STAKEHOLDER ATTITUDES SURVEY
1 MARCH 2019

1. INTRODUCTION

This survey, being the first of its kind, examines the HCS Approach, HCSA as an organisation, and the benefits derived from being a member of the HCSA. Data was collected through two online surveys; one for HSCA Members and the other for Prospective Members, across various functions. The results from both surveys provide insight into how the organisation and tool are viewed as well as actionable feedback on improving utility and value to stakeholders.

The following document will lay out the research objectives, outline findings from both surveys and contrast views between Members and Prospective Members, and between different functional organisations.

Throughout the survey, some themes are visited more than once. These repeated themes are clear indications of agreement, and of conflict, between respondents, and are explored in more detail in the concluding section of this document.

2. RESEARCH OBJECTIVES

The aim of this survey was to identify opportunities to increase the reach and influence of HCSA by reviewing Members (internal) and Prospective Members (external) views on:

- HCSA as an organisation
- Visible impact of HCS Approach
- Membership structure and stakeholder mix
- Benefits of the HCSA membership

The survey would also capture members' and prospective members' views and positions on deforestation, the HCS Approach and to obtain recommendations to further the cause of HCSA in its mission, and as an organization.

3. METHODOLOGY

3.1. Procedure
Data was collected through an online survey tool, and through an offline, printable copy of the same survey. Two separate surveys were developed for Members and for Prospective Members to reflect differences between the two audience groups. Including demographic questions, there were 13 similar questions, with some variations between the two surveys. The Member survey had two additional questions relating to membership outcomes that would otherwise be irrelevant to Prospective Members. The questions were structured around four main topics: (1) Deforestation, (2) HCS Approach as a tool, (3) HCSA as an organization, and (4) HCSA in the future

3.2 Participants
All participants were identified by HCSA, with individual respondents tasked with obtaining responses at an organisational, rather than personal, level. The survey was disseminated in three waves, from August 2018 through to October 2018, and extended for another two waves, through to December 2018, in order to accomodate returns from additional Prospective Members. Data collection was managed by SPRG.

Participants were split by organisational types; Growers, Users, Non-Governmental Organisations (NGOs), Technical Support Organisations (TSOs), Financial Institutions (FIs) and Academia.

All 25 Members responded to the survey, while only 20 of the 60 Prospective Members submitted complete responses.

Members	Prospective Members
● 25 recipients	● 60 recipients
● 25 responses @ 100%	● 20 responses @ 33%
● Growers (7), Users (3), NGOs (7), TSOs (8)	● Growers (4), Users (4), NGOs (2), TSOs (3), Financial Institutes (4), Academics (3)

4. RESULTS

The results are broken down into the four main areas of investigation; Deforestation, HCS Approach, HCSA as an Organisation and HCSA in the Future. A fifth area, Membership, part of the organisational pillar, was further separated out for simplicity of narration.

4.1. Membership

When asked about membership, 100% of Member respondents indicated their commitment to renewing their membership with HCSA.

Will your organisation be renewing its membership in the HCSA?

