88% in 2024. The primary solutions suggested include adding more toilets (69.84%), maintaining existing ones (4.76%), and equipping toilets with necessary supplies (7.14%).

RECOMMENDATIONS FOR IMPROVING CLEANLINESS

To enhance site cleanliness further, the main recommendations include building toilets (57.43%) and installing rubbish bins (10.89%). Awareness raising and training were less frequently mentioned (3.96%), indicating a preference for structural improvements over behavioural interventions.

WORKSPACE HYGIENE AND SANITATION

28%
FOUND THAT THEIR WORKSPACE WAS CLEAN AND HYGIENIC AT BASELINE
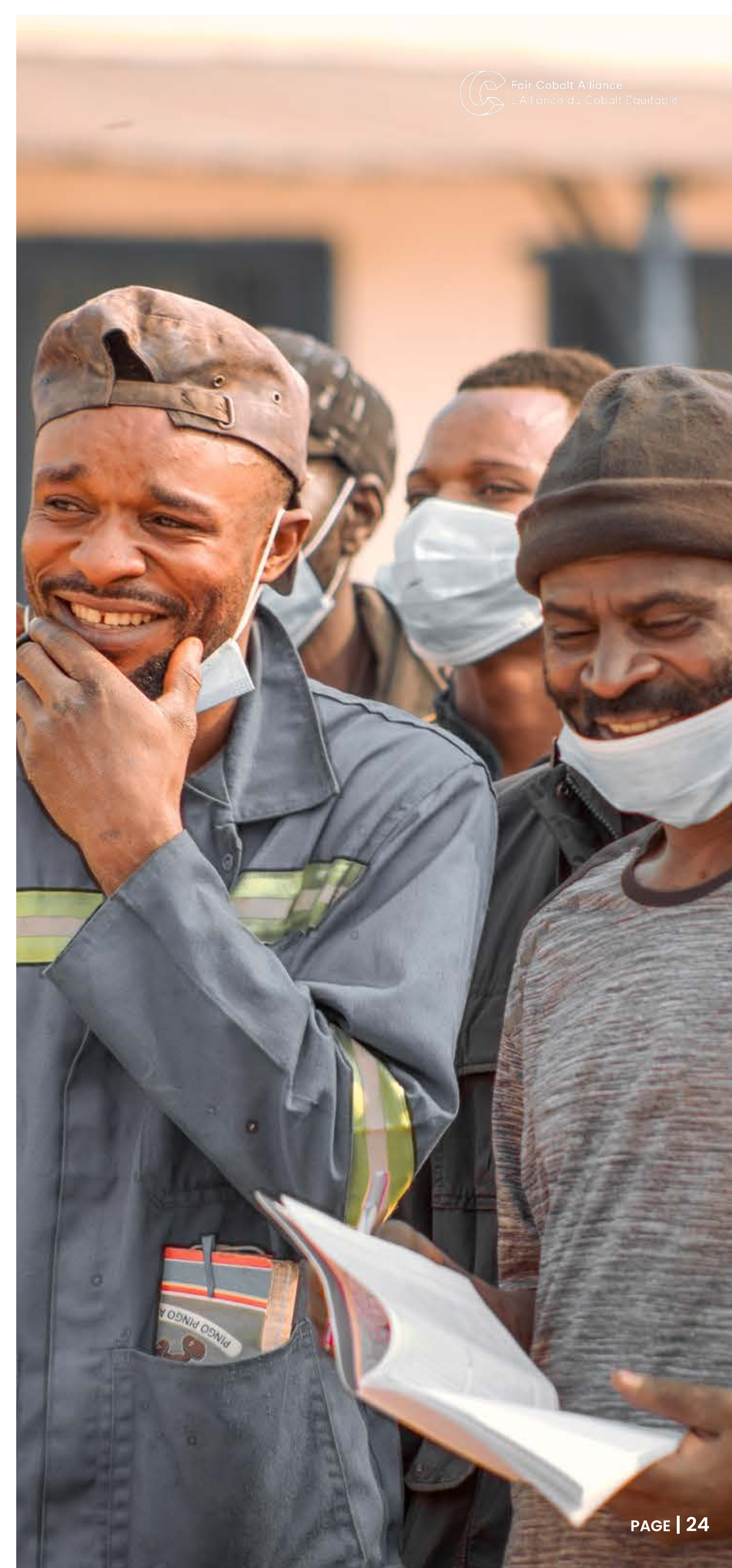
IMPROVEMENT IN 2024
+27%

93%
FOUND THAT THERE ARE SERIOUS TOILET ISSUES AT THE WORKSPACE

SLIGHT IMPROVEMENT IN 2024
−5%

70%
WANT ADDITIONAL TOILETS ON SITE. 57% NOTED ADDING TOILETS AS THE BEST WAY TO IMPROVE SITE HYGIENE AND CLEANLINESS

CHILD LABOUR

The Fair Cobalt Alliance complements its understanding of the context and experiences of child labour data by collecting annual perceptions and experiences related to child labour directly from the workers at Kamilombe and the community of Kapata, building on the robust data collected by its partners, The Centre and Save the Children. This additional data serves as a cross-check to enrich the extensive findings from partners' networks.

A strong 89% of underground workers note that child labour is not prevalent in the community. No worker noted that there is any reason for a child to work in the mines, though 65% highlighted that economic necessity is the main driver for child labour, followed by lack of educational opportunities (46%). Should a worker encounter child labour, the most cited action was to "chase the child away" (86%) followed by report the child to the mine police (48%). Only 12% would confront the person employing the child, and only 11% would refer the child to child care or remedial structures.

A majority of the workers deem government efforts to combat child labour to be effective (either very effective [32%], effective [26%] or fairly effective [13%]) at a total of 72%. A total of 28% of the sample deem the government efforts to be ineffective. Furthermore, a total of 53% know about local initiatives at Kamilombe that aim to prevent and/or combat child labour in the mines —— 89% of which deem those initiatives to be effective. The initiatives cited was predominantly the cooperative's efforts to remediate child labour.

EXTENT OF CHILD LABOUR

89%
NOTED THAT CHILD LABOUR DOES NOT OCCUR AT ALL IN THE COMMUNITY

10%
NOTED THAT CHILD LABOUR IS RARE, BUT OCCURS OCCASIONALLY

65% note economic necessity as the predominant cause of child labour

REMEDIATION EFFORTS

72%
BELIEVE THAT GOVERNMENT EFFORTS TO COMBAT CHILD LABOUR ARE EFFECTIVE

89%
BELIEVE LOCAL INITIATIVES, SUCH AS BY THE COOPERATIVE, ARE EFFECTIVE

PERCEIVED MINIMUM AGE

63%
BELIEVE THE MINIMUM AGE FOR WORKING IN THE MINES SHOULD BE 18 YEARS

0%
SUPPORT ANYONE BELOW 18 TO WORK IN THE MINES

37% NOTED 20 YEARS+

86% WOULD "CHASE THE CHILD AWAY" AS PREDOMINANT ACTION

MINERAL MARKETING PROCESS

The mineral marketing process refers to, predominantly, the cobalt trade. The data presented herein therefore encapsulates issues such as workers relationship with traders —— and perceptions pertaining to fairness of terms in the trade dynamic. It also considers key measures suggested by the sample, showcasing significant proposed solutions by a wide range of underground workers at Kamilombe. The aggregated data from the 2023 and 2024 surveys paint a comprehensive picture of the underground workers' perceptions and knowledge regarding the mineral marketing process. The findings highlight several key trends and implications:
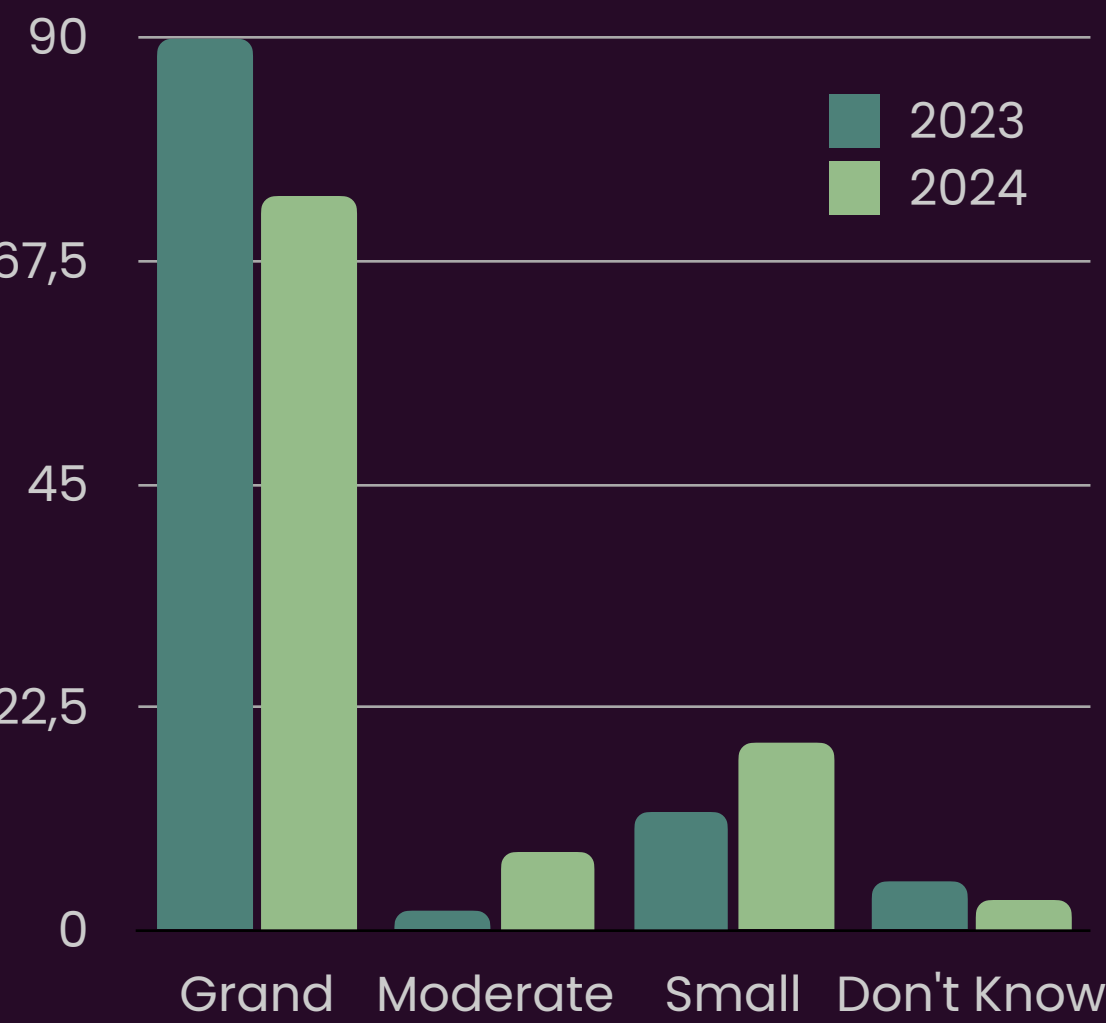
- **Improvement in perceived accuracy:** There has been a noticeable increase in the confidence of workers regarding the correctness of ore grade measurements by traders. However, the majority still express doubts, indicating that while improvements have been made, significant trust issues remain.

- **Seriousness of discrepancies:** Although fewer respondents consider the discrepancies in ore grade measurements as a "Grand" issue in 2024, it remains a major concern. The growing perception of the discrepancy as a moderate or small issue may suggest adaptation or slight improvements in measurement practices.

- **Evolving solutions:** The shift from reliance on government intervention to a preference for local cooperative involvement and technological solutions such as spectrometers reflects a move towards more localised and practical approaches to resolving the discrepancies in ore grade measurements.

- **Focus on economic improvement:** The consistent emphasis on improving the purchase price of mining products underscores the economic pressures faced by underground workers. The increased demand for better equipment and transparency in grade measurement points to a need for improved operational standards and fairness in the trading process.

- **Mixed success of government efforts:** The decrease in respondents favouring government intervention suggests a mixed perception of the effectiveness of government actions. This highlights the importance of empowering local cooperatives and implementing technological solutions to complement government efforts.

PERCEIVED FAIRNESS OF ORE GRADING MEASUREMENT BY TRADERS

90% 2023   **79%** 2024

DECREASE BY
-11%

Statement 1: I do not have confidence that the ore grading measurement is done correctly by traders

Statement 2: I have confidence that the ore grading measurement is done correctly by traders
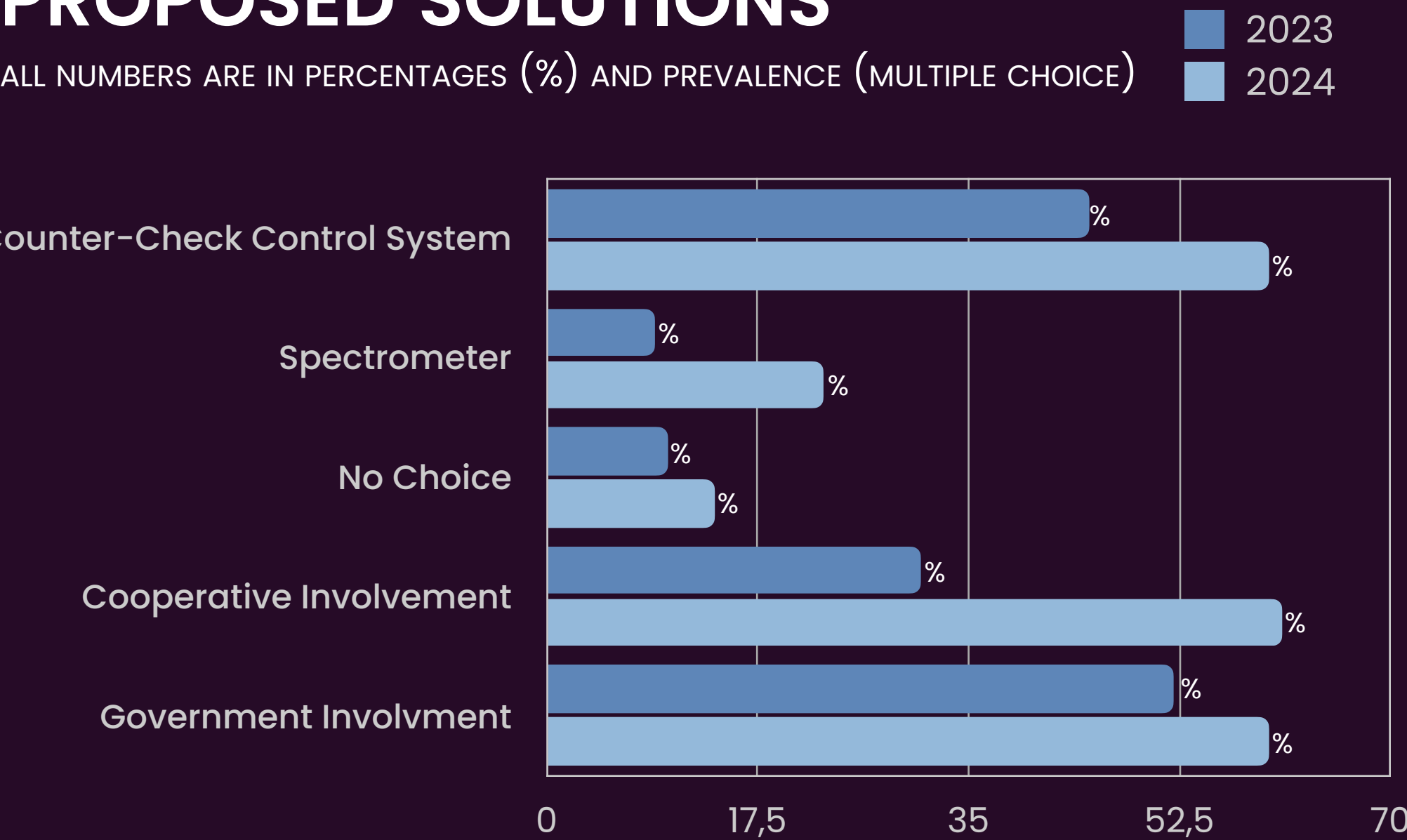
DISCREPANCY

