UNDERSTANDING THE COSTS OF GREEN CONFLICT

THE STATE OF PLAY IN MEASURING AND MANAGING THE VALUE LOST TO RENEWABLES PROJECTS FROM SOCIAL RISK AND OPPOSITION

DIALOGUE INSIGHTS

IHRB
Institute for Human Rights and Business

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INTRODUCTION

On 31 March 2025, the Institute for Human Rights and Business (IHRB) hosted an expert dialogue with representatives from wind and solar companies and industry associations on the value at stake when renewables companies experience social opposition and conflict with stakeholders affected by their projects. The discussion was hosted at the offices of Clifford Chance LLP in London, at the mid-way point of IHRB's two-year research and engagement project - The Costs of Green Conflict.

This project is exploring a core question: if the costs of social opposition and conflict experienced by the renewables industry were better understood, would relationships between companies and local communities receive greater priority and attention?

The project is inspired by similar research from 2014 into fossil fuel extraction, exploring the case for social opposition and conflict to be considered as a means through which environmental and social risks are translated into business costs and decision making. This research found that company-community conflict at hydrocarbon extraction sites could cost a business as much as $10,000 per day during initial exploration; up to $50,000/day during advanced exploration; and as much as $ 20 million/ week during operations.

The March 2025 expert dialogue built on earlier multistakeholder convenings launching the project in February 2024 (Washington, D.C.) and in October 2024 (Geneva) on the state of widening global conflict and the role of business. The dialogue sought to enable constructive exchange amongst key industry actors across the renewables value chain to better understand the spectrum of costs that renewables companies incur when they experience conflict with local communities. In particular, it aimed to:

- Understand the existing **state of play in costing efforts** across the environmental, occupational health and safety, social risk, and other ESG areas more broadly.
- Learn from individual and collective experiences of how social opposition and conflict-related **costs are identified, understood, and managed**.
- Explore the **extent and nature of the business case** for improved human rights due diligence as a key tool for avoiding and mitigating company-community conflict across the global renewables rollout.

KEY DEFINITIONS

- **Costs** are considered to be the negative impacts on a company's tangible and intangible assets from failing to avoid, mitigate or resolve conflict at an early stage, as well as the potential value foregone.*
- **Conflict** or social opposition to renewables projects is defined broadly and along a continuum, from low-level tension to escalated situations involving a complete relationship break-down or violence.*
- **Green** in this research is focused on solar and wind projects at the site-level - two renewable energy technologies with significant projected growth in the coming years (though the implications are expected to be highly transferable to other green technologies and value chain relationships).

** Building on Davis/Franks "Costs of Conflict" for the hydrocarbon sector (2014)*

STATE OF PLAY

The dialogue painted a broad picture around how social opposition and conflict at renewables sites are understood by industry practitioners - and how that is managed as a core business cost. The following state of play was highlighted:

- **There is a tension between speed and trust:** The urgency of the climate crisis means that renewables are required at rapid pace and scale. Conversely, time and patience is required for effective engagement with affected stakeholders to prevent, mitigate, and remedy any harms to livelihoods, land rights, environmental damage or other potential adverse impacts associated with renewables projects. This makes early and ongoing human rights due diligence critical, albeit challenging to balance pace and patience. If engagement is absent or done poorly, a host of opposition against and conflict with renewables projects can result.

- **The renewables sector cannot afford conflict:** Tight margins and varying market dynamics are pressuring the industry. The renewable sector operates under tighter financial margins and fewer reserves than the fossil fuels sector. This can pose a challenge resourcing effective social risk prevention, particularly given the urgency applied to the transition.

- **Green conflict is a spectrum: S**ome wind and solar practitioners find the terms "social opposition" or "grievance" to be more accurate than the term "conflict". This reflects the reality that renewables projects can experience a range of opposition and conflict - from minor tensions such as procedure-based complaints, to physical protest or violence to people and property - all impacting project timelines, costs, and reputation.

- **Such conflict brings a range of financial and non-financial costs:** The types of costs that can arise vary. Financial costs can include material damage, additional capital requirements, and cancellations. Non-financial costs can include delays, additional personnel time, and reputational damage.

- **These costs are buried in the system:** While many practitioners recognise that social opposition and conflict can increase costs or delays in various ways, the extent of such costs is largely unknown. Costs are often dispersed across multiple company cost centres as well as actors in the value chain - from project developers to their investors, host governments, and communities themselves - meaning they are not directly visible in financial reporting. Many practitioners feel the relevance of these costs are underestimated as a result, particularly as they are often not identified or quantified early in project development and tracked throughout the lifecycle.

- **Context varies, so do the costs:** Each project's local context will be different, depending on local histories, cultures, and rules. Communities may respond differently to renewable energy projects based on historical experiences, cultural norms, proximity to neighbouring developments, and other factors. Given these manifestations of context are variable, so too are the costs arising from any conflict.

- **Well-managed projects can also bring a range of material benefits:** Investing in a strong social license to operate is seen by many practitioners as a potentially powerful "premium" that requires better valuation, including the non-monetary benefits of well-managed stakeholder relationships. For example, local stakeholder insights into environmental and contextual factors that can directly support project success.

- **Managing social risks is key to minimising costs:** Community concerns around specific projects can present valuable engagement opportunities. This can indicate that affected stakeholders trust the process and - if well managed - lead to more robust relationships. These inputs are invaluable to wind and solar leaders to surface local concerns, respond to them proactively, and avoid the risk of issues escalating.

- **Even when stakeholder engagement is done well, opposition can still arise:** Meaningful stakeholder engagement is an established practice that many industry actors have been implementing for years. Nonetheless, even in situations where engagement is handled robustly, social opposition and project conflicts may still emerge.

- **Regulatory requirements are the floor:** Weaker permitting and regulatory processes do not automatically translate into easier project development with fewer conflicts. Conversely, strong regulatory environments do not automatically earn companies the trust of local stakeholders. Effective trust-building requires going beyond regulatory compliance.

- **Identifying, tracking, and mitigating costs is core business:** To be effective, the identification, quantification, and management of these costs must be integrated across core business units, with appropriate governance and senior accountability. Experience is important at the field level, requiring the ability to connect stakeholder concerns to wider project context and company strategy. The "juniorisation" of community engagement roles without appropriate oversight and connection across core business units can lead to missed opportunities for shared accountability and strategic expectation management.

- **Honesty and transparency, especially about benefits and limitations of renewables, is critical:** Governments and companies should communicate the benefits of renewable energy projects realistically and avoid overstating them to gain local support. Overpromising can lead to unmet expectations, and poor or misleading messaging can fuel opposition rooted in perceived broken promises.

- **Cumulative impacts are a key characteristic of renewables:** Given the diffuse nature of renewables projects, social impacts also need to be managed at the cumulative level. Engagement with peer companies leading neighbouring projects is essential to managing stakeholder expectations and shared accountability. Enhancing communication and partnership across neighbouring projects and sectors will improve collective abilities to take appropriate action and continuously improve.

- **Misinformation about renewables adds complexity:** Green energy projects are increasingly caught in national and international political debates where social risks linked to energy transitions can be used in narratives aimed at maintaining exclusive reliance on fossil fuels. Practitioners reflected on the potential to "weaponise" the social impacts occurring in one part of the renewables value chain in order to stall progress at another point. This can make effective communication and engagement with stakeholders more complex, requiring both "debunking" to correct facts, but also proactive "prebunking" to anticipate potential misinformation tactics.

- **Collective action:** In addition to the management of cumulative impacts as a key cost and impact driver, other segments of the value chain bring their own social risks and therefore potential impacts on the costs experienced at a different part of the value chain. Mining and manufacturing upstream, as well as grid development downstream - all need to actively ensure responsible approaches to extracting, sourcing, building, operation, and end of life - in collaboration with the wider renewables ecosystem.

DISCUSSION THEMES

THE WAYS SOCIAL OPPOSITION AND CONFLICT MANIFESTS

"Green conflict" - social opposition to renewable energy - can take many forms, from low-level tensions between a wind or solar company and local stakeholders through to complete relationship breakdowns or violence to people or property.

Conflictive situations at the site level may arise for a range of reasons, from a lack of trust in new actors entering a community, to mismatched benefits and expectations, targeted misinformation, or other reasons. In the roundtable discussion, it was noted that the term "conflict" was broadly defined for the purposes of the project, but is often understood as involving violence or wider armed use of force unrelated to renewables projects. Some suggested terms such as "opposition" or "grievance" could help avoid such potential misunderstanding.

> The absence of conflict does not mean the absence of impact. Resolving conflict can be more important than the absence of conflict."

Social opposition and conflict are not seen uniformly across the different stages of a renewable energy project. Based on the case analysis presented by IHRB during the dialogue, the project stages that frequently generate the most concern or opposition are early development and construction phases. At the same time, conflicts of different types may arise during operations, closure, or decommissioning as well. It is noteworthy that despite previous due diligence processes by companies, conflicts can still occur across project life cycles, indicating that stakeholder engagement is an ongoing process, not something that is complete at a specific project stage.

Participants agreed that the first step to understanding the costs to companies of the various manifestations of social opposition and conflict is acknowledging that renewable energy projects can have adverse impacts on local communities and their environments. These adverse impacts can range from disputes over land use, to concerns relating to job creation, community health, habitat loss, wildlife impacts, water use, visual and noise pollution, as well as pollution from manufacturing and disposal. Several participants noted the importance of optics and perception around renewables globally - that "green is no longer automatically assumed as good". Therefore, participants agreed that assessing the full range of potential impacts from renewables projects on people and the environment is a principle enabler to more meaningful engagement with affected stakeholders and effective risk mitigation strategies as a result.

> Different players have different risk appetites. Some are there for decades - they develop, operate, and manage. Others come in for one stage - and then leave. Their social conflict can spill over to operational costs for another."

Many also noted the cumulative impacts of the sector, meaning social opposition to a project is not always triggered by the project's activities. Rather, this can stem from the actions or impacts of neighbouring projects, technologies, and industry players, bringing cumulative impacts for companies to consider and manage at the local, national, and even regional level. This affects the range of appropriate actions required by those financing, developing, or operating renewables projects, both in terms of their involvement, but also in terms of managing local perceptions, manifestations, and therefore costs.

Similarly, tensions at the project level may originate from historic conflicts or grievances, including from other industries, such as mining or hydrocarbons. This highlights that social opposition and company-community conflict may have roots in historic experiences, in addition to cumulative experiences. Enhancing communications between project developers on lessons learned and mechanisms to mitigate and respond to conflict can improve company and industry practices.

A TYPOLOGY OF COSTS

The costs companies incur as a result of social opposition and conflict with local communities can be wide-ranging. Costs can be financial - including material damage, additional capital requirements, and cancellations - as well as non-financial - including delays, additional personnel costs, and reputational damage.

> "Renewables margins are super thin. We can't afford conflicts. Humanity also can't afford us not doing the projects because we're screwing things up."

The question of "who should pay the cost of conflict" is central to this research, with wide-ranging opinions amongst public, private, and civil society practitioners. Communities and workers have historically borne the costs of poorly designed and managed projects that ignore or misunderstand local perspectives and needs. Where these have resulted in social opposition and other types of disputes, companies and investors face operational, financial, and reputational consequences. Governments, too, may have to bear the costs of abandoned projects, missed climate action targets, and foregone local infrastructure investments.

The financial impacts of community opposition to renewables projects are arcane, often hidden within company decision making and certainly not in financial reporting. Participants agreed that current financial mechanisms and company budgets are not fit to identify or manage the costs of company-community conflict, especially when attempting to compare the tangible and financial costs (stranded assets or impact of delays) to more abstract ones (community trust and reputational risk).

> "Who's balance sheet? The costs are rarely visible."

Participants highlighted the need across the industry and most renewables companies to better quantify these costs for improved project development, fund allocation, and long-term operability of projects. However, new and better tools are needed to identify and manage these costs at all stages of the project lifecycle, including how to effectively involve the various departments who have a role in managing opposition and conflict situations at different stages.

Unearthing these costs was seen as especially important for ongoing and long-term internal engagement, where investment and risk conversations may ebb and flow over time, as personnel changes, and institutional memory of previous oppositional challenges and conflicts can be short or not even communicated between projects. The value of costings was seen as helpful in building institutional memory about negative incidents and promoting strategies to avoid them in future.

Several participants noted that in addition to the associated costs, the value of investing in meaningful stakeholder engagement and effective conflict mitigation should also be quantified as part of the "investment premium" for well-managed renewable energy developments that have earned and maintained strong social license. These financial and non-financial investments were widely seen to support project operability, and would help companies reduce reputational risks, and increase the possibility of future business opportunities.

> Value protection includes securing future opportunities. It's hard to quantify, but it's definitely there."

Conversely, opposition or conflict that is violent, long-lasting, or well-publicised - can represent significant opportunity costs for current and future developments. This may lead to stranded assets and sunk costs, potentially impacting the ability to secure funding for current and future projects.

Preventing conflict and effectively managing social opposition requires upfront investments to develop meaningful and lasting relationships with communities. The costs of not investing in such measures can also be severe. Participants agreed that early investments in trust-building and risk mitigation do require time - and budget - but are still more cost effective than reactive crisis management, and the operational and reputational consequences.

> The more you do up front the less it costs later."

THE ART AND SCIENCE OF TRUST BUILDING

Human rights due diligence is a well-established approach that the renewables industry should deploy to effectively prevent adverse impacts for workers, communities and other affected stakeholders. This active and ongoing process of risk assessment, risk management, ongoing communication, and iterative tracking, is a key tool for building trust with local stakeholders. This does not come without its complexity, however, particularly given that trust building requires time and patience - which can clash with the urgency of the energy transition and the rapid pace and scale of renewables expansion underway.

> Hiring more liaison officers, creating more benefit funds - all of those are expensive but also not necessarily going to make the difference. It's the HOW you do things that matters."

There is a patchwork of actors involved at each stage of the renewables lifecycle, including large specialist players, larger fossil fuel companies integrating renewables arms to their businesses, many smaller developers, and early and late stage investors bringing with them a variety of infrastructure capital. It was noted that each of these actors are running different risk models at different project stages, and typically due diligence undertaken early in the cycle is often relied on in later stages. This means early-stage efforts to assess risks and engage accordingly are critical, both to ensuring intelligence that cascades down the diligence lifecycle is accurate, and to ensuring misses and mistakes are not baked into the diligence cascade in a way that frustrates different responsible actors' ability to take appropriate action. A deep understanding of local context is therefore essential at the early stage to meaningfully engage with stakeholders and successfully develop renewable energy projects that avoid harms and deliver on local needs.

Several participants noted that the act of communicating complaints to project developers and owners could actually be a positive indication of some level of trust between affected stakeholders and companies involved. Understanding these complaints or grievances can shed light on critical issues early in projects so that they can be managed to avoid escalation, and thereby strengthen the relationships between communities and companies in the process if addressed constructively. In fact, local communities can provide critical insights and feedback regarding environmental and contextual factors that can enhance the project's success and foster long-term trust among stakeholders. Conversely, a lack of stakeholder engagement with project mechanisms might not actually be a sign that there is no opposition, but rather a warning that those impacted do not trust the project or its proponents.

> It's akin to getting married: just because you don't do something bad doesn't mean it will be a good relationship. You can feel it, you know when you have trust."

Conversely, the benefits to local communities of a project's introduction or operations can also become a source of tension and potential conflict if poorly designed, managed, or communicated. Communities may expect job creation, local infrastructure development, and other opportunities that projects might not be able to deliver. Inclusive and transparent mechanisms for communicating with local communities about both the benefits and limits of project opportunities is crucial to preventing conflict and limiting costs associated with community opposition.

The critical role of governments - both as a cause of conflict and an important source of power to prevent it - was raised throughout the dialogue. In terms of governmental influences on due diligence processes, this was seen as critical to shaping the local energy landscape, risk assessment and engagement requirements, and resulting project timelines. However, it was noted that there is often a gap between even the strongest regulatory requirements around consent and the reality of local rights enjoyment. There are therefore limits to the completeness that these local rules and regulations can provide to developers and renewables actors, particularly when it comes to the intangible value of trust-based relationships. Consultation and consent rules vary widely around the world, so it is critical for solar and wind proponents to avoid a one-size-fits-all or tick box approach. Doing so would often miss the opportunity to value perspectives and voices that are often not mandated in formal processes and yet which are critical to the potential for social opposition or conflict to a project.

> Meaningful engagement so critical to valuing other perspectives and voices that are often not mandated in the formal process. You can't get the full picture from technocratic knowledge."

The importance of company culture was emphasised throughout the dialogue. Participants agreed that there is a starkly different state of maturity in most renewables companies between supply chain management versus site level and community management. Procurement is often assigned clear and senior responsibility and resources. Community functions on the other hand often lack clarity over who is responsible for effective management, with the risk that the associated role(s) are "juniorised". Without appropriate governance structures and senior accountability, this can result in a lack of requisite experience and expertise to understand local context as well as the wider landscape of other actors bearing interconnected responsibility. This risks undermining the importance of how to proactively establish shared expectations up front and manage them throughout project lifecycles. It was also noted that the responsibility for identifying, quantifying, and managing costs should not be the siloed responsibility of the sustainability or ESG function, but rather a responsibility across core business units. This lack of resourcing across functions and at appropriate levels of seniority was seen as a potential reflection of corporate cultures failing to value the costs of community opposition, and therefore the company's social license, sufficiently. The solution presented by practitioners was ensuring that social opposition is identified by a company as a principal risk, which then can enable the governance required to strategically delegate roles/responsibilities within the company. It can be the role of sustainability to make that case.

THE POLITICISATION OF GREEN ENERGY

Renewables practitioners are increasingly caught in broader political debates around the future of the global energy system. Many practitioners at the dialogue affirmed that they regularly have to spend time and resources responding to political actors or groups who are deploying certain narratives to delay or derail green energy projects to serve their personal interests. This makes renewable energy projects more vulnerable to political swings and policy changes that may impact their business cycles.

Misinformation, whether politically motivated or not, represents a threat to renewable energy developments, as it can serve to undermine community trust. This is especially true in communities unfamiliar with or having had previous negative experience with renewable energy or other infrastructure projects. Therefore, in addition to the importance of being ready to "debunk" false or misleading information disseminated across local communities, participants noted a need to proactively "pre-bunk" potential misinformation as much as possible (ie anticipate and proactively communicate around potential misinformation areas). Similarly, communities with past adverse experiences involving extractive industries, as well as particularly vulnerable or marginalised communities, or those in areas of cumulative projects, could have a higher risk of being influenced by misinformation.

> Weaponisation of one part of the value chain to the detriment of another - we are all connected, so the response must be as well."

Governments also need to carefully manage the expectations they are creating in their messaging regarding the benefits of renewable energy. Overpromising jobs and community economic opportunities or national cost savings without understanding local realities and the unique business cycles of the renewable energy industry can lead to significant community backlash. Such overstatements can create disillusionment among the public, resulting in skepticism about further renewable initiatives. This is an issue that companies must proactively anticipate and manage in all their operating markets. This challenge can be exacerbated by broader capacity challenges of government, whether that is local governments lacking the expertise or resources to implement robust industrial and energy planning, or the disconnect that can arise between national-level authorities and their subnational counterparts, which companies must navigate in order to ensure clarity and consistency of communications from the many and varied channels communities may engage with.

At the same time, national and local scenarios with more relaxed or weaker policies could be seen as an opportunity to expedite renewable energy permits and allow a faster development of renewable energy projects at the expense of local community needs and rights. However, this approach can foster uncertainties that may lead to community opposition and backlash. Balancing efficient governance with robust stakeholder involvement is crucial to ensure that the growth of renewable energy is not only swift but also socially responsible and sound.

> “Conflict response often means servicing the stakeholders with the time, energy, and access to information to raise issues - those are not actually always the most affected stakeholders in terms of human rights impacts.”

Companies must also understand and balance the reality that there may be cases in which internal community power dynamics are connected to who is raising complaints. It is important to recognise that communicating grievances through formal channels requires a certain amount of time, knowledge, and possibly financial resources. There is a real risk that those most affected by a project may not always have the means to raise formal grievances. In other words, companies must seek to be aware of who is involved in raising complaints and and seek to discern whether their claims are legitimate and representative of where the most severe adverse impacts are occurring. Lack of awareness in such cases can perversely drive internal decision making in ways that may not lead to positive outcomes or may result in improper allocation of resources. This highlights the importance of ensuring risk-based approaches to assessments are taken, focusing on where the company poses the greatest risk of harms to people - rather than responding only to the most vocal opponents or where the company has the greatest perceived control or influence.

THE LIMITS OF COSTING

There is significant utility and value in unearthing and understanding the costs of conflict as a powerful argument for investing in greater preventative approaches. There are also limits to this as well as challenges in quantifying business risks arising from problems or breakdowns in relationships with local communities. This includes challenges in generating reliable data to feed into assessments of costs; the need to distinguish between a company’s investments in human rights due diligence (risk prevention and mitigation) and social investment spend (benefit creation); and the extent to which existing impact assessment processes, risk and commitment registers, and grievance mechanisms effectively capture information about a company’s social risks, including human rights risks.

> Internal conversations ebb and flow. Memories are short. Costs are always useful."

It is critical that any costs identified and communicated support the principles and value of risk prevention and investment in social license, rather than in specific financial figures or metrics. This is because of the difficulties and inherent limitations of quantifications, meaning the methodology behind a figure could become the source of focus and distract from the core objective behind gathering this information in the first place - to change behaviour and to improve a company's relationship with or impact on local stakeholders. This and other research was seen by participants as an important vehicle for equipping financial and operational leaders with evidence that conflict prevention is not just a social imperative but also a financial and strategic one.

> Regimes change, companies stay."

In terms of the appropriate audience to target in communicating these costs, there was strong agreement amongst participants that information should be directed at those making commercial and investment decisions in the company. While social performance leads, ESG departments, and sustainability functions are often the primary internal champions for making such investments, ultimately these costs, and therefore their prevention, must be owned by the Chief Financial or Investment Officer, CEO, Board, and external investors.

> We all benefit when there are high-capacity stakeholders. What you want are partners you can negotiate with. Don't want the system to depend on your presence."

Multiple views were expressed concerning whether governments and policy-makers should be the primary audiences for the COGC project's final research and report outcomes of IHRB's Costs of Green Conflict project. While these actors have important power over impact assessment, engagement, and permitting timelines, and therefore establishing the needed incentives and disincentives for responsible business, they are not the implementing bodies in most cases able to budget, track, and manage the costs associated with stakeholder concerns and disruptions. In addition, given political leadership cycles, several participants noted the transitory nature of government policies around energy. The impetus is on companies investing in long-term assets and operations to ensure they are taking appropriate action, including building strong partnerships with local governments that improves the overall enabling environment for responsible business.

NEXT STEPS

A significant takeaway from the expert dialogue was the need for greater commercial awareness of the manifestations of social opposition and conflict to renewables projects, as well as potential value of developing a typology of costs across company projects, functions, and value chains. These costs—though often hidden—can undermine even the most promising projects. The renewable energy sector has an opportunity to lead by example, learning from the history of extractives industries, and integrating community concerns and human rights due diligence into its ongoing risk management processes at this still early stage of expansion.

Given the extent of cumulative impacts presented by the nature of wind and solar technologies, it is clear that individual but also collective responses will be required to effectively prevent and minimise these costs, and to design a renewable energy system that does not replicate the same structural patterns as the fossil fuel system that have caused significant harms over many decades.

> Because of differing risk appetites, companies have to work together. We have to raise the floor. The industry can't afford to solve climate change just to create other issues in our wake."

As the research continues, the IHRB Costs of Green Conflict project will deepen its inquiry through practitioner interviews and field visit(s) throughout 2025. Stakeholders from across the renewables ecosystem are invited to contribute their perspectives. For more information or to schedule an interview, please contact Amir.Richani [at] IHRB.org. The final output from this research will be published in Q1 2026.

ANNEX

The manifestations of social opposition and conflict to renewable energy projects:

- Procedure-based
  - Environmental opposition
  - Submissions
  - Administrative proceedings
  - Litigation
  - Publicity
- Physical protest
  - Demonstrations
  - Blockades
- Violence to property
  - Damage to private property
  - Damage to public property
- Violence to person(s)
  - Injuries
  - Deaths

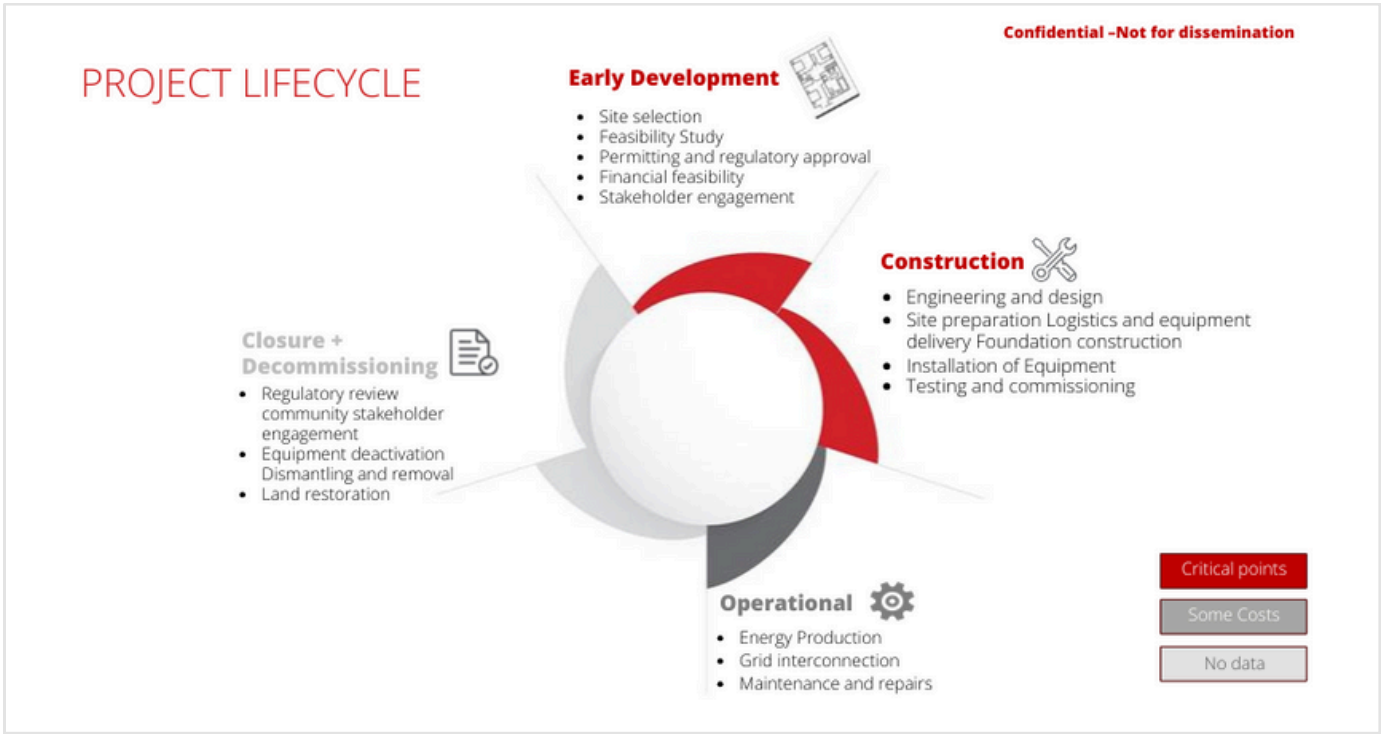
** Building on Davis/Franks "Costs of Conflict" for the hydrocarbon sector (2014)*

Typology of costs that renewables companies can experience due to social opposition and conflict against projects:

- Security
- Project modification
- Risk management
- Material damage
- Lost productivity
- Capital
- Personnel
- Reputational
- Redress
- Delays
- Cancellations

** Building on Davis/Franks "Costs of Conflict" for the hydrocarbon sector (2014)*

Typical renewables project lifecycle and critical points where the costs of conflict most frequently arise:



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Available at:
https://www.ihrb.org/resources/dialogue-insights-understanding-the-costs-of-green-conflict

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Making respect for human rights part of everyday business