Would your organisation be interested in becoming a member of the HCSA?
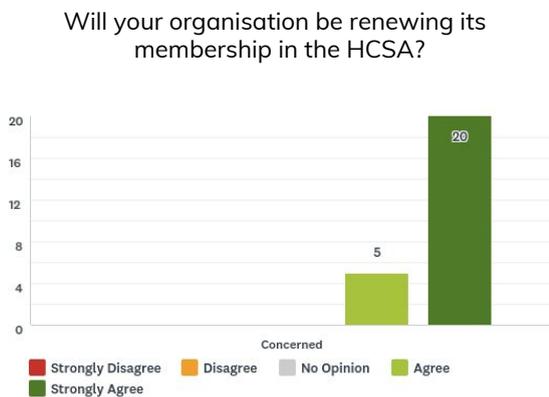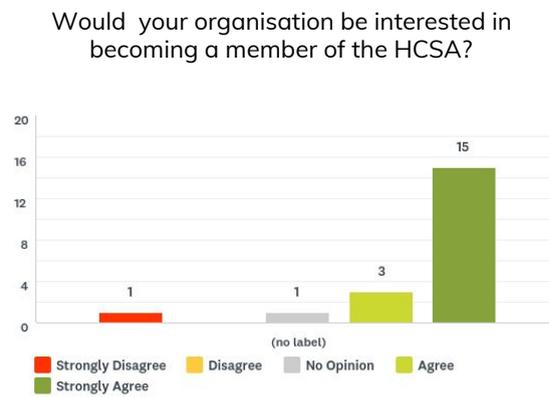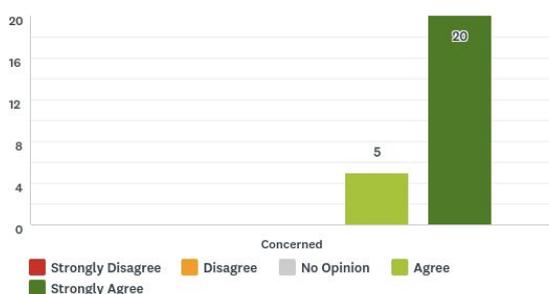

Fig 4.1.1 Members

Fig 4.1.2 Prospective Members

Of the 20 Prospective Members surveyed, 60% indicated a keen interest in HCSA membership. Of the 40 per cent who indicated 'No', the majority of them suggested a different membership affiliation or areas of specialisation, while some other cited resource constraints.
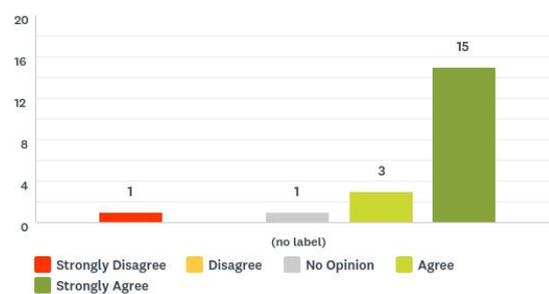
4.2. Deforestation

A large majority (20 out of 25) of Member respondents indicated 'Strongly Agree' when asked if they were concerned about deforestation and its effect on society and the environment. A similar trend was observed from the Prospective Member's survey results.

Fig 4.2.1. My organisation is concerned about deforestation and its effects on society and the environment
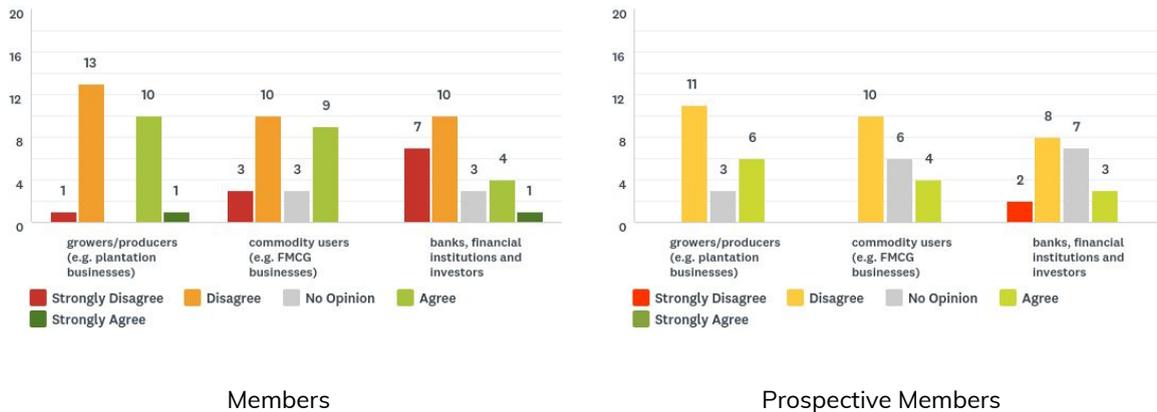

Members

Prospective Members

Also, both Member and Prospective Member respondents were aligned in their thinking that more organisations should take the issue of deforestation seriously.

Fig 4.2.2. Enough of these organisations are taking the issue of deforestation seriously

Members   Prospective Members

Respondents were asked to share their perspective on how sustainability and the prevention of deforestation are important to their organisation. Both groups had similar responses across two broad themes; importance of sustainable development on the planet, particularly amongst NGOs and TSOs, and being directly related to continuity of operations for organisations, amongst Growers and Users.

4.3. HCS Approach
The majority of all respondents agreed that the HCSA tool is practical and effective in identifying forests for conservation. However, both groups were split on the impact of the tool in conserving forests, supporting local communities and mitigating climate change.

Fig 4.3.1. Member perspectives on outcomes from HCS Approach

	STRONGLY DISAGREE	DISAGREE	NO OPINION	AGREE	STRONGLY AGREE	DON'T KNOW	TOTAL	WEIGHTED AVERAGE
is a practical, transparent, robust, and scientifically credible way to meet no deforestation commitments	0.00% 0	5.00% 1	5.00% 1	65.00% 13	25.00% 5	0.00% 0	20	4.10
has been an effective tool for identifying forests for conservation	0.00% 0	0.00% 0	10.00% 2	65.00% 13	25.00% 5	0.00% 0	20	4.15
has been an effective tool for conserving forests	0.00% 0	15.00% 3	35.00% 7	30.00% 6	15.00% 3	5.00% 1	20	3.47
has been an effective tool for supporting local community rights, and livelihoods and poverty alleviation	0.00% 0	15.00% 3	50.00% 10	25.00% 5	5.00% 1	5.00% 1	20	3.21
has been an effective tool for mitigating the effects of climate change	0.00% 0	0.00% 0	50.00% 10	30.00% 6	5.00% 1	15.00% 3	20	3.47

Fig 4.3.2. Prospective Member perspectives on outcomes from HCS Approach

	STRONGLY DISAGREE	DISAGREE	NO OPINION	AGREE	STRONGLY AGREE	DON'T KNOW	TOTAL	WEIGHTED AVERAGE
is a practical, transparent, robust, and scientifically credible way to meet no deforestation commitments	0.00% 0	8.00% 2	4.00% 1	68.00% 17	20.00% 5	0.00% 0	25	4.00
has been an effective tool for identifying forests for conservation	0.00% 0	4.00% 1	0.00% 0	64.00% 16	32.00% 8	0.00% 0	25	4.24
has been an effective tool for conserving forests	0.00% 0	36.00% 9	28.00% 7	28.00% 7	4.00% 1	4.00% 1	25	3.00
has been an effective tool for supporting local community rights, and livelihoods and poverty alleviation	0.00% 0	24.00% 6	28.00% 7	40.00% 10	0.00% 0	8.00% 2	25	3.17
has been an effective tool for mitigating the effects of climate change	0.00% 0	20.00% 5	20.00% 5	48.00% 12	4.00% 1	8.00% 2	25	3.39

4.4. HCSA as an organisation
Respondents were asked a series of questions to evaluate Member and Prospective Member views of the HCSA as an organisation.

When asked through open-ended questions to identify the most important objectives of the HCSA, respondents arrived at three main themes. They felt the HCSA:

1. Provides a clear, practical and scientific-based methodology to implement no-deforestation commitments
2. Provides a platform for multi-stakeholder collaboration in addressing deforestation
3. Communicates and engages with the broader community to drive wider adoption and recognition for standards-based approaches

A further two themes emerged; objectives that the HCSA should have as objectives:

4. Reconcile different approaches and improve integration with existing assessments
5. Provide clarity if HCSA is primarily an owner of the HCSA toolkit, or if it should play a broader role, with the toolkit being just one aspect of the organisation

Respondents were also asked to share what they think are some of the more effective ways in which HCSA can better communicate with their respective organisations. A substantial segment of Member respondents suggested an increase in channels, frequency, reach and visibility of communications put out by HCSA. Overall, three main themes surfaced:

1. Current communication model is sufficient vs. an increase in channels, frequency, reach and visibility
2. Need for HCSA to unify stakeholders' objectives for better collaboration
3. Provide clear guidance for implementation.

Among Prospective Member respondents, some felt that there could be more guidance and knowledge sharing when it comes to HCSA's communications, especially on data areas such as data exchange and communicating successes.

Members were also asked about benefits from HCSA membership. An overwhelming 92% of Member respondents indicated that they have benefited from HCSA.

When asked about views on the types of benefit, Members and Prospective Members had slightly different perspectives.

Benefits of HCSA membership	Member Ranking	Prospective Ranking
To influence the HCS Approach process and methodology	1 (80.8%)	2 (50.0%)
To negotiate deforestation issues as part of a multi-stakeholder group	2 (76.9%)	6 (35.0%)
To shape the future of forestry through dialogue and networking with key industry players	3 (73.1%)	1 (65.0%)

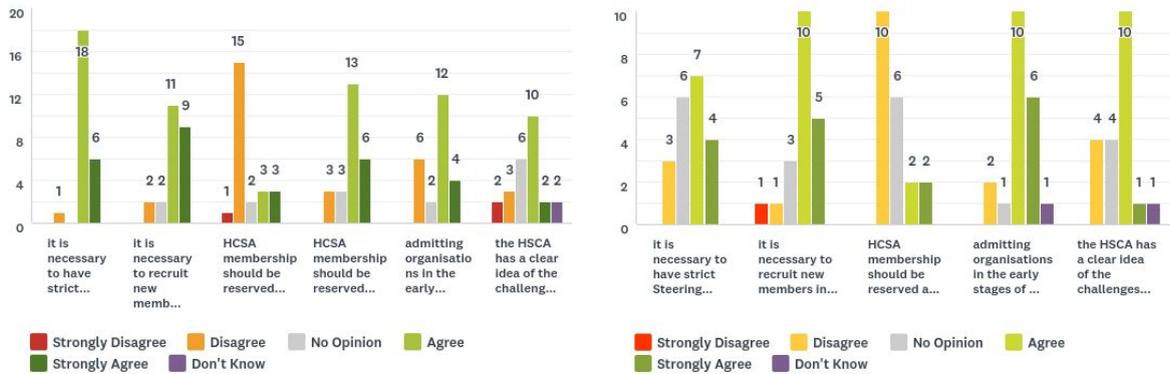| To contribute to and be associated with the conservation to tropical forest being conserved on the ground	**4** (65.2%)	**3** (45.0%)
To better understand the HCS Approach tool and more quickly receive updates on changes	**5** (61.5%)	**3** (45.0%)
To show that we are members of an internationally recognised environmental initiative	**6** (53.4%)	**5** (40.0%)

Member respondents ranked 'To influence the HCS Approach process and methodology' as the number one benefit, while Prospective Member respondents ranked 'To shape the future of forestry through dialogue and networking with key industry players' as their number one benefit.

Amongst FIs and Academics, two groups currently not represented in the HCSA, 'To shape the future of forestry through dialogue and networking with key industry players', 'To show that we are members of an internationally recognised environmental initiative', and 'To negotiate deforestation issues as part of a multi-stakeholder group' were their top expected benefits.

Finally, views were sought from both groups on how they viewed membership requirements. Specifically, they were asked if;
- it is necessary to have strict Steering Group membership requirements in order to protect the integrity of the HCSA
- it is necessary to recruit new members in order to broaden the HCSA network and achieve widespread acceptance and adoption
- HCSA membership should be reserved as a reward for companies that have successfully implemented HCS in their operations
- HCSA membership should be reserved as a reward for companies that have committed to implement HCS in their operations
- admitting organisations in the early stages of HCS adoption will improve the speed and success of HCS implementation in their operations/supply chains
- the HSCA has a clear idea of the challenges that growers and commodity users face in eliminating deforestation

Fig 4.4.1. The HCSA should…

Both Members and Prospective Members were closely aligned in their attitudes towards membership requirements. Amongst Members, most agreed that recruiting new members was important, but so is maintaining strict SG membership requirements. On membership, members felt that conditions for membership should be based on commitment, rather than upon full implementation.

4.5. HCSA in the future

Building on to section 4.4, the survey took in recommendations on how HCSA as a methodological tool, and how as an organisation, it can better meet the needs of its members while bringing further benefits to the industry.

In open-ended responses to the first part of this section, Members were asked to elaborate on future benefits the HCSA could provide their organisations. There are five main themes that surfaced;
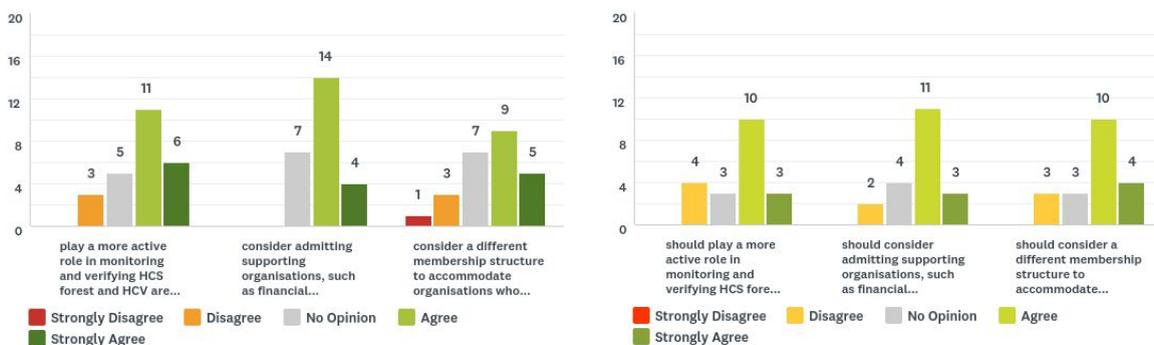
1. **Further collaboration** leveraging multi-stakeholder platform
2. **Integration** with existing policies, commitments and targets
3. **Visible impact** and better communication about HCSA and member results
4. **Uphold governance** and ensure methodology is implemented with integrity
5. **Continuous improvement** and ongoing innovation to improve and fill gaps in implementation

The second part of this section concentrates on the role HCSA should play, and the types of members being admitted into HCSA.

On the role of HCSA in the future, respondents were presented three statements around possible evolutions of the HCSA:

*   should play a more active role in monitoring and verifying HCS forest and HCV area conservation on the ground
*   should consider admitting supporting organisations, such as financial institutes and industry organisations, in order to provide credibility and value to the HCSA
*   should consider a different membership structure to accommodate organisations who want to support HCSA but don't want to be fully involved
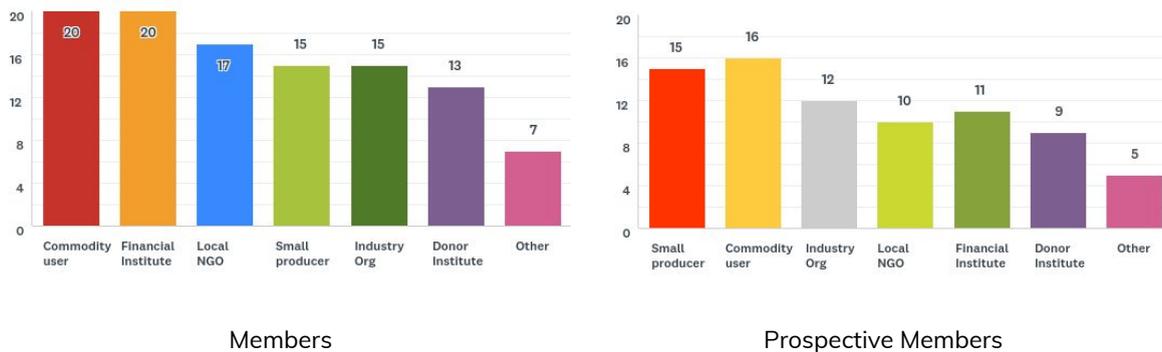
Fig 4.5.1. Moving forward...

Majority of Member respondents agree that HCSA should play a more active role in monitoring and verifying HCS forest and HCV area conservation on the ground, while responses from Prospective Member respondents garnered mixed responses. On the different membership structure, Members were split on the topic, with several expressing no opinion. On the other hand, Prospective Member respondents were in agreement that there should be a different membership structure. However, both Member and Prospective Member respondents surveyed agreed that HCS should admit FIs and industry organisations.

On the types of organisations they would like to see joining the HCSA, Members and Prospective Members had differing perspectives. Both groups were strongly aligned in admitting commodity users, but appeared to diverge in other areas. On the whole, Members were more accepting of new members across the various functions, while Prospective Members were more moderate.

Fig 4.5.2. What types of organisations would you like to see join the HCSA?

Members   Prospective Members

The third part of this section targets both Member and Prospective Member respondents on how HCSA can better meet their needs. Seven main themes emerged.
1. Driving strategic partnerships and widening engagement
2. Improving monitoring and reporting to enhance communication externally
3. Greater integration with existing initiatives and frameworks
4. Enhancing ground research, extensible tools, and data sharing
5. Improving speed in decision making
6. Improving governance
7. Enhancing HCSA value and credibility

These themes are often complementary, with Integration and Governance emerging in other questions as well. Both Member and Prospective Member respondents believe that HCSA would need to do more in the space of driving partnerships, engagements, communications and research. On credibility, a member cautioned that HCSA as an

organisation should focus on the key objective of Forest Cover, and not spill over to other areas that could dilute the attention.

5. CONCLUSION

In collating survey results, several broad themes emerge.

First, in the respondents' views on HCSA as a tool, most recognise the scientific and practical value of the HCS Approach, and it being most effective in identifying forests for conservation to date. However, responses were mixed on the impact the tool has had in conserving our forests, supporting local community rights and livelihoods, and mitigating climate change. Respondents are largely supportive of broadening the tools, including at landscape and small scale, and through working with other initiatives.

Improving integration with other approaches and frameworks was also a common refrain. Having uniform or complementary standards would make the path forward clearer for all parties, though it remains to be seen if such integration is practical.

Second, respondents were largely supportive of extending membership to a wider network. Broadly speaking, most respondents agree with recruiting more organisations and admitting supporting organisations. Respondents feel that recognition by financial institutes and industry organisations will provide credibility and value to HCSA, and that a strict SG membership requirements remain necessary. There is also some consensus that admitting organisations in the early stages of adoption will improve speed and success of HCSA implementation, and that adopting tiered membership structure will allow the HCSA to incorporate more points of view from organisations that may not have the time or resources to commit to full membership.

Third, and related to broadening membership, is governance. There is concern that membership requirements should not be diluted, and that improving HCSA's stature is predicated on establishing credibility, with corresponding need for better quality monitoring, reporting and communication to demonstrate the effectiveness of the approach. Requirements should also be strictly enforced after joining the HCSA, and member organisations that fall short of these requirements should be appropriately censured.

Fourth, when considering benefits of membership, respondents value HCSA as a multi-stakeholder platform, to collectively discuss and shape conservation methodology efforts across industries and institutions. This platform can play a vital role in driving partnership, and improve integration and acceptance of the HCSA standard.

Looking at the responses holistically, there are more areas of agreement between members than there are differences. Based on member feedback, and these differences can be remedied by clarifying the organisations macro-level objectives. While there are fewer commonalities between member and non-member perspectives, these are likely the result of a lack of education around HCSA and its results in practice. These can be easily addressed by more consistent external engagement.