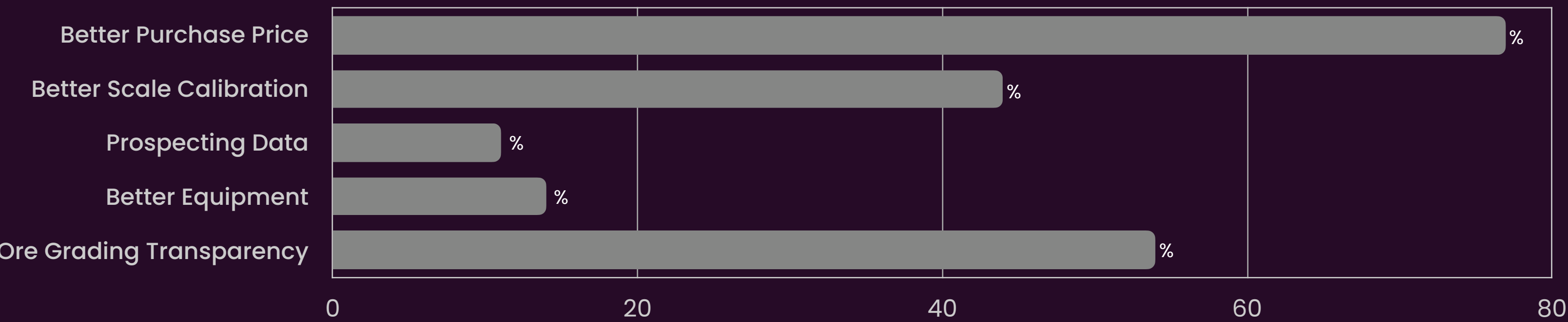ALL NUMBERS ARE IN PERCENTAGES (%)

PROPOSED SOLUTIONS

ALL NUMBERS ARE IN PERCENTAGES (%) AND PREVALENCE (MULTIPLE CHOICE)

KEY NEEDS TO INCREASE PRODUCTION & IMPROVE INCOME

ALL NUMBERS ARE IN PERCENTAGES (%) AND ARE SORTED BY % OF TOTAL SAMPLE

COOPERATIVE AND NGO PERCEPTIONS

The survey data from 2023 and 2024 illustrate evolving perceptions among stakeholders regarding their engagement and the effectiveness of cooperative actions. The findings highlight several key trends and implications:

- **Improved consideration:** There was a positive shift in stakeholders feeling considered by the cooperative, suggesting better communication and inclusivity efforts. However, the decline in perceived representation highlights a need for more robust mechanisms to ensure all members feel adequately represented.

- **Mixed feedback on cooperative actions:** While there was significant improvement in the perception that the cooperative listens to its members, the unchanged response rate to grievances and the decline in involvement in decision-making suggest areas for further improvement.

- **Medical care and coverage:** The decreased reliance on cooperative-provided medical care, paired with an increase in staff-provided care, suggests a shift towards more informal healthcare arrangements. The cooperative's medical coverage has increasingly focused on workplace accident treatment, with limited benefits for dependents, underscoring areas for potential policy improvement. However, the cooperative's current efforts to establish a dedicated medical facility for workers and their dependents are promising. Once operational, this facility could provide much-needed healthcare support, aligning with the cooperative's goal to enhance worker welfare.

- **Increased awareness of FCA and NGOs:** The substantial increase in awareness of the Fair Cobalt Alliance and other NGOs reflects successful outreach efforts and growing community engagement. This heightened awareness can be leveraged to foster collaboration and enhance the impact of these organisations in improving local conditions.

PERCEPTION OF THE COOPERATIVE

+10%
Increase since 2023

66%
FEELS CONSIDERED BY THE COOPERATIVE

−5%
Decrease since 2023

57%
FEELS REPRESENTED BY THE COOPERATIVE

STATEMENT 1: YOU PERCEIVE THAT THE COOPERATIVE LISTENS TO YOU

2023 42% AGREED
2024 63% AGREED

INCREASE BY
+21%

STATEMENT 2: YOU PERCEIVE THAT THE COOPERATIVE RESPONDS TO YOUR GRIEVANCES

2023 51% AGREED
2024 49% AGREED

DECREASE BY
−2%

STATEMENT 3: YOU PERCEIVE THAT THE COOPERATIVE INVOLVES YOU IN DECISION-MAKING

2023 69% AGREES
2024 34% AGREES

DECREASE BY
−35%

AWARENESS OF THE FAIR COBALT ALLIANCE

INCREASE BY
+35%

2023 **9%**

2024 **43%**

INCOME
& HOUSEHOLD GOODS

This section provides an analysis of the financial situation of workers engaged in ASM at Kamilombe Mine. The analysis encompasses perceived income stability, the impact of external factors, reasons for financial instability, key financial challenges, savings behaviour, asset ownership, and lastly income. Together, these insights offer a view of the economic conditions faced by these workers. The data was gathered through the surveys conducted in 2023 (baseline) and 2024, asking workers different questions regarding their financial situation and income generation from cobalt-specific mining (i.e., not including copper).

There are important limitations to recall when interpreting the data. Measuring income through perception surveys presents notable challenges, primarily due to the subjective nature of how individuals perceive and report their earnings. Respondents' perceptions are influenced by a variety of factors, including personal financial obligations, social comparisons, and societal norms, which can lead to inaccuracies in self-reported data due to biases like the desire to conform to social expectations. Additionally, the definition of income can vary widely among individuals, encompassing not just formal wages but also informal earnings and financial support from non-employment sources.

These factors, combined with the potential for income to fluctuate over time, including inflation rates, make it difficult to obtain accurate and consistent data on income levels solely through perception-based surveys in a professional context. The FCA, thus, still has a way to go before accurate and comprehensive income data can be captured at Kamilombe — albeit some indicative data has been collected throughout the various surveys conducted, presented in this chapter.
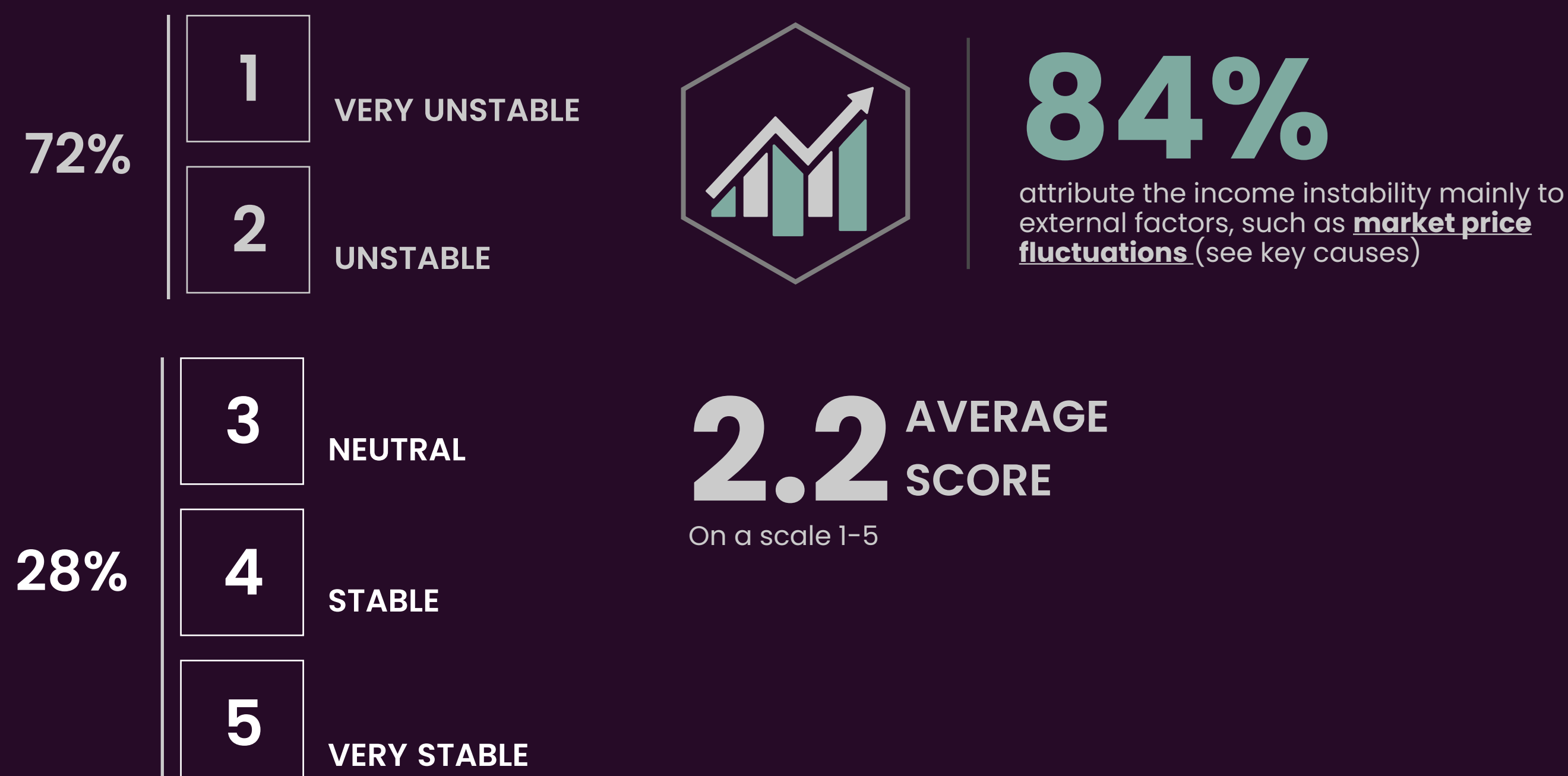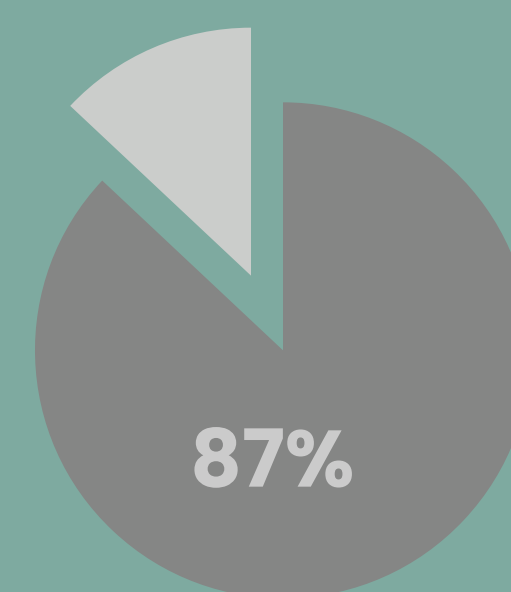
INCOME PROFILE UNDERGROUND WORKERS

In 2023, the majority of respondents (72.2%) reported that their income was inferior to what they expected. A significant portion (45.8%) mentioned that their income was variable or changing, while only 2.7% reported earning identical income to what they expected, and 11.1% earned superior income. By 2024, there is a slight increase in respondents reporting identical income (11.2%) and those experiencing variable income (48.3%), while the percentage of respondents reporting inferior income decreased to 43.8%. The consistency in superior income respondents (9.0%) suggests stable conditions for a small group, while the rise in variable income indicates increasing income instability. Furthermore, in 2023, the vast majority of workers (93.7%) reported earning income irregularly, with only a small fraction (6.3%) having regular income. In 2024, there is a slight improvement with a reduction in households reporting irregular income (87.0%) and an increase in those with regular income (13.0%). This indicates a modest trend towards more consistent income streams, although irregular income still predominates, suggesting ongoing economic instability for most households.

STABILITY OF INCOME FROM ASM COBALT ACTIVITIES, ranked

72%

| 1 | VERY UNSTABLE |
| 2 | UNSTABLE |

28%

3	NEUTRAL
4	STABLE
5	VERY STABLE

84%
attribute the income instability mainly to external factors, such as **market price fluctuations** (see key causes)

2.2 AVERAGE SCORE
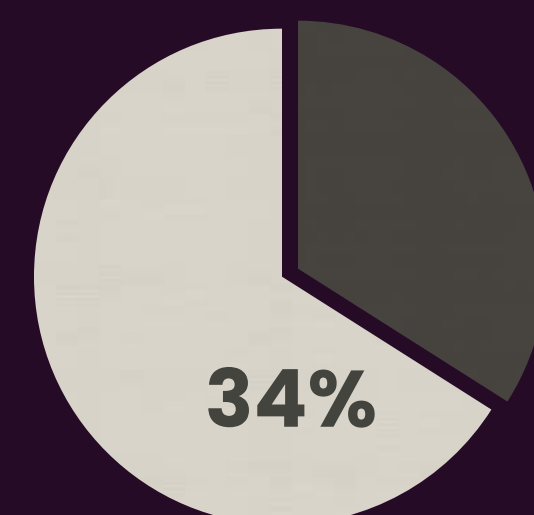On a scale 1–5

KEY CAUSES OF FINANCIAL INSTABILITY

87%

Fluctuating Market Prices
- Yes
- No

Falling cobalt prices[1] directly impact miners' earnings, making it harder for them to meet household needs. Many report that their income is now insufficient to cover basic expenses due to price instability and rising living costs. Additionally, low and unstable production further compounds the financial challenges, as miners' income is closely tied to output levels.

[1] The 2023 Baseline Income Analysis was conducted in the backwaters of a global cobalt price drop (50% drop from approx. USD 50,000 /mT to USD 25,000/mT). This severely impacted the income generation of artisanal cobalt workers in Kolwezi, including the sample under analysis here. The data presented under the 2023 Baseline Income Analysis and the 2024 Follow-Up Survey are therefore skewed from "normal" conditions of income generation from ASM cobalt.

34%

Lack of Access to Credit
- Yes
- No

14%
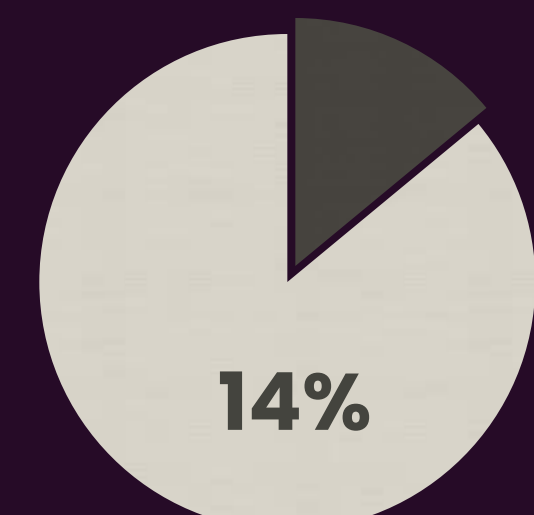
Regulatory Problems
- Yes
- No

7%

Security Problems
- Yes
- No

THE IMPACT FACILITY
Annual Survey of The Fair Cobalt Alliance, 2023/2024
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INCOME CALCULATIONS

MEDIAN INCOME, INCLUDING ZERO VALUE*

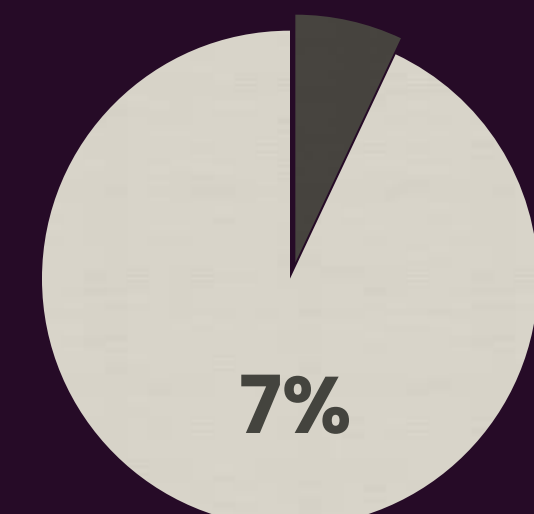| 2023	2024
CDF 4.286 PER DAY	CDF 11.285 PER DAY
≈ USD ($) 2,06	≈ USD ($) 4,18
CDF 30.000 PER WEEK	CDF 79.000 PER WEEK
≈ USD ($) 14,40	≈ USD ($) 29,26
CDF 130.357 PER MONTH	CDF 343.273 PER MONTH
≈ USD ($) 62,57	≈ USD ($) 127,14

TIMESTAMP 02/24. 1 USD ≈ 2000 CDF   TIMESTAMP 02/24. 1 USD ≈ 2700 CDF
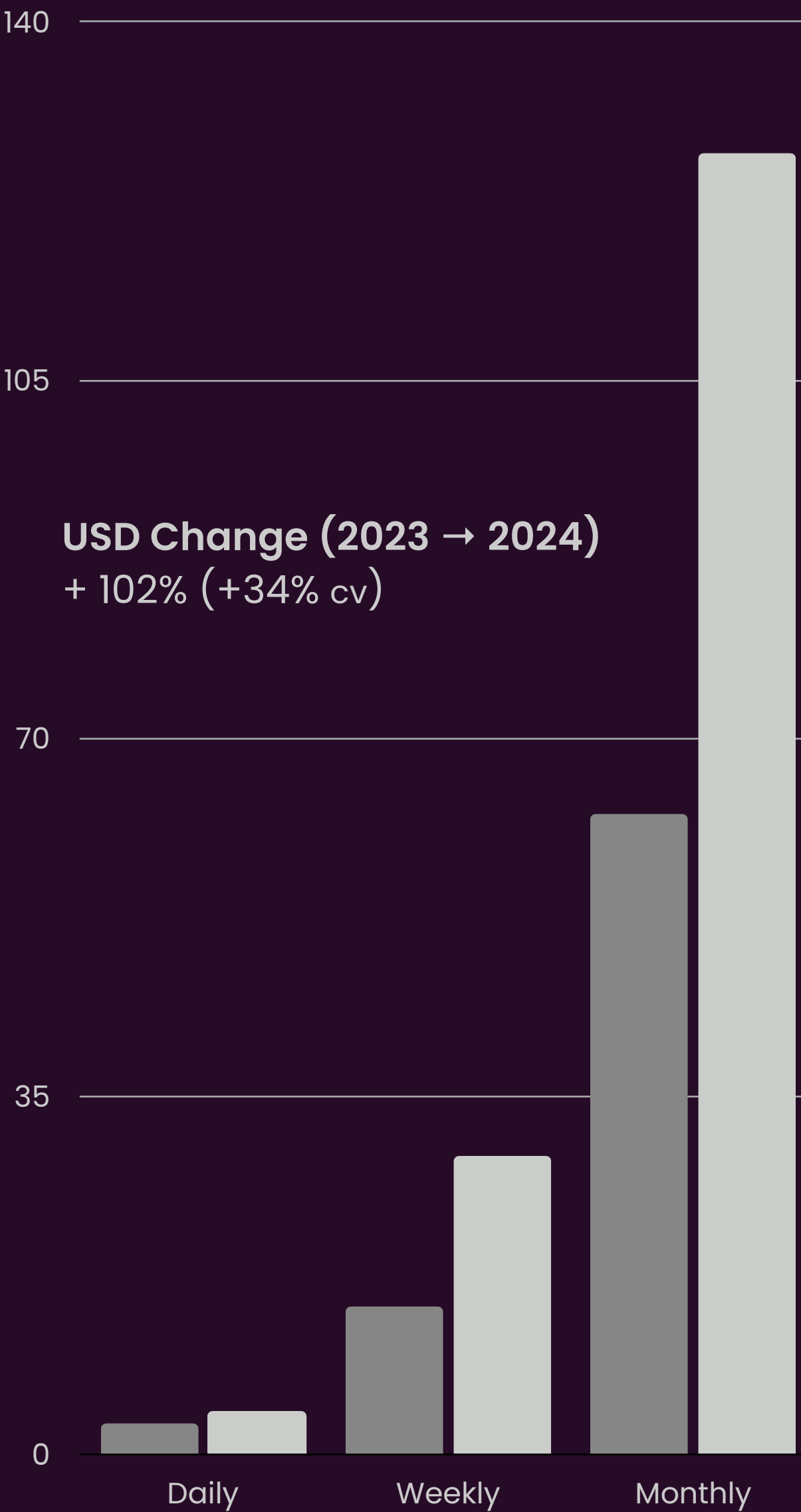
USD Change (2023 → 2024)
+ 102% (+34% cv)

(Bar chart: Daily, Weekly, Monthly)

MEDIAN INCOME, EXCLUDING ZERO VALUE

2023	2024
CDF 7.142 PER DAY	CDF 12.857 PER DAY
≈ USD ($) 3,57	≈ USD ($) 4,76
CDF 50.000 PER WEEK	CDF 90.000 PER WEEK
≈ USD ($) 25,00	≈ USD ($) 33,33
CDF 200.000 PER MONTH	CDF 360.000 PER MONTH
≈ USD ($) 100,00	≈ USD ($) 133,00

TIMESTAMP 02/24. 1 USD ≈ 2000 CDF   TIMESTAMP 02/24. 1 USD ≈ 2700 CDF

PROPORTION OF SAMPLE EARNING 0 [ZERO]

2023 — 21% — Earning 0 / Earning

2024 — 8% — Earning 0 / Earning

REGULARITY OF INCOME

2024 — 87% — Irregular Income / Regular Income

COMMENTARY: CONSIDERING EXCHANGE RATE DEPRECIATION AND INFLATION

In 2023, the daily income of CDF 4,286 was equivalent to USD 2.06. Adjusting for inflation of ~ 19.9%, the real value drops to about USD 1.72 (per day). In 2024, even with a higher income of CDF 11,285 (USD 4.18), a ~ 21% inflation reduce real purchasing power to approximately USD 3.45 (per day). This means that, despite a nominal increase, the ability to purchase goods and services has not improved as significantly, impacting workers' capacity to meet their basic needs.

*INCLUDING & EXCLUDING 0 VALUE

Including zero values (left) represents the entire sample, highlighting the broader income distribution, including those with no earnings. Excluding zero values (right) focuses solely on those who earned an income, providing a clearer picture of the earnings among active earners.

INTERVALS

2023 Interval (Weekly)	2024 Interval (Weekly)
Minimum Reported Income	**Minimum Reported Income**
0 CDF (0 USD)	0 CDF (0 USD)
Maximum Reported Income	**Maximum Reported Income**
1.200.000 CDF (~600 USD)	900.000 CDF (~333 USD)

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→ Presentation of Findings/Underground Workers

THE IMPACT FACILITY

Margin of Error is (+−) 3.39% between weeks for all reported data averages.

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INCOME & HOUSEHOLD GOODS

ACCESS TO FINANCE & SAVINGS

In 2024, the Fair Cobalt Alliance launched a new project seeking to make financial services more accessible to workers — including digitising trade transactions, to tackle corruption in the local cobalt trade chain. New for the 2024 survey was therefore a set of queries verifying assumptions regarding the broader financial access of workers currently, including how many utilise basic bank services such as bank accounts.

SAVINGS
55% of the respondents indicated that they are able to save some portion of their income from cobalt mining. This suggests that more than half of the workers have some level of financial resilience and the ability to set aside money for future needs or emergencies. However, 44% of the respondents reported that they do not save any money from their cobalt mining earnings. This indicates that a substantial proportion of the workers are likely living day-to-day, with little to no financial buffer to fall back on in times of need.

BANK ACCOUNT OWNERSHIP
The majority of underground workers do not possess a bank account, with 98% indicating they lack one. This suggests significant barriers to accessing traditional financial services.

LOAN AND CREDIT ACCESSIBILITY
Only one-fifth (20%) of the workers have accessed loans or credit, reflecting a limited interaction with financial lending services. Among the few who have accessed loans, the vast majority (95%) have relied on informal sources rather than bank loans, with only 5% using bank loans.

ACCESSIBILITY OF FINANCIAL SERVICES
A significant portion of respondents (52%) perceive financial services as either quite inaccessible (24%) or very inaccessible (28%).

SAVINGS

55%
ARE SAVING OR INVESTING THEIR INCOME

BANK ACCOUNT OWNERSHIP

98%
DO **NOT** HAVE A BANK ACCOUNT

LOAN AND CREDIT ACCESSIBILITY

80%
HAVE **NEVER** ACCESSED FINANCIAL SERVICES

95%
OF THE 20% THAT HAVE ACCESSED FINANCIAL SERVICES RELIED ON **INFORMAL SOURCES**

ACCESSIBILITY OF FINANCIAL SERVICES

52%
BELIEVE THAT FORMAL FINANCIAL SERVICES ARE **INACCESSIBLE**

INCOME
& HOUSEHOLD GOODS

HOUSEHOLD GOODS AND EXPENDITURES

Household goods are a useful complement to understanding the financial situation of workers, as they provide a indicative picture of living standards and spending priorities. While income data outline what workers earn, information on household goods can highlight how resources are managed to meet daily needs. This helps identify whether earnings are sufficient for maintaining basic living conditions, offering a more practical view of workers' economic well-being.

Some key takeaways were these:
- High tenancy rate: A significant majority of respondents (74%) are tenants, indicating a high reliance on rental housing. Only 23% of the workers own their homes, which reflects limited asset ownership and long-term financial stability.
- Limited ownership of vehicles: Ownership of motor vehicles is quite low among respondents, with only 14% owning a motorbike, 4% owning a car, and 2% owning a truck.
- While a good proportion of respondents own basic household goods such as radios (87%) and televisions (67%), fewer have access to more substantial assets like fridges/freezers (19%) and satellite dishes (32%). Ownership of basic items like iron is relatively balanced (54%), but only 12% own a mattress, highlighting disparities in living conditions.

Main expenses:
- High education expenses: 59% of underground workers spend on education, mainly through school fees for dependants.
- Moderate health care costs: Nearly half (48%) of underground workers incur health care expenses.
- Equipment and tools: 42% spent on equipment and tools, showing a considerable investment in work-related necessities.

Limited alternative income: 74% of underground workers report having no other sources of income, relying heavily on their earnings from digging. 13% of underground workers engage in small-scale trade, indicating a minor diversification of income sources. Only 4% of underground workers have additional income from agriculture, showing limited engagement in farming activities.

HOUSING

74% RELY ON RENTAL HOUSING

MAIN EXPENSES

59%
EDUCATION
IS THE BIGGEST EXPENSE TYPE

48%
HEALTH CARE
IS THE 2ND BIGGEST EXPENSE TYPE

42%
EQUIPMENT / TOOLS
IS THE 3RD BIGGEST EXPENSE TYPE

DEPENDENCY ON MINING

74%
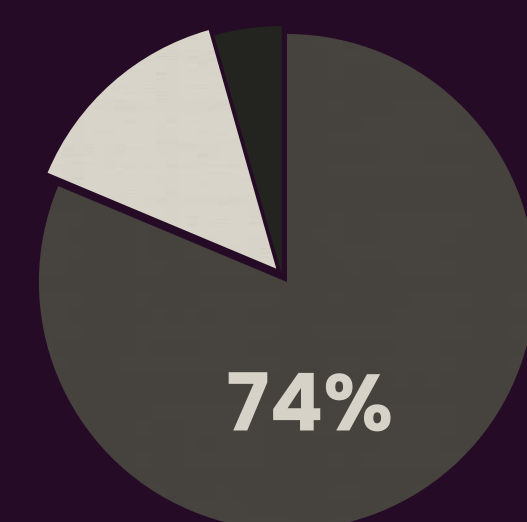
Main Income Source
- Digging
- Small-Scale Trade
- Agriculture

Presentation of Findings

Demographics & Professional Experience

Occupational Health, Safety & Hygiene

Child Labour

Stakeholder and NGO Perceptions

Household Goods & Income

SECTION TWO
WASHERS

Gender Representation: Female (100%) • 2023 Sample Size: 19 • 2024 Sample Size: 100
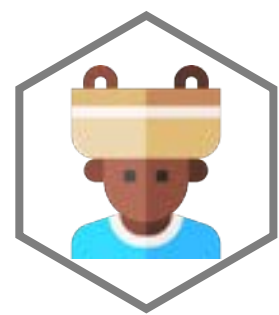
DEMOGRAPHICS
& PROFESSIONAL EXPERIENCE

The collected term "washers" represents a female occupation at Kamilombe and more broadly within the artisanal and small-scale mining (ASM) cobalt sector. The washers have a median age of 35 years (29% between 26-35 years old and 33% between 36 and 45 years old), similar to both the underground workers and community members. However, their educational attainment differs, with 63% having only completed primary school. A significant portion, 44%, of the washers originate from provinces outside Greater Katanga, a noteworthy deviation from the other groups. Like the male workers, their primary reasons for changing addresses were related to seeking employment or, as it was referred to as multiple times: survival, with their main motivation for working as washers being financial necessity.

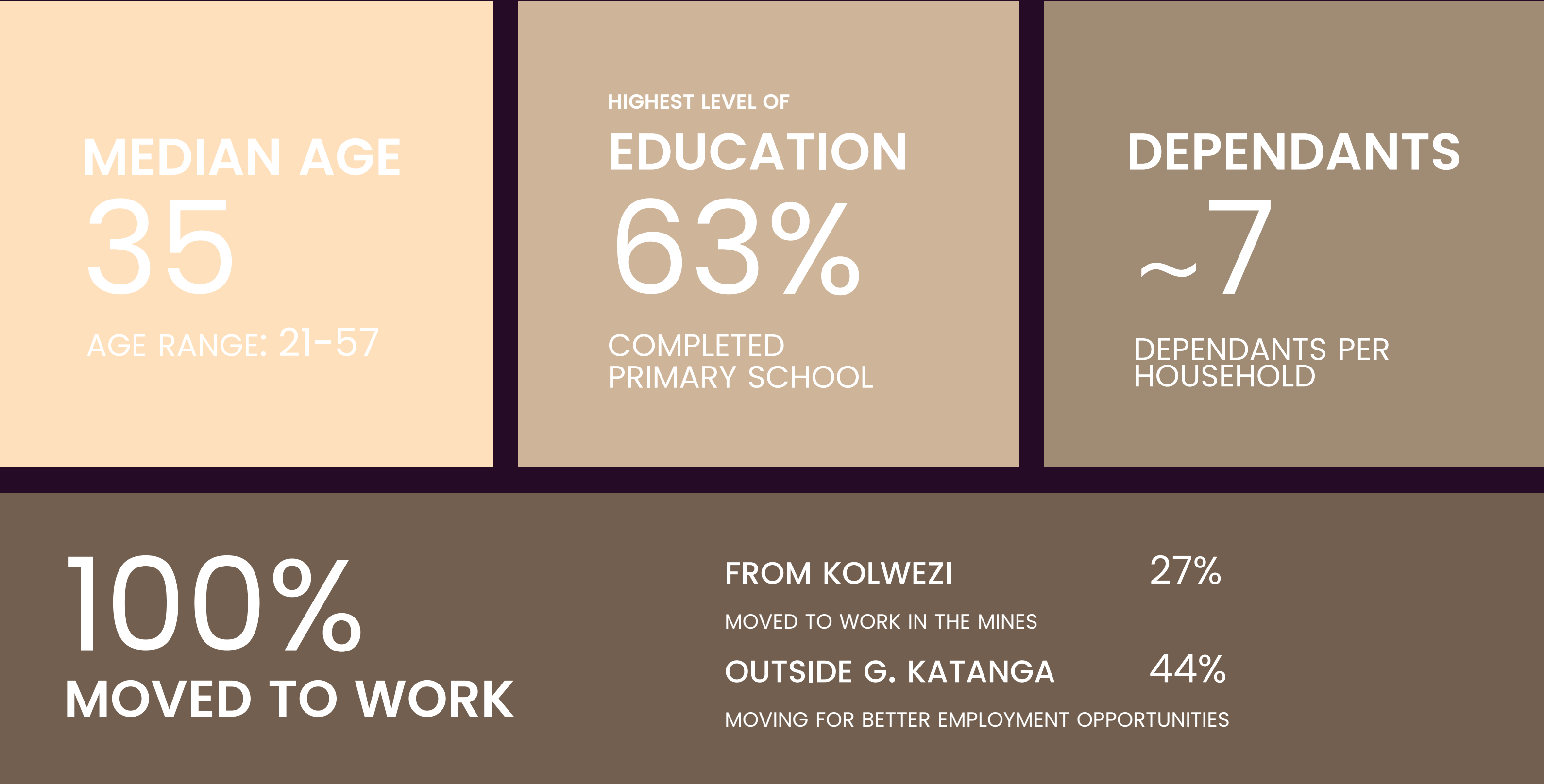The median duration of employment in washing is five (5) years, with the most common tenure being one year (13.13% of the total sample) and the longest being 25 years. In terms of where the respondents worked prior to entering mining / washing, the findings are relatively varied — and without any major trends:

- **Small business:** The most common previous occupation was running a small business, which represents approximately 25.25% of the total respondents.
- **Housekeeper:** The second most common occupation was working as a housekeeper, accounting for about 22.22% of the respondents.
- **Never worked before:** The third most common category was individuals who had never worked before, making up around 20.20% of the respondents.

The top three reasons for entering mining among washers are 1) looking for an income (82.83%) 2) lack of alternative employment/work (7.07%) and 3) to work with their husband, who is an underground worker (6.06%).

KEY DEMOGRAPHICS

MEDIAN AGE
35
AGE RANGE: 21-57

HIGHEST LEVEL OF
EDUCATION
63%
COMPLETED
PRIMARY SCHOOL

DEPENDANTS
~7
DEPENDANTS PER
HOUSEHOLD

100%
MOVED TO WORK

FROM KOLWEZI   27%
MOVED TO WORK IN THE MINES

OUTSIDE G. KATANGA   44%
MOVING FOR BETTER EMPLOYMENT OPPORTUNITIES

PROFESSIONAL EXPERIENCE

AVERAGE
of **5**
YEARS OF
MINING EXPERIENCE

REASONS FOR MINING

LOOKING FOR AN INCOME   83%

UNEMPLOYMENT/NO OTHER WORK   7%

TO WORK WITH THEIR HUSBAND   6%

PERCEPTION OF SAFETY

100%
FEEL SAFE AT WORK

PPE USAGE

99%
USE BOOTS WHILE WASHING

RENT-A-BOOT SYSTEM

2023 — **61%**

2024 — **13%**

● Renting Boots
○ Owning Boots

100% SATISFACTION RATE
FOR RENT-A-BOOT SYSTEM

RISK ANALYSIS, BY MOST SIGNIFICANT PERCEIVED RISK

50%	VAGINAL INFECTION
27%	PIMPLES/SKIN PROBLEMS
3%	CHOLERA
1%	VARICELLA

OCCUPATIONAL
HEALTH SAFETY & HYGIENE

PERCEPTION OF SAFETY AND PPE USAGE

A total of 100% of washers note that they feel safe working at Kamilombe. Notwithstanding, multiple risks were identified by the sample. These risks were mostly related to health risks of not using boots when washing the ore — something that 99% of the sample noted is a central best practice (using boots) with 99% of the sample in 2024 using it daily.

Through the Fair Cobalt Alliance's Rent-A-Boot system, washers get access to quality protective gear for their work. Of all the washers that has accessed the system, 100% noted it has been useful for them and their work. What is more, the shift between renting (61% in 2023) to purchasing/owning (87% in 2024) indicates more beneficiaries are both able, and willing to make boot usage consistent.

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→ Presentation of Findings/Washers

THE
IMPACT
FACILITY

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OCCUPATIONAL
HEALTH SAFETY & HYGIENE

HYGIENE & HEALTH CARE

INCREASE IN SITE CLEANLINESS PERCEPTION
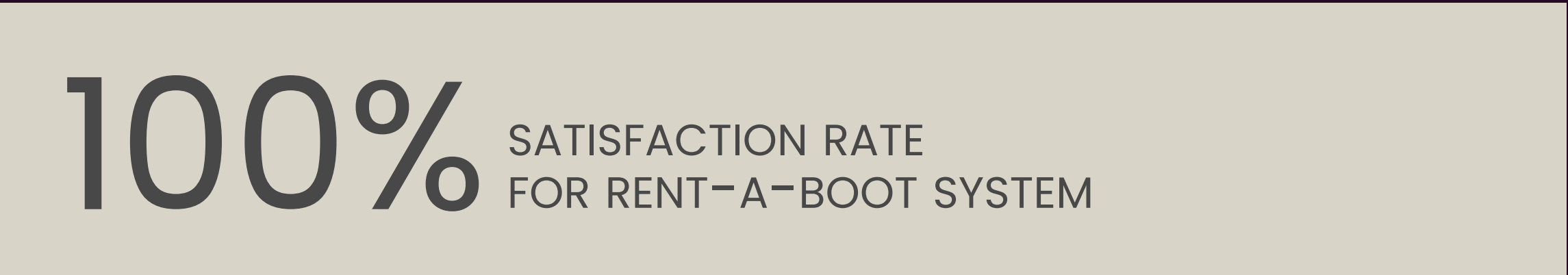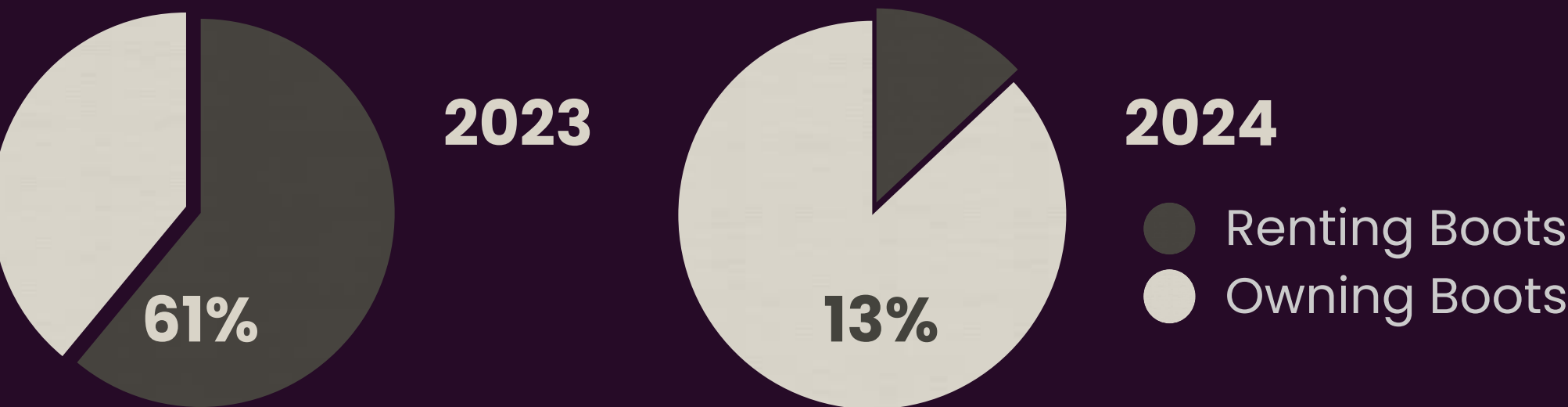Washers' perception of site cleanliness increased from 84.21% in 2023 to 96.97% in 2024, indicating better hygiene conditions compared to the perceptions of underground workers.

GROWING CONCERN ABOUT SANITARY FACILITIES
There was a substantial increase in the percentage of washers reporting toilet problems, from 25% in 2023 to 80.81% in 2024. This indicates a growing awareness and concern about the adequacy and conditions of toilet facilities over the years.

RECOMMENDATIONS FOR IMPROVING CLEANLINESS
Washers proposed various measures to address hygiene issues. The most frequently mentioned solutions include building toilets (28.57%), raising awareness of sanitary use of toilets (28.57%), and maintenance of toilets (14.29%). Additionally, 40.43% suggested adding more toilets, and 27.66% emphasised raising awareness about proper toilet use.

WORKSPACE HYGIENE AND SANITATION

84%
FOUND THAT THEIR WORKSPACE WAS CLEAN AND HYGIENIC AT BASELINE

80%
FOUND THAT THERE ARE SERIOUS TOILET ISSUES AT THE WORKSPACE

40%
WANTS ADDITIONAL TOILETS ON SITE

HEALTH CARE

99%
ARE COVERED BY THE COOPERATIVE

84%
GET COVERAGE FOR ALL ILLNESSES

89%
DO NOT GET COVERAGE FOR DEPENDANTS

CHILD LABOUR

The Fair Cobalt Alliance complements its understanding of the context and experiences of child labour data by collecting annual perceptions and experiences related to child labour directly from the workers at Kamilombe and the community of Kapata, building on the robust data collected by its partners, The Centre and Save the Children. This additional data serves as a cross-check to enrich the extensive findings from partners' networks.

In contrast to underground workers, only 8% of the washers note that child labour does not occur at in the community. 58% note it is rare, and 34% note that it is either quite common or very common. No women washer believe there is any reason for a child to work in the mine, though 82% indicated that lack of educational alternatives is the main driver behind child labour, followed by economic necessity (64%). Should a washer encounter child labour, the most cited action was to "chase the child away" (85%), followed by council him/her (43%) and report the child to the mine police (21%). Only 7% would confront the person employing the child, and only 1% would refer them to remedial structures.

A majority of the workers deem government efforts to combat child labour to be effective (either very effective [14%], effective [50%] or fairly effective [29%]) at a total of 93%. A total of 7% of the sample deem the government efforts to be ineffective. Furthermore, only 8% know about local initiatives at Kamilombe that aim to prevent and/or combat child labour in the mines. This data provides valuable insights as the gap between workers viewing government efforts as effective while having low awareness of specific child labour programs could be due to a lack of direct communication or visibility of these initiatives at the community level. Programs may exist but are poorly publicised or implemented in a way that does not engage or inform the workers on mine sites effectively. This disconnect implies that, as an organisation working in partnership to provide child labour remediation program, our work should prioritise not only implementing child labour prevention and remediation programs but also ensuring that these are socialised within the local communities.

EXTENT OF CHILD LABOUR

58%
NOTED THAT CHILD LABOUR IS RARE, BUT STILL OCCURS IN THE COMMUNITY

34%
NOTED THAT CHILD LABOUR IS COMMON*

*no geographical location identified

82% note lack of educational opportunities as the main cause

REMEDIATION EFFORTS

93%
BELIEVE THAT GOVERNMENT EFFORTS TO COMBAT CHILD LABOUR ARE EFFECTIVE

92%
DO NOT KNOW OF ANY OTHER LOCAL INITIATIVES

PERCEIVED MINIMUM AGE

18 years old
IS NOTED AS THE MINIMUM AGE FOR WORK IN THE MINES

0%
SUPPORT ANYONE BELOW 18 TO WORK IN THE MINES

37% NOTED 20 YEARS+

85% WOULD "CHASE THE CHILD AWAY" AS PREDOMINANT ACTION AGAINST CHILDREN WORKING

COOPERATIVE AND NGO PERCEPTIONS

The data from 2023 and 2024 demonstrate positive trends in how washer women perceive their engagement with the cooperative, particularly in areas of consideration, listening, and responsiveness. However, there are areas requiring further attention, such as the extension of medical coverage to dependents and maintaining awareness of the Fair Cobalt Alliance. The significant increase in the cooperative's role in providing medical care and the broadening of health coverage are notable improvements.

PERCEPTION OF THE COOPERATIVE

+1.26%
Increase since 2023

96%
FEEL CONSIDERED BY THE COOPERATIVE

0%
change since 2023

100%
FEEL REPRESENTED BY THE COOPERATIVE

STATEMENT 1: YOU PERCEIVE THAT THE COOPERATIVE LISTENS TO YOU

100% AGREED

STATEMENT 2: YOU PERCEIVE THAT THE COOPERATIVE RESPONDS TO YOUR GRIEVANCES

98% AGREED

STATEMENT 3: YOU PERCEIVE THAT THE COOPERATIVE INVOLVES YOU IN DECISION-MAKING

80% AGREED

AWARENESS OF THE FAIR COBALT ALLIANCE

2023 **10%**

2024 **10%**

CHANGE BY **0%**

INCOME PROFILE WASHERS

The below refers to qualitative data, where each respondent was asked to self-assess their financial situation. Notably, only 35% of respondents noted that what they earn from cobalt-related activities (in this case washing) was enough to cover basic household needs — and only 25% noted that their financial situation is stable. However, when asked to rank their financial situation — 58% noted that their financial situation is stable, reflecting the group below that noted it sufficient for household needs and relative financial stability, albeit with recurring challenges and difficulties.

40% REPORTED HAVING CHALLENGES AND DIFFICULTIES

A considerable proportion of respondents reported facing financial difficulties. They mentioned challenges such as instability due to weather conditions, difficulties paying for healthcare and school fees, and overall financial instability.

35% REPORTED INCOME AS SUFFICIENT FOR THEIR HOUSEHOLD NEEDS

Many respondents indicated that their earnings are sufficient to meet their basic household needs. They mentioned that what they earn is enough for their needs, including food, rent, and education.

25% REPORTED FINANCIAL STABILITY

A relative number of respondents described their financial situation as stable. They are able to pay for essential expenses such as education, transportation, medical care, and clothing.

KEY CAUSES OF FINANCIAL INSTABILITY
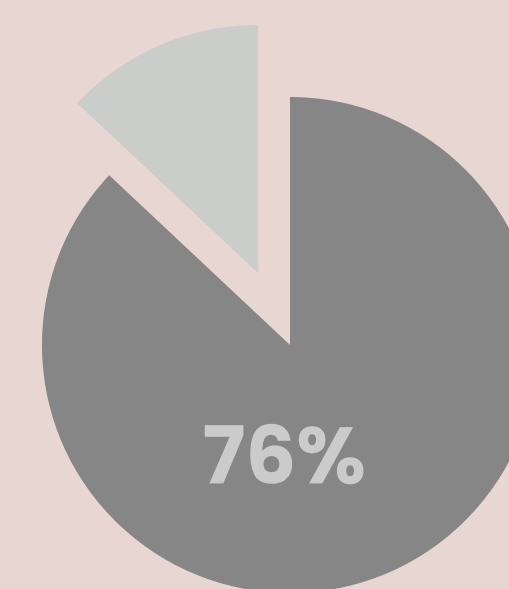
Fluctuating Market Prices
76%
● Yes
● No

Falling cobalt prices[1] directly impact washers' earnings (as with underground workers), making it harder for them to meet household needs. Many report that their income is now insufficient to cover basic expenses due to price instability and rising living costs. Additionally, low and unstable production further compounds the financial challenges, as washers' income is dependent on output levels.

[1] The 2023 Baseline Income Analysis was conducted in the backwaters of a global cobalt price drop (50% drop from approx. USD 50,000 /mT to USD 25,000/mT). This severely impacted the income generation of artisanal cobalt workers in Kolwezi, including the sample under analysis here. The data presented under the 2023 Baseline Income Analysis and the 2024 Follow-Up Survey are therefore skewed from "normal" conditions of income generation from ASM cobalt.
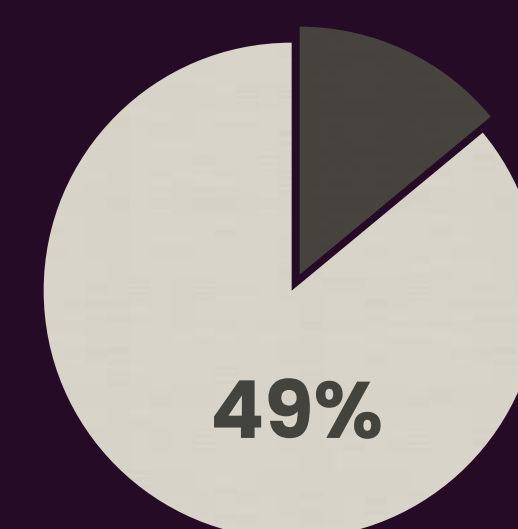
Regulatory Problems
49%
● Yes
● No
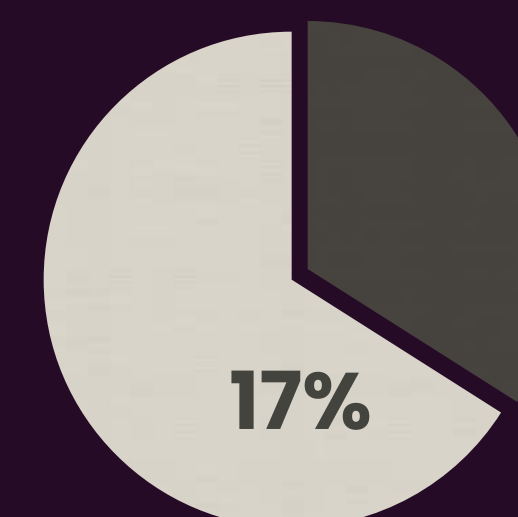
Lack of Access to Credit
17%
● Yes
● No
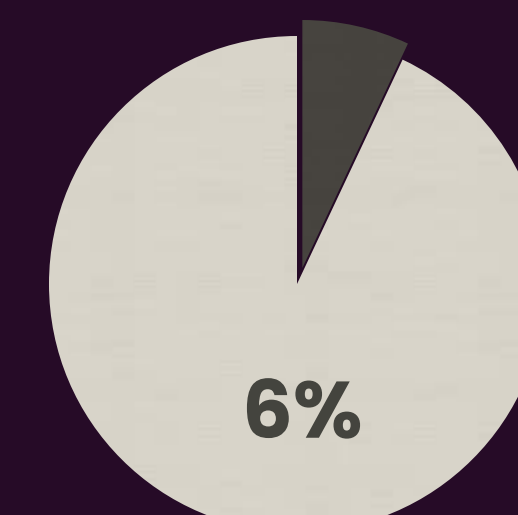
Security Problems
6%
● Yes
● No

INCOME CALCULATIONS

MEDIAN BAGS WASHED PER DAY PER PERSON*

2023	2024
3 BAGS WASHED PER DAY	**2** BAGS WASHED PER DAY

MEDIAN PAYMENT PER WASHED BAG

2023	2024
CDF 1.500 PER BAG	CDF 4.000 PER BAG
≈ USD ($) 0.75	≈ USD ($) 1.48

MEDIAN DAILY EARNINGS FROM WASHING

CDF 4.500 PER DAY	CDF 8.000 PER DAY
≈ USD ($) 2.25	≈ USD ($) 2.96

TIMESTAMP 02/24. 1 USD ≈ 2000 CDF   TIMESTAMP 02/24. 1 USD ≈ 2700 CDF

MEDIAN INCOME, COMPILED

CDF 4.500 PER DAY	CDF 8.000 PER DAY
≈ USD ($) 2,25	≈ USD ($) 2,96
CDF 22.500 PER WEEK	CDF 40.000 PER WEEK
≈ USD ($) 11,25	≈ USD ($) 14,81
CDF 90.000 PER MONTH	CDF 160.000 PER MONTH
≈ USD ($) 45	≈ USD ($) 59

TIMESTAMP 02/24. 1 USD ≈ 2000 CDF   TIMESTAMP 02/24. 1 USD ≈ 2700 CDF

USD Change (2023 → 2024)
+ 31.6% (+13.6% cv)

(bar chart: Daily, Weekly, Monthly; y-axis 0, 15, 30, 45, 60)

MAIN EXPENSES

86% EDUCATION IS THE BIGGEST EXPENSE TYPE

68% HEALTH CARE IS THE 2ND BIGGEST EXPENSE TYPE

48% TRANSPORT IS THE 3RD BIGGEST EXPENSE TYPE

DEPENDENCY ON MINING

69%

Main Income Source
- Washing
- Digging
- Other

COMMENTARY: CONSIDERING EXCHANGE RATE DEPRECIATION AND INFLATION

In 2023, the daily income of CDF 4,286 was equivalent to USD 2.06. Adjusting for inflation of approximately 19.9%, the real value drops to about USD 1.72 (per day). In 2024, even with a higher income of CDF 8,000 (USD 2.96), a 21% inflation rate reduces real purchasing power to approximately USD 2.34 (per day). This means that, despite a nominal increase, the ability to purchase goods and services has not improved as significantly, impacting workers' capacity to meet their basic needs.

*WASHING IN GROUPS V. INDIVIDUALLY

Washers either wash in groups or by themselves. To triangulate data, we collected key information about both types. The findings suggested that women that wash in groups, versus those who wash individually, earn the same in daily earnings.

THE IMPACT FACILITY
Annual Survey of The Fair Cobalt Alliance, 2023/2024
→ Presentation of Findings/Washers

Margin of Error is (+−) 3.39% between weeks for all reported data averages.

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INCOME
& HOUSEHOLD GOODS

ACCESS TO FINANCE & SAVINGS

In terms of savings, a significant majority (87.63%) of washers report that their households save or invest a portion of their income generated from cobalt mining. The most common areas of investment include education (45.36%) and healthcare (35.05%), highlighting the priority given to long-term family well-being a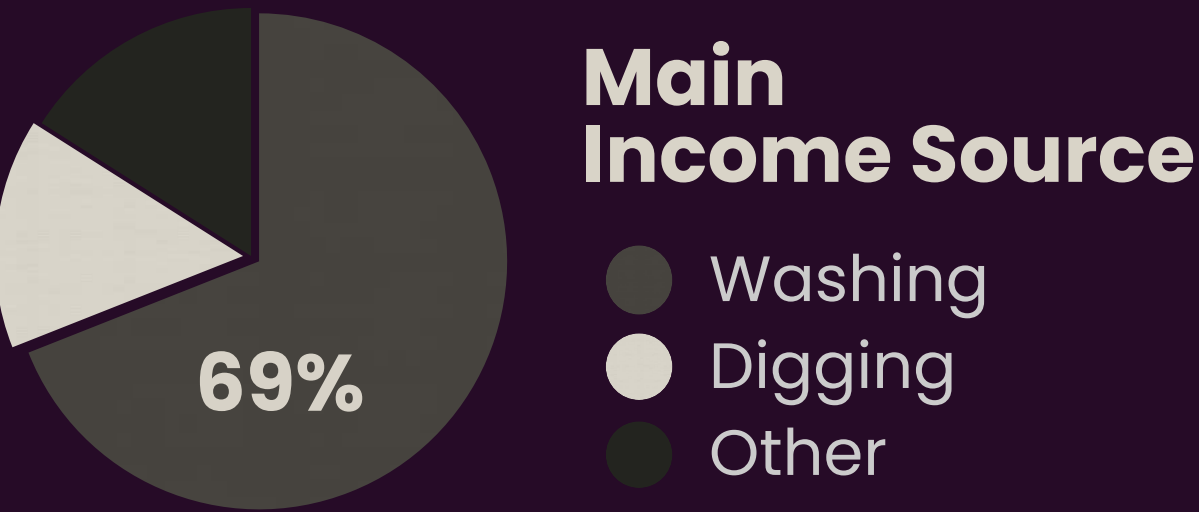nd health. Despite this, traditional financial instruments like savings accounts are underutilised, with only 7.22% of respondents using them. Instead, a variety of informal savings and investment methods are prevalent. The most frequently mentioned method is "épargne informel" (informal savings), used by 31% of respondents. This method includes savings kept in various forms at home or through community-based systems like "la tontine" (rotating savings and credit associations), used by 10% of respondents.

These informal systems reflect the community's reliance on non-institutional means to secure and grow their financial resources. Additionally, some respondents mentioned unique methods such as saving in a suitcase, using mobile money accounts like Airtel and Orange Money, and even saving through family members. This diversity in savings strategies illustrates a flexible but fragmented approach to financial management among washers, driven by accessibility and trust in traditional systems over formal banking. In conclusion, while a high proportion of washers save or invest their income, there is a strong preference for informal savings mechanisms. This indicates potential areas for financial inclusion initiatives to provide more secure and formalised savings options that can cater to their needs while building trust in formal financial institutions.

SAVINGS

88%
ARE SAVING OR INVESTING THEIR INCOME

BANK ACCOUNT OWNERSHIP

99%
DO **NOT** HAVE A BANK ACCOUNT

LOAN AND CREDIT ACCESSIBILITY

54%
HAVE **NEVER** ACCESSED FINANCIAL SERVICES

98%
OF THE 46% THAT HAVE ACCESSED FINANCIAL SERVICES RELIED ON **INFORMAL SOURCES**

ACCESSIBILITY OF FINANCIAL SERVICES

45%
BELIEVE THAT FORMAL FINANCIAL SERVICES ARE **INACCESSIBLE**

Presentation of Findings

Demographics & Community Perception of ASM

Child Labour

Community Savings, Entrepreneurship and Income

SECTION THREE
KAPATA COMMUNITY

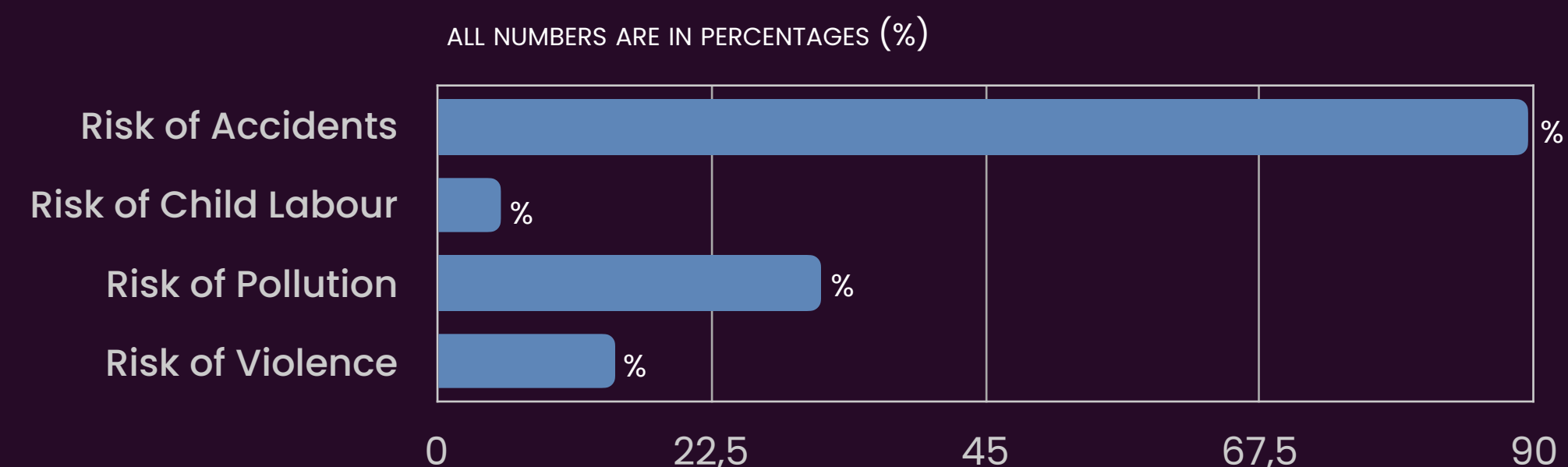Gender Representation: Male (45%) Female (55%)• 2023 Sample Size: 95 • 2024 Sample Size: 100

PERCEIVED RISKS ASSOCIATED WITH COMMUNITY-ADJACENT ASM ACTIVITIES BASELINE (2023) DATA

ALL NUMBERS ARE IN PERCENTAGES (%)

90%
NOTED
"YES, THERE ARE RISKS"

- Risk of Accidents %
- Risk of Child Labour %
- Risk of Pollution %
- Risk of Violence %

0   22,5   45   67,5   90

PERCEIVED IMPACT OF ASM ON THE COMMUNITY

POSITIVE IMPACT   **NEGATIVE** IMPACT

41%   72%   59%   28%

+31%

POSITIVE **AND**
NEGATIVE IMPACT

The biggest part of the sample believed that there are only positive impacts of ASM on the community (41%), whereas 28% believes there are only negative impacts. An additional 31% believes there are both positive and negative impacts.
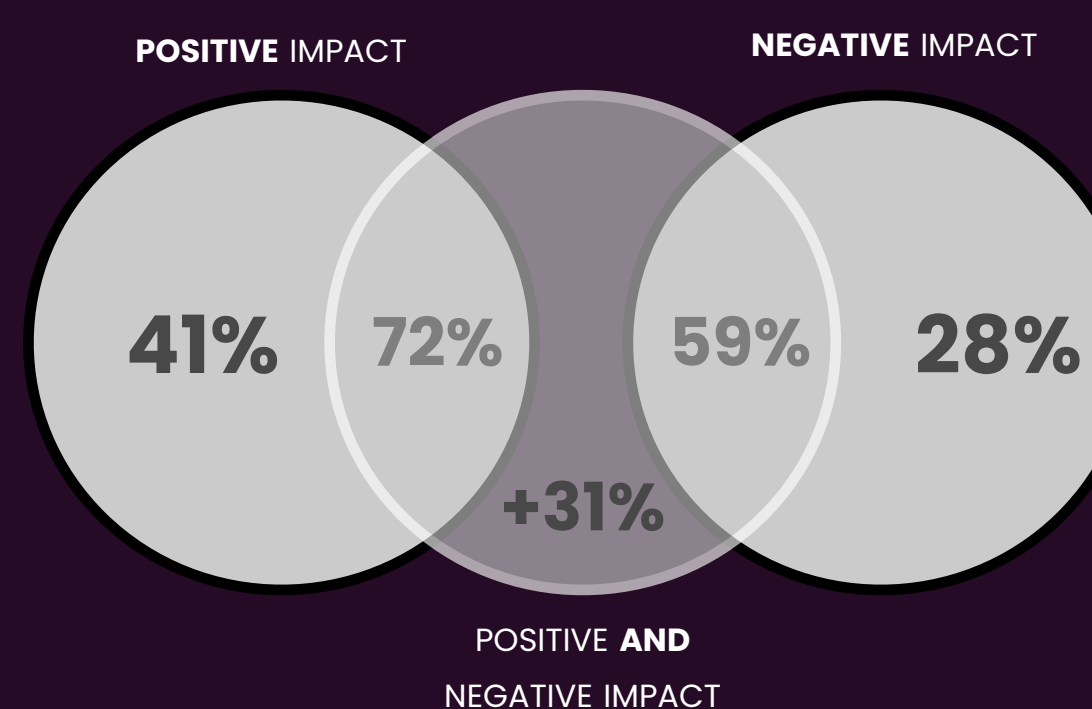
DEMOGRAPHICS & COMMUNITY PERCEPTION OF ASM

The sample of community members consisted of 55 female respondents and 45 male respondents. Out of the 45 male respondents, 55.56% worked in the mines (not limited to Kamilombe) and out of the entire sample 28% had other household members working in the mines. The community members sampled in and around Kamilombe exhibit a wide age range from 18 to 80 years old, with a median age of 33 years. Their educational attainment is consistent with national trends, with 40% having completed secondary school, and a significant share (in contrast to underground workers and washers), 33.6%, holding a high school diploma.

Similar to the underground workers, the majority of community members, 58.6%, originally came from different neighbourhoods within Kolwezi. The main reasons for relocating included searching for a home or building a house and seeking employment. The prevalent demographic of the head of household among community members is male, with a protestant religious affiliation. The median age of these household heads is 34 years, with their main occupations being mine company agents and mine workers (creuseurs). Their highest level of education is predominantly a high school diploma. It's important to note that head of household data only represents a subset of the total sample, specifically 49 out of 95 respondents.

POSITIVE IMPACT
74%
BELIEVE ASM CONTRIBUTES ECONOMICALLY

POSITIVE IMPACT
67%
BELIEVE ASM REDUCES UNEMPLOYMENT

NEGATIVE IMPACT
97%
BELIEVE ASM CAN CAUSE ACCIDENTS AND/OR DEATH

NEGATIVE IMPACT
52%
BELIEVE ASM CAN CAUSE CONTAMINATION AND/OR ILLNESS

ADDITIONAL NEGATIVE IMPACTS
- Children dropping out of school (24%)
- Violence against girls (17%)

CHILD LABOUR

The Fair Cobalt Alliance complements its understanding of the context and experiences of child labour data by collecting annual perceptions and experiences related to child labour directly from the workers at Kamilombe and the community of Kapata, building on the robust data collected by its partners, The Centre and Save the Children. This additional data serves as a cross-check to enrich the extensive findings from partners' networks.

A clear deviation from the underground workers and Washers, a total of 56% of the community sample noted that child labour is either quite or very common in the community. Another 45% know about a child under 18 working in the mines, and 2% had children under 18 working in the mines. 10% noted that there might be a reason for children to work in the mines if that means support the household economically. Similarly, 79% of the sample believed the main driver behind child labour to be economic necessity, followed by lack of educational opportunities (70%) and loss of parents (25%). Should community members encounter child labour, they would choose to counsel the child as the predominant action, followed by chasing the child away (49%) and consult their parents (24%). Only 13% would question the person employing the child, and 14% would report them to the mine police. 9% would do nothing. As with the other samples, a majority deem the government efforts to combat child labour to be effective (57%), and very few knew about other local initiatives (only 11% knew about other initiatives beside the government efforts).

EXTENT OF CHILD LABOUR

2%
HAVE CHILDREN UNDER 18 IN THEIR HOUSEHOLD THAT WORKS IN THE MINES

45%
KNOW OF A CHILD UNDER 18 WORKING IN THE MINES*

*not at Kamilombe

56% note it is quite or very common in the community

REMEDIATION EFFORTS

57%
BELIEVE THAT GOVERNMENT EFFORTS TO COMBAT CHILD LABOUR ARE EFFECTIVE

89%
DO **NOT** KNOW OF ANY OTHER LOCAL INITIATIVES

PERCEIVED MINIMUM AGE

18 years old
IS NOTED AS THE MINIMUM AGE FOR WORK IN THE MINES

10%
SUPPORT CHILDREN BELOW 18 TO WORK IN THE MINES, IF THAT MEANS INCOME

37% NOTED 20 YEARS+

56% WOULD "COUNSEL THE CHILD" AS PREDOMINANT ACTION

Fair Cobalt Alliance
L'Alliance du Cobalt Equitab

COMMUNITY
SAVINGS, ENTREPRENEURSHIP & INCOME

SMALL BUSINESSES/IGAs

34% 2024
OWN A SMALL BUSINESS OR CARRY OUT AN INCOME-GENERATING ACTIVITY (IGA)

1-3 years 2024
IS THE AVERAGE NUMBER OF YEARS RUNNING A BUSINESS

150,000 CDF 2024
IS THE MEDIAN MONTHLY INCOME GENERATED FROM THE SMALL-BUSINESSES

120,000 CDF
WAS THE AVERAGE INCOME GENERATED BEFORE STARTING THE BUSINESS, REPRESENTING AN INCREASE BY:

+25%

FOOD SECURITY

82%
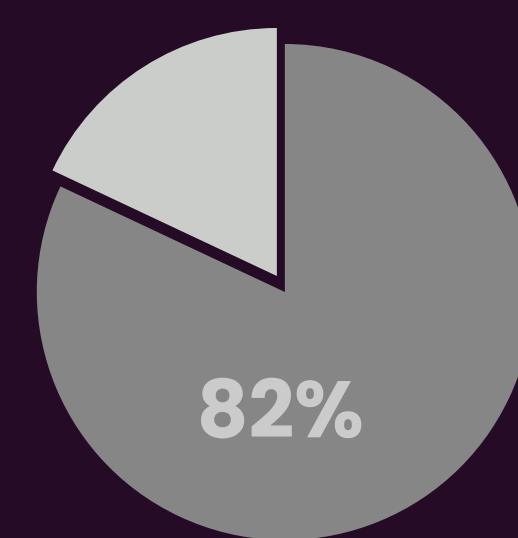
Food Shortages
NOTED THEY HAVE **FOOD SHORTAGES RECURRENTLY**

MOST CITED COPING STRATEGY WAS:
BORROWING MONEY/FOOD TO SUSTAIN THE HOUSEHOLD

SAVINGS & EXPENSES

27% SAVE PORTIONS OF THEIR INCOME MONTHLY

IF YOU WANT TO LEARN MORE HOW THE **FCA WORK WITH COMMUNITY SAVINGS,** PLEASE READ OUR ANNUAL REPORTS, AVAILABLE ON OUR WEBSITE

39% HEALTH CARE
IS THE BIGGEST EXPENSE TYPE

38% EDUCATION
IS THE 2ND BIGGEST EXPENSE TYPE

29% TRANSPORT
IS THE 3RD BIGGEST EXPENSE TYPE

INCOME

CDF **50,000** PER WEEK 2024
≈ USD ($) 18.5

CDF **200,000** PER MONTH 2024
≈ USD ($) 74

23% WORKS WITH **DIGGING**

22% ARE FORMALLY EMPLOYED, **EARNING A WAGE**

10% WORKS FOR **A MINING COMPANY**

7% PERFORMS **SMALL-SCALE TRADE,** SUCH AS FOODS

5% WORKS IN **AGRICULTURE**

SAVINGS & EXPENSES

Overall, while the Kapata community shows substantial ownership of basic household goods like radios and televisions, there is limited ownership of transportation assets and more substantial household goods like fridges/freezers and satellite dishes. High tenancy rates reflect limited home ownership, and there are notable disparities in access to essential items like mattresses and irons.

62% RELY ON RENTAL HOUSING

THE IMPACT FACILITY
Annual Survey of The Fair Cobalt Alliance, 2023/2024
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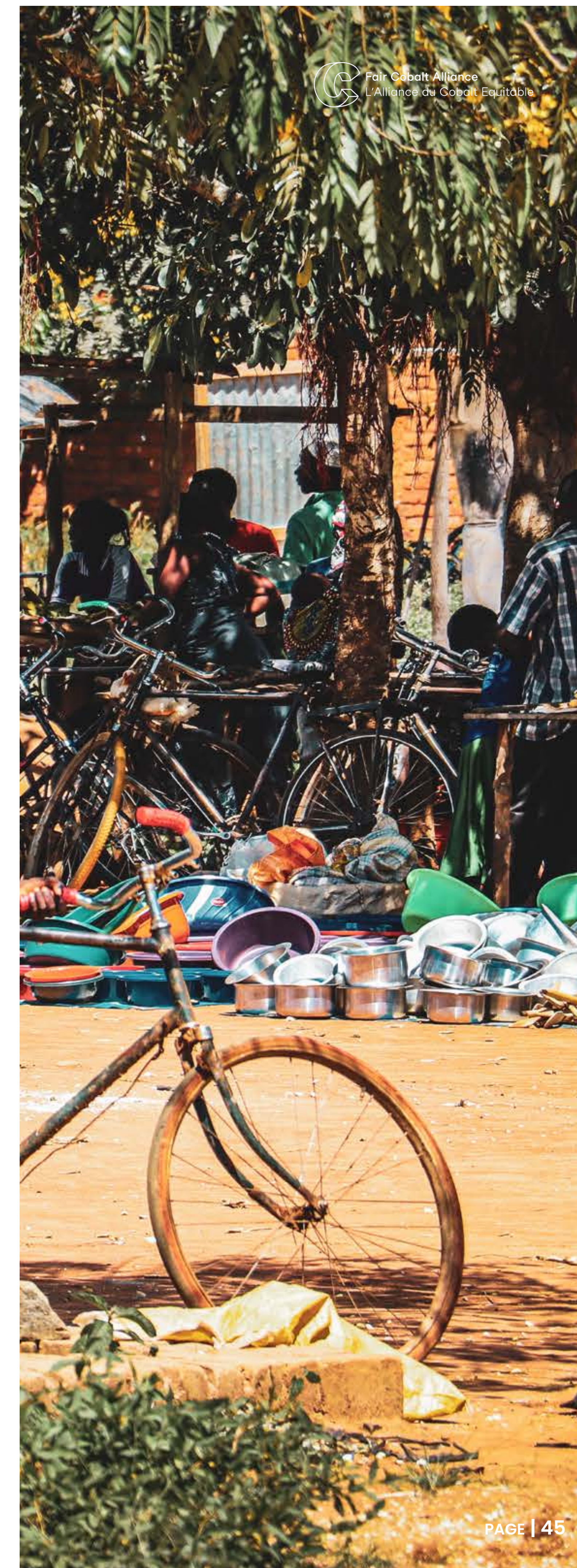
SECTION FOUR
JOINT TAKEAWAYS

DEMOGRAPHIC AND SOCIO—ECONOMIC DRIVERS

A COMMUNITY SHAPED BY ASM COBALT

The Kamilombe mine in Kolwezi and the adjacent community of Kapata, presents a varied demographic and socio-economic landscape encompassing underground workers, washers, and community members. By examining data from these groups collectively, several key insights and comparisons highlight the unique and shared characteristics of this mining community.

Age distribution and workforce maturity

The age distribution across all groups indicates a mature workforce and community. The median age for underground workers is 34 years, for Washers it is 35 years, and for community members, it is 33 years, reflecting a relatively similar age profile. Underground workers range from 21 to 57 years, while community members span a broader range from 18 to 80 years. Washers have an age range similar to underground workers but with a notable concentration in the 26-45 years bracket.

Educational attainment differences

Educational attainment varies notably among the groups. Sixty percent of underground workers have completed secondary school, while 63% of Washers have only completed primary school, highlighting a lower educational attainment compared to their male counter-parts. Among community members, 40% have completed secondary school, and 33.6%

hold a high school diploma. These differences reflect the varied educational backgrounds that influence occupational roles within the mining community.

Geographic mobility and migration Patterns

A high degree of geographic mobility is a common trait across the workforce. Among underground workers, 98.4% are from different neighbourhoods, with the majority coming from Kolwezi (44.79%) and Greater Katanga (33.3%). For washers, 42% originate from provinces outside Greater Katanga, while 58.6% of community members come from different neighbourhoods within Kolwezi. The primary reasons for relocating include employment opportunities and housing needs, demonstrating the economic and social pull of the mining industry.

Socio-economic conditions and dependents

Employment patterns reveal a heavy reliance on the mining sector. Underground workers are primarily engaged in mining operations with few alternative income sources. Washers are mainly involved in washing and processing minerals, with 38% of married washers having husbands working in mines. Socio-economic conditions reflect the challenges and motivations for relocation. The main motivations for moving are related to housing and employment, indicating ongoing

challenges in securing stable and adequate living conditions. The average number of dependents per household varies, with underground workers having around 5.78 dependents and washers having about 7.47 dependents, reflecting the considerable family responsibilities within these groups.

Economic drivers and motivations for mining

The motivations for entering the mining sector at Kamilombe differ slightly between underground workers and washers, although **financial necessity** is a predominant theme. Among underground workers, 34% cited the absence of other work opportunities as their reason for entering mining, 31% were driven by financial incentives, and 26% were attracted by higher wages compared to other jobs.

For washers, the need for money was the overwhelming motivator, with 82.83% driven by financial incentives. Additionally, 7.07% of washers had no other work options, and 6.06% chose to work alongside their husbands, who are diggers. These insights reveal that economic drivers are paramount, with many individuals seeing mining as the most viable way to support themselves and their families.

Age Comparisons

	Median	Range	Most Common
	34	21 - 57	26-35 years / 42%
	35	26 - 45	36-45 years / 33%
	33	18 - 80	

Dependants

5.78

7.47

If there are 5000 workers at the mine site
the number of people depending on mining at Kamilombe would be

~30,000

Economic Drivers

99%
moved looking for work

From outside of Lualaba	59%	40%
Looking for an income	31%	83%	57%
Unemployment	34%	7%	21%

Key Aggregations and Comparisons
Occupational Health and Safety

BUILDING A SAFER WORKPLACE

CONSOLIDATED INSIGHTS INTO SAFETY, HEALTH AND HYGIENE AT KAMILOMBE

Safety perception and risk awareness

The overall perception of safety among workers at Kamilombe has improved. In 2024, 72% of underground workers reported feeling safe, up from 69.79% in 2023. For washers, a remarkable 100% reported feeling safe in both years, underscoring a strong sense of security within this group. Together, 85% feels safe at the workspace. Notwithstanding, there are multiple hazards identified by the workforce. There was a slight increase in the perceived risk of falling bags of ore and a significant rise in the perceived risk of personal falls. Conversely, the perception of subsidence and falling rocks decreased. Flooding awareness increased, while actual flooding incidents reported by respondents saw a substantial rise from 18.75% in 2023 to 40.00% in 2024. The reasons for flooding shifted notably, with more respondents attributing it to neighbouring companies and fewer to direct rainfall.

Accident reporting and types

The percentage of miners witnessing accidents remained similar, with a slight decrease from 84.21% in 2023 to 84.00% in 2024 (most likely stemming from expanded sample). The types of accidents reported have varied, with landslides remaining the most frequently witnessed incident. Witnessed accidents involving personal falls increased slightly, while those involving falling rocks decreased significantly. These discrepancies

between perceived risks and actual incidents highlight the importance of addressing both awareness and practical safety measures.

Structural integrity and maintenance

The confidence in the structural integrity of mine shaft walls has declined. In 2024, only 71.00% of miners believed all walls were strong and solid, down from 83.33% in 2023. More workers reported that only a few walls were strong, indicating growing concerns about specific sections of the mine. Efforts to strengthen walls have shifted towards correcting cracks and regular maintenance, reflecting a focus on ongoing upkeep to ensure safety.

Personal Protective Equipment (PPE) usage

PPE usage among miners has improved. In 2024, 58.59% of miners reported always using PPE, up from 38.30% in 2023. The number of workers who sometimes used PPE decreased, indicating a positive trend towards more consistent use of safety equipment. Among washers, boot usage remained high, with a slight increase in daily usage. The "rent and buy boots" system proved effective, transitioning many women from renting to owning their boots and increasing overall satisfaction with the programme.

Hygiene conditions

Improvements in site cleanliness were noted among underground workers, with 55% considering

the site clean in 2024, up from 28.13% in 2023. However, toilet facilities remain a significant concern, with 88% of underground workers reporting issues in 2024, slightly down from 92.93% in 2023. Suggested solutions included adding more toilets, maintaining existing ones, and ensuring they are equipped with necessary supplies. For washers, the perception of site cleanliness increased from 84.21% in 2023 to 96.97% in 2024, and remained higher than that of underground workers. Toilet issues became more prominent, with 80.81% reporting problems in 2024, up from 25% in 2023. Measures proposed to improve hygiene included building more toilets, raising awareness, and maintaining existing facilities.

Health outcomes

The health, safety, and hygiene conditions at Kamilombe mine have seen significant improvements alongside persistent challenges. Enhanced safety measures, better training, and improved PPE usage have contributed to a safer working environment. However, concerns about structural integrity, flooding, and toilet facilities highlight the need for ongoing efforts and targeted interventions. Continuous monitoring, adaptive safety strategies, and improved infrastructure are essential to ensuring the well-being of all workers at the Kamilombe mine.

Occupational Safety Perception

85%
feels safe at the workplace

2024	72%	100%
2023	70%	100%

Hygienic Conditions

76%
believe workspace is sanitary

2024	55%	97%
2023	28%	84%

Improving Sanitation

62%
wants additional sanitation facilities

2024	59%	40%
2023	72%	36%

Personal Protective Equipment

84%
using PPE every day at work
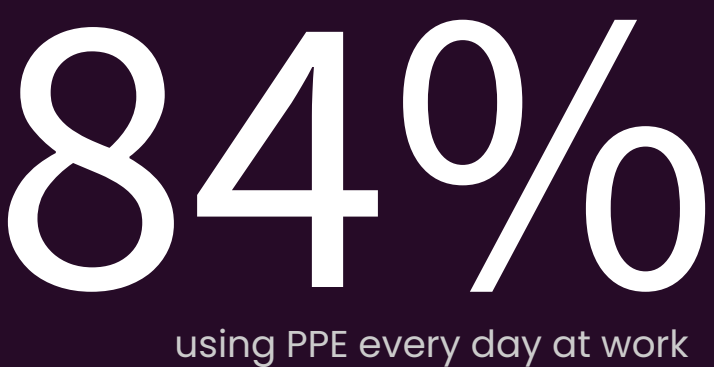
2024	69%	99%
2023	38%	100%

AWARENESS AROUND CHILD LABOUR

PREVALENCE, KEY ISSUES AND DRIVERS OF CHILD LABOUR

Reasons against child labour

The primary reasons cited against children under 18 working in artisanal mines have remained consistent, with the need for children to study and the risks of danger or loss of life being the most prominent. In 2023, 40.11% of respondents emphasised education, and 27.27% highlighted the danger. By 2024, these figures were 37% and 25%, respectively. Interestingly, concerns about delinquency increased to 22%, while the perceived risk of illness dropped to 0%, reflecting changing priorities and perceptions within the community.

Extent and perception of child labour

In 2024, an overwhelming majority of respondents (89%) stated that child labour does not occur in their community, while 10% considered it rare and only 1% believed it was quite common. This suggests either effective enforcement of child labour laws or a lack of visibility of such practices within the community. Despite this, broader community knowing of children working at mine sites (unspecified) was 41.05% in 2023 to 45.45% in 2024, indicating a growing recognition of the issue amongst community members.

Reasons for child labour in cobalt mining

In 2024, the primary reasons identified for child labour in cobalt mining were economic necessity (46%) and lack of educational opportunities (33%). These factors highlight critical areas for intervention to reduce child labour.

Key comparisons and insights

• *Minimum working age*: There is a strong consensus across all groups recognising 18 as the minimum age for working in mines, with increasing agreement from 2023 to 2024.

• *Reasons against child labour*: Both underground workers and washerwomen prioritise education and safety risks as primary reasons against child labour. However, concerns about delinquency and other unspecified risks have increased among the broader community.

• *Extent of child labour*: There is a general perception that child labour is rare or non-existent within the community, though broader community awareness of the issue has increased. Washer women have a higher perception of child labour being common compared to the general community.

• *Community actions*: Both groups take proactive measures, such as making children aware of risks and advising them on education. Washer women are more likely to take immediate action, like chasing children away, while the broader community is inclined towards counselling and raising awareness.

• *Reasons for child labour*: Economic necessity and lack of educational opportunities are consistently identified as primary drivers of child labour across all groups.

• *Government efforts and initiatives*: There are mixed perceptions of government efforts, with a significant portion of the community viewing them as ineffective. However, awareness of local initiatives is relatively high, and their perceived effectiveness is positive.

Concluding summary

The Kapata community shows a nuanced understanding of child labour, recognising both the economic pressures that drive children to work in mines and the severe risks associated with it. Despite improvements in reducing direct household involvement, the broader issue remains seemingly prevalent. Educational campaigns and awareness-raising efforts are seen as vital strategies to combat child labour, though there is a clear need for more effective government enforcement and community-based initiatives. Overall, while progress has been made, ongoing efforts are essential to ensure the safety, health, and education of children in the community.

TOP 3 TAKEAWAYS

Prevalence of Child Labour

Very Common	0%	11%	19%	10%
Quite Common	1%	23%	37%	20%
Rare	10%	58%	38%	35%
Does not Occur	89%	8%	6%	34%

Main Drivers of Child Labour

Economic Necessity	65%	64%	79%	69%
Lack of Education	46%	85%	70%	67%
Family Tradition	2%	12%	8%	7%
Lack of Recreational Activities	15%	3%	12%	10%

Perceived Efficiency of Government Enforcement

Very effective	32%	14%	9%	19%
Effective	26%	50%	38%	37%
Fairly effective	13%	29%	11%	18%
Ineffective	26%	7%	33%	22%
Very ineffective	2%	0%	9%	4%

74%

26%

COOPERATIVE AND NGO PERCEPTIONS

INCLUSIVITY, REPRESENTATION AND MEDICAL COVERAGE

Perception of the cooperative

The sense of being considered by the cooperative has shown improvement among both under-ground workers and washers. In 2023, 55.21% of underground workers felt considered by the cooperative, and this increased to 65.96% in 2024. For washers, the sense of being considered improved slightly from 94.74% in 2023 to 96.00% in 2024. These changes suggest that the cooperative has made efforts to be more inclusive and attentive to the needs of its members, although the improvement is more pronounced among under-ground workers.

When it comes to feeling represented within the coope-rative, the experiences diverge significantly. Among underground workers, the sense of representation decreased from 61.54% in 2023 to 56.99% in 2024, indicating potential issues in communication or participation processes that need to be addressed. In contrast, washers consistently reported feeling represented within the cooperative, maintaining a strong sense of representation at 100% in both years.

The cooperative's actions, particularly in listening, resp-onding to grievances, and involving members in decision-making, also show varied trends. Underground workers saw a significant improvement in the cooperative listening to them, with perceptions rising from 42.11% in 2023 to 66.32% in 2024. However, the response rate to grievances remained unchanged at 51.58%, and there was a sharp decline in feelings of involvement in decision-making, from 69.47% in 2023 to 35.79% in 2024. The involvement in decision-making also saw a modest improvement from 71.43% to 80.00%.

Medical care

Among underground workers, the reliance on the coo-perative for medical care declined from 65.63% in 2023 to 57.00% in 2024, while the reliance on staff/personnel increased from 32.29% to 41.00%. In contrast, washers reported a significant increase in the cooperative being responsible for medical care, rising from 68.42% in 2023 to 99.00% in 2024. This shift indicates a move towards more formalised care arrangements provided by the cooperative for washers, while underground workers are increasingly relying on more personal or informal arrangements.

The scope of medical care coverage by the cooperative has also seen changes. For under-ground workers, there was a substantial increase in the perception that the cooperative covers only workplace accidents, rising from 20.63% in 2023 to 57.89% in 2024. Conversely, the perception of coverage for all diseases decreased from 69.84% to 42.11%. This suggests a narrowing of the cooperative's health coverage for underground workers. On the other hand, washers experienced the opposite trend, with a decrease in the perception that the cooperative covers only accidents, from 42.86% in 2023 to 16.16% in 2024, and an increase in coverage for all diseases from 57.14% to 83.84%.

The perception of medical coverage extending to depe-ndents has declined for both groups. Among under-ground workers, the affirmation that the cooperative's coverage extends to dependents decreased from 17.74% in 2023 to 3.51% in 2024. For Washers, this perception also declined from 28.57% in 2023 to 9.09% in 2024, indicating a perceived or actual reduction in benefits.

Stakeholder perceptions

Awareness of the Fair Cobalt Alliance has increased significantly among underground workers, from 8.33% in 2023 to 43.00% in 2024. However, for washers, awareness slightly decreased from 10.53% in 2023 to 10.00% in 2024, suggesting that outreach efforts may need reinforcement to maintain or improve awareness levels. Awareness of other NGOs working in the community has increased among both groups. For underground workers, awareness rose from 4.17% in 2023 to 18.00% in 2024. For washers, there was a slight increase from 0.00% in 2023 to 1.00% in 2024, indicating initial steps towards improved visibility and engagement of these organisations.

Concluding summary

The survey data from 2023 and 2024 illustrate evolving perceptions among stakeholders regarding their enga-gement and the effectiveness of cooperative actions. While there have been positive shifts in feeling considered and awareness of the cooperative's efforts, there are notable differences in how underground workers and Washers perceive their representation and the coverage of medical care. For underground workers, there are areas of concern, particularly regarding representation and the compre-hensive coverage of medical care. For Washers, the data show significant improvements in communication and medical care responsibility, but there are still gaps in dependents' coverage and awareness of certain initiatives. The increasing awareness of FCA and other NGOs presents an opportunity for greater collaboration and resource mobilisation to address community needs.

Cooperative Representation

67%
aggregated score of the cooperative's engagement and support

Sense of Consideration	66%	96%	81%
Sense of Representation	57%	99%	78%
Sense of Inclusion	51%	66%	56%

Medical Coverage

78%
are covered by the cooperative

2024	57%	99%

Awareness of the Fair Cobalt Alliance

27%
have heard of the FCA

2024	43%	10%	27%	27%
2023	8%	10%	4%	7%
	+137%	+-0%	+148%	+117%

Key Aggregations and Comparisons
Income and Household Goods

KEY FINANCIAL AND INCOME TRENDS
NAVIGATING VOLATILITY

Underground workers face significant financial instability, with the average rating for household income stability from cobalt mining being 2.2. A substantial 72% rated their income stability as "Very unstable" or "Unstable," and 84% reported that external factors like market price fluctuations negatively impacted their financial position. The primary reasons for perceived instability include decreased cobalt prices, insufficient income to cover expenses, and low or unstable production levels. Fluctuating market prices were cited as the most significant challenge (87%), followed by lack of access to credit (34%), regulatory problems (14%), and security issues (7%).

In terms of savings, 55% of underground workers reported being able to save some portion of their income, while 44% did not save any money, indicating a significant portion of the workforce living day-to-day. Asset ownership is limited, with 74% being tenants, 14% owning motorbikes, 4% owning cars, and 2% owning trucks. Basic household goods like radios and televisions are more commonly owned (87% and 67%, respectively), but fewer households have access to fridges/freezers (19%) or mattresses (12%).

Washers also experience financial instability but show a slightly different financial landscape. Only 35% noted that their earnings from cobalt washing were sufficient to cover basic household needs, and just 25% described their financial situation as stable. The predominant challenges include fluctuating market prices (76%), regulatory problems (49%), lack of access to credit (17%), and security problems (6%). Despite these challenges, a significant majority of washers (87.63%) report saving or investing a portion of their income, primarily in education (45.36%) and healthcare (35.05%). Washers face substantial barriers to formal financial inclusion, with 99% lacking a bank account. Nearly half (46.08%) have received loans or credit, with an overwhelming majority (97.87%) relying on informal sources. Financial services are perceived as largely inaccessible, with 34% rating them as very inaccessible and only 23% finding them accessible.

Community members, especially those running small businesses or engaging in income-generating activities, also face financial challenges. Only 33% of community members reported running a small business or engaging in income-generating activities. The median duration of running a business is 1-3 (2) years, with an average income increase of 25% after starting the business. However, 75% of respondents face challenges such as high tax rates, agricultural difficulties, insecurity, and low demand. Asset ownership is similarly limited, with 62.4% being tenants, 20% owning motorbikes, 2.1% owning cars, and 1% owning trucks. Basic household goods like radios (75.8%) and televisions (64%) are more commonly owned, but fewer households have access to fridges/freezers (30.4%) or mattresses (42%).

Income Instability

Unstable income	72%	40%	**56%**

56%
have an unstable income

Underground workers are 1.8 times more likely to have unstable income

Savings

2024	55%	88%	**72%**

72%
are saving regularly

Washers are 1.6 times more likely to save compared to underground workers

Key Causes of Financial Instability

Fluctuating Market Prices	87%	76%	**82%**

82%
are predominantly affected by fluctuating market prices

Access to Finance

Have a Bank Account	2%	1%	**1.5%**
Access Financial Services	20%	46%	**33%**
Rely on Informal Finance	95%	98%	**96%**

Main Expenses, in order

1. Education	59%	86%	**73%**
2. Health Care	48%	68%	**58%**
3. Transport	38%	48%	**43%**
4. Equipment/Tools	42%	34%	**38%**
5. Savings/Investment	25%	32%	**29%**

Dependence on mining

2024	74%	84%	**79%**

79%
have mining as the only income source

KEY FINANCIAL AND INCOME TRENDS
INCOME CALCULATIONS

Savings behaviour among community members is limited, with only 10% saving or investing, highlighting a potential area for financial improvement. Main expenses include education (38%), health care (39%), and transport (29%). The community members show a broader range of financial activities and income sources, indicating a more diversified economic base, with 95% reporting additional sources of income, including wages (22%) and registered trade (2%).

Daily income for underground workers increased from 4,285.71 CDF (2.06 USD) in 2023 to 11,285.71 CDF (4.18 USD) in 2024. Similarly, weekly income rose from 30,000 CDF (14.40 USD) to 79,000 CDF (29.26 USD), and monthly income from 130,357.2 CDF (62.57 USD) to 343,273.96 CDF (127.14 USD). This represents a 102% increase in median income, indicating an overall improvement in earnings despite ongoing instability. However, when adjusting for inflation, the gains in purchasing power are less pronounced. In 2023, with an inflation adjustment of approximately 19.9%, the real daily value of 4,285 CDF dropped to about 1.72 USD. In 2024, inflation further impacted real purchasing power, reducing the effective value of the higher daily income of 11,285 CDF (4.18 USD) to approximately 3.45 USD with a 21% inflation adjustment. This highlights that, despite nominal increases, workers' ability to afford goods and services has not improved as significantly, impacting their capacity to meet basic needs.

Washers also experienced significant income increases. For individual washers, daily earnings rose from 4,500 CDF (2.25 USD) in 2023 to 8,000 CDF (2.96 USD) in 2024, marking a 32% increase. Weekly and monthly earnings followed a similar trend, with weekly earnings increasing from 22,500 CDF (11.25 USD) to 40,000 CDF (14.81 USD), and monthly earnings from 90,000 CDF (45.00 USD) to 160,000 CDF (59.26 USD). Group Washers saw their daily income rise from 6,000 CDF (3.00 USD) to 8,000 CDF (2.96 USD). However, after adjusting for inflation, the real value of these increases also diminished. In 2023, with an inflation adjustment of approximately 19.9%, the real daily income for washers dropped from 4,286 CDF to around 1.72 USD. By 2024, even with a higher income of 8,000 CDF, the 21% inflation adjustment reduces purchasing power to approximately 2.34 USD per day, indicating that while nominal earnings have risen, purchasing power gains remain limited. Washers also rely heavily on informal savings methods due to limited access to formal banking services, with 99% lacking a bank account compared to 98% of under-ground workers.

Community members running small businesses reported a median monthly income increase from 120,000 CDF (44.44 USD) before starting the business to 150,000 CDF (55.56 USD) after starting the business, reflecting a 25% income increase. However, the majority of community members face financial challenges, with 75% reporting difficulties such as high tax rates, agricultural challenges, insecurity, and low demand. The median income for community members is CDF 50,000 per week (18.5 USD) or CDF 200,000 per month (74 USD).

TOP TAKEAWAYS

Income

Male diggers earn

65%

more than women washers

	Daily	Weekly	Monthly	Daily	Weekly	Monthly
2024	$ 4.18	$ 29.26	$ 127.14	$ 2.96	$ 14.81	$ 59
2023	$ 2.06	14.40	$ 62.57	$ 2.25	$ 11.25	$ 45

A nominal increase by: 102% (34% difference) | A nominal increase by: 32% (13.6% difference)

Male underground workers are estimated to earn an average of 65% or 1.65 times, more than female washers. Men's income increased 3.19 times more than for women.

Despite increases, real purchasing power decreased between 2023 and 2024 (taking in to account currency depreciation and inflation rates, which increased).

LEVERAGING INSIGHTS

The findings presented in this report offer the FCA critical insights into the needs, challenges, and perceptions of ASM workers and communities, reinforcing FCA's broader vision to make artisanal cobalt mining more equitable, sustainable, and inclusive. These findings continuously support FCA to deepen its focus on several key areas in ASM cobalt mining, ensuring that community-centred approaches are woven into broader industry and policy frameworks. FCA's reflections on incorporating these findings into its wider objectives include the following areas:

CULTIVATING A CULTURE OF CONTINUOUS IMPROVEMENT AND ADAPTABILITY

DATA-DRIVEN PROGRAMME ADJUSTMENTS: Recognising that the socio-economic and operational landscape of ASM mining is dynamic, the FCA underscores the importance of continuous data collection and adaptive learning. Perception surveys serve as essential tools to understand how interventions impact workers and communities over time. The FCA is committed to embedding a feedback-oriented approach that allows for agile adjustments based on real-time data, ensuring programmes remain relevant and impactful.

LONGITUDINAL IMPACT TRACKING: The FCA sees value in not only collecting perception data annually but also establishing a longitudinal framework that tracks trends and evolving needs across the years. Such an approach provide insights into whether interventions create lasting change and reveal new or persistent challenges that require attention. This iterative learning process is pivotal for the FCA's goal to develop a ASM cobalt sector that is resilient, responsive, and reflective of miners' lived experiences.

THE NEXT STEPS

DEEPENING MULTI-STAKEHOLDER PARTNERSHIPS FOR SYSTEMIC CHANGE

LOCAL AND NATIONAL GOVERNMENT COLLABORATION: The survey findings underscore the complexity of ASM challenges—ranging from child labour prevention to safety measures—that require support beyond individual mine sites. The FCA is dedicated to strengthening relationships with local and national government entities, advocating for ASM-inclusive policies, and developing frameworks that enable ASM communities with legal, educational, and social resources.

CROSS-ORGANISATIONAL SYNERGY: The FCA recognises that advancing responsible sourcing and fair market practices in the cobalt sector cannot happen in isolation. Working alongside NGOs, community-based organisations, educational institutions, and industry leaders allow the FCA to harness specialised expertise and resources to address multi-dimensional challenges such as financial inclusion and child labour. Collaborating across sectors and borders will bolster the FCA's impact, create economies of scale for interventions, and establish a foundation for unified action within the ASM cobalt sector.

GLOBAL ENGAGEMENT AND ADVOCACY: The FCA also sees its role in contributing to global engagement around ASM by advocating for international standards that protect ASM workers, promote fair labour practices, and foster inclusive economic development. The FCA use data-driven insights to inform international dialogues and support standard development that addresses the unique challenges of ASM cobalt communities.

EXPANDING DATA-DRIVEN ADVOCACY FOR WORKER WELLBEING

ADVANCING SAFETY STANDARDS THROUGH EVIDENCE-BASED ADVOCACY: The survey's insights into safety challenges, such as inadequate PPE use and sanitation infrastructure, highlight the need for consistent safety standards in ASM cobalt mining. The FCA intends to leverage this data to promote industry-wide adoption of minimum safety requirements that can be applied at all ASM sites. These standards, supported by quantitative data, allow the FCA to advocate for measures that ensure miner safety and health while aligning with global safety expectations for ethical sourcing.

PROMOTING FINANCIAL INCLUSION AND ECONOMIC RESILIENCE: Economic instability due to cobalt price fluctuations is a significant issue, and the FCA is committed to advocating for holistic changes that enhance miners' economic resilience. Partnering with financial institutions, FCA can explore ways to integrate digital financial services and community savings groups into ASM communities. Data from the survey enables FCA to highlight these needs in outreach, contributing to broader financial inclusion initiatives that are aligned with the specific realities of ASM workers.

INTEGRATING CHILD LABOUR PREVENTION INTO COMMUNITY DEVELOPMENT: The survey highlights the community's awareness and concern regarding child labour, which the FCA views as a crucial entry point for broader community development through The Hub. By investing in educational resources, alternative youth programmes, and family support structures, FCA and The Centre aims to strengthen community resilience against economic pressures that lead to child labour. Collaborating with educational institutions and social welfare organisations will allow FCA to build a comprehensive support system that discourages child labour while fostering skill development for ASM communities.

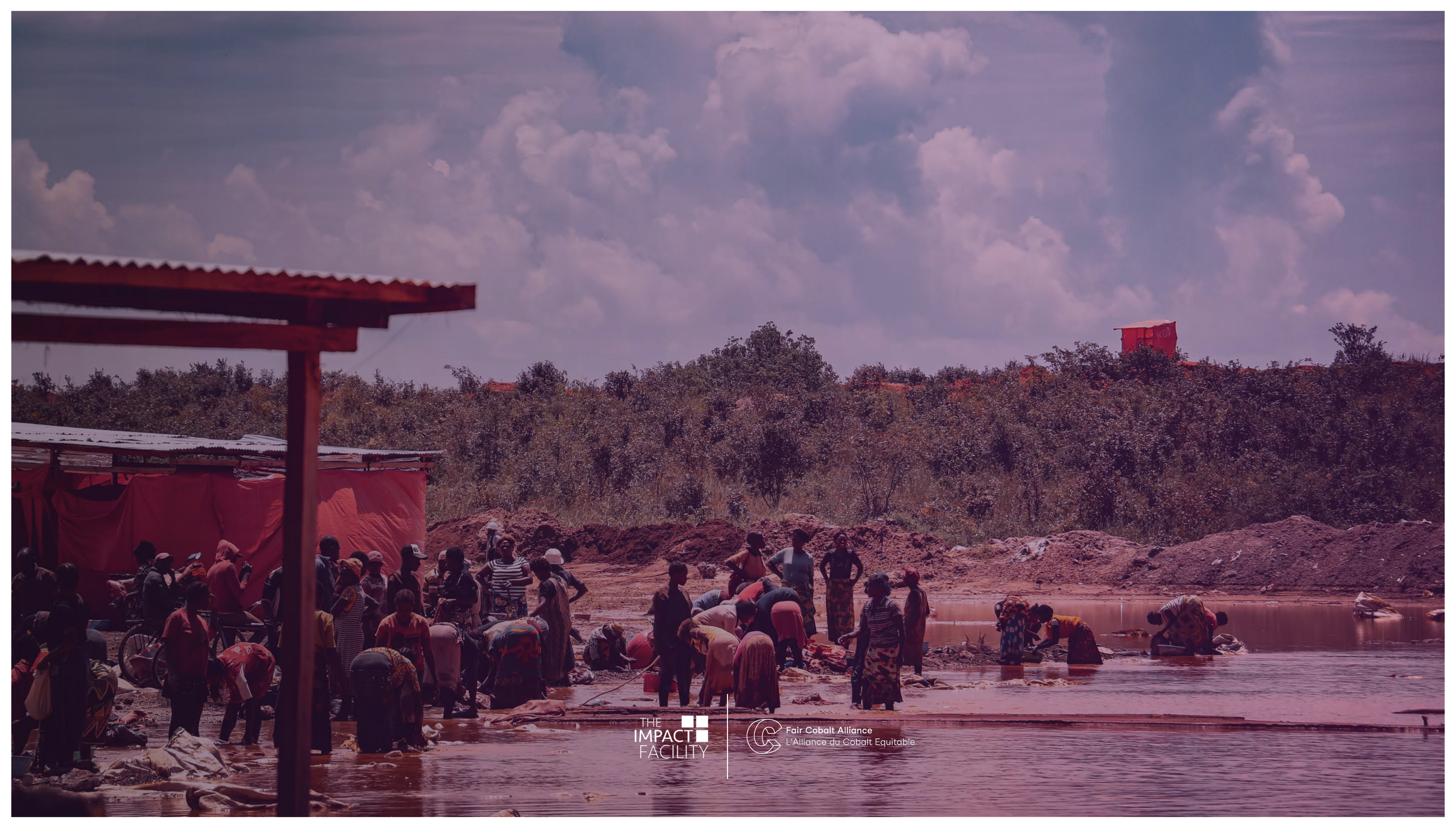## SUPPORTING TRANSPARENT AND INCLUSIVE SUPPLY CHAIN PARTICIPATION

ENHANCING TRADE TRANSPARENCY: Survey findings reflect miners' desire for transparency, particularly in ore grading and payment fairness. The FCA recognises that fair and transparent market practices are essential for an ethical and inclusive supply chain. Using the survey insights, the FCA aims to strengthen trade transparency, ensuring ASM cobalt meets international standards and that the benefits are shared equitably with miners.

CAPACITY BUILDING WITHIN COOPERATIVES AND COMMUNITIES: Effective participation in supply chains requires enabled cooperatives with strong governance, accountability, and transparency practices. The FCA's survey results, which reveal the need for improved cooperative engagement, reinforce the FCA's objective to invest in cooperation that build cooperative capacity in areas such as dispute resolution, management, and leadership. Strengthening these internal structures can enable ASM communities to engage more effectively in the cobalt value chain, fostering local ownership and long-term sustainability.

SHOWCASING BEST PRACTICES TO PROMOTE GLOBAL MARKET ACCESS: By sharing successful ASM engagement models that emphasise transparency and fair labour practices, the FCA aims to promote market acceptance of responsibly sourced ASM cobalt. This strategy not only improves supply chain standards but also positions ASM cobalt as a valuable component of sustainable energy supply chains. Survey insights into miners' trust levels and market fairness perceptions support FCA's goal to model ethical sourcing practices that can be scaled and replicated, creating a benchmark for ASM cobalt in global markets.

Fair Cobalt Alliance
L'Alliance du Cobalt Equitable