



MINING IN THE WESTERN BALKANS

Edited by Vedran Džihic and Marko Kmezić



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CHAPTER 1

CONTESTED EXTRACTION: MINING IN THE WESTERN BALKANS UNDER EU ENLARGEMENT

Vedran Džihic, Marko Kmezić

The European Union stands at a geopolitical and economic crossroads. Over the past decade, the process of EU enlargement, once the Union's most transformative foreign policy instrument and a major pillar of its growth and development, has entered a prolonged phase of stagnation and ambivalence. Enlargement fatigue among several Member States, internal institutional debates, the rise of Eurosceptic and far-right political forces, and internal crises ranging from rule-of-law disputes to migration governance have weakened the credibility and momentum of accession policy. Yet Russia's full-scale invasion of Ukraine in 2022 re-injected strategic urgency into the enlargement agenda. Suddenly, enlargement was once again framed not merely as a normative project of reconciliation and democratic consolidation, but as a geopolitical necessity.

Within this renewed geopolitical context, the Western Balkans – Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, and Serbia – have regained importance in Brussels' strategic thinking. However, this re-prioritization has unfolded alongside a profound transformation of the EU's economic and industrial policy. The green and digital transitions, combined with heightened global power competition, have made access to critical raw materials (CRMs) a strategic priority. Lithium, cobalt, rare earth elements, nickel, and other essential inputs for batteries, renewable energy systems, and digital technologies have become central to Europe's future competitiveness and security. The political economy of mining, once associated primarily with heavy industry and environmental degradation, has re-emerged at the core of European integration, much as coal and steel did in the founding years of the European project.

Historically, control over key resources has shaped geopolitical power. The creation of the European Coal and Steel Community in 1951 was premised on the recognition that coal and steel were the backbone of industrial strength and military capacity. Today, the strategic commodities have changed, but the underlying logic remains similar. Critical raw materials underpin electric vehicles, wind turbines, hydrogen technologies, and advanced defense systems needed for European countries as a guarantee of their security and geopolitical relevance. In this context, the EU's 2023 Critical Raw Materials Act (CRMA) represents a major structural shift: from market-driven resource acquisition towards strategic industrial policy and supply chain securitization. The Act sets benchmarks for domestic extraction, processing, and recycling capacities while explicitly promoting "strategic partnerships" with third countries including the Western Balkans.

The Western Balkans, as candidates and potential candidates for EU membership, occupy a particularly sensitive position in this emerging resource landscape. The region possesses significant mineral potential, including lithium deposits in Serbia and Bosnia and Herzegovina, bauxite and other minerals in Bosnia and Herzegovina, nickel and cobalt in Albania and Kosovo, important resources in Montenegro and North Macedonia, and other strategic minerals. These deposits have attracted growing interest from multinational corporations and European policymakers alike. Mining projects that had long been economically marginal are now being reframed as important pillars of Europe's green transition and strategic autonomy.

This evolving dynamic raises fundamental questions about the nature of EU enlargement and the balance between the EU's values and strategic and economic interests. The EU has traditionally portrayed itself as a normative power, promoting democracy, rule of law, environmental standards, and participatory governance through conditionality. EU membership is still seen as a guarantee for stability, democracy and peace, even though in recent years the process has been slow and cumbersome. The general trend amongst populations in all countries shows a clear commitment to EU membership, with public approval rates over 70%. The only exception is Serbia, where this number has dropped below 50% over the past decade, due to an anti-Western campaign in media controlled by the regime and the EU's lack of criticism of state capture by the ruling party. A substantial share of citizens across the Western Balkans, however, no longer believe in their countries' EU membership in the foreseeable future. Beyond this, more recently, tensions between European norms and principles on the one hand and geopolitical-economic imperatives on the other have become increasingly visible. Most notably in Serbia, though not uniquely so, democratic backsliding, media capture, and shrinking civic space have raised serious concerns. At the same time, the EU's strategic considerations including energy diversification, migration management, and now increasingly access to critical raw materials, have elevated the geopolitical importance of these same governments.

The goals and urgencies related to the European Green Deal, and particularly the Critical Raw Materials Act, bring the region of the Western Balkans into the spotlight much beyond enlargement, as the region is set to provide the EU with critical raw materials to contribute to the green transition and secure its independence from other global competitors. In a region with widespread and well-documented state capture, corruption and weak state institutions,¹ mining plans raise fears among the population, with regard to negative externalities such as climate change, deforestation/habitat destruction, water pollution, soil erosion, and the loss of biodiversity. In addition, there is a serious concern that large-scale mining projects might lead to even more corruption and clientelism, and a further centralization of political and economic decision-making, ultimately entrenching the existing state capture and authoritarian tendencies.²

The case of Serbia's Jadar lithium project illustrates all these contradictions vividly. The planned extraction of lithium by the multinational corporation Rio Tinto in the Jadar Valley sparked substantial public protests and environmental mobilizations over the last few years.

¹ Biepag. (2021). Beyond stabilitocracy: Unveiling the rise of autocracy in the Western Balkans. Retrieved from <https://www.biepag.eu/publication/beyond-stabilitocracy-unveiling-the-rise-of-autocracy-in-the-western-balkans> and Bieber F. (2019). The rise of authoritarianism in the Western Balkans, Palgrave MacMillan, 2019. Compare also Democratization Policy Council. (2021). Sell out, tune out, get out, or freak out? Retrieved from <http://www.democratizationpolicy.org/sell-out-tune-out-get-out-or-freak-out/>

² Compare here existing literature: Prelec T. (2020). The vicious circle of corrosive capital, authoritarian tendencies and state capture in the Western Balkans, *Journal of Regional Security*, vol. 15/2, P. 167-198 and PSSI. (n.d.). Eco-monsters, eco-fighters: China's investments in Serbia's heavy manufacturing industry as seen through an environmental lens. Retrieved from <https://www.pssi.cz/publications/39-eco-monsters-eco-fighters-china-s-investments-in-serbia-s-heavy-manufacturing-industry-as-seen-through-an-environmental-lens>

The project became a symbol of wider anxieties: environmental degradation, limited transparency, perceived elite capture, and fears that European industrial interests were overriding local democratic participation and colluding with authoritarian power structures. Although the Rio Tinto project has been on hold for the time being, it remains emblematic of the broader strategic alignment between EU industrial policy and candidate-country resource development. Memoranda of understanding between EU institutions and Serbian authorities, as well as the inclusion of projects in strategic frameworks under the CRMA, signal Brussels' strong interest in securing lithium supply chains close to home.

This interest is not limited to EU institutions alone. Key Member States, notably Germany, have actively supported resource partnerships in the region, reflecting the interdependence between European automotive industries and battery supply chains. The electrification of mobility – central to the European Green Deal – currently relies heavily on lithium-ion battery production. Europe currently lags considerably behind China in both battery manufacturing and raw material processing capacities. China dominates global processing of rare earth elements and holds leverage in global supply chains, while Australia and Latin American countries account for substantial shares of lithium extraction. This concentration of supply has heightened European vulnerability perceptions and reinforced the drive for diversification and “de-risking.”

China's own strategy underscores the geopolitical dimension of raw materials. Through long-term investments, infrastructure financing, and vertically integrated supply chains, Beijing has consolidated a dominant position in global mining and processing. In the Western Balkans, Chinese companies have invested in copper mines in Serbia and other extractive ventures, often linked to the Belt and Road Initiative but in general to the global ambitions of the Chinese government. Mining resources thus become instruments within a broader geoeconomic competition. For the EU, failing to secure reliable access to CRMs could undermine industrial competitiveness, climate ambitions, and strategic autonomy.

Against this backdrop, enlargement policy is increasingly intersecting with industrial and security policy. The Western Balkans are no longer viewed solely through the lens of post-conflict stabilization or democratic transition, but also as potential nodes within European supply chains. This functional integration may precede or even partially substitute full political integration. Infrastructure connectivity, energy interdependence, and industrial cooperation are being accelerated, while accession negotiations remain slow and politically contested – with the notable exceptions of Albania and Montenegro, currently the most promising EU-enlargement countries and frontrunners in the process.

This duality produces ambivalent incentives for candidate countries. On the one hand, alignment with EU standards, particularly environmental acquis, state aid rules, and public procurement norms, remains formally required – merit-based principle is still valid. On the other hand, the strategic value of mineral resources may create leverage for governments that can position themselves as indispensable partners. Where democratic oversight is weak, such a dynamic risks reinforcing executive dominance and limiting public scrutiny of large-scale extractive projects. Environmental and social impacts of mining including water contamination,

land expropriation, biodiversity loss, air pollution, and similar impacts are highly sensitive in regions already marked by fragile ecosystems and post-industrial legacies.

Moreover, mining governance in the Western Balkans often suffers from institutional weaknesses, limited transparency, and contested property rights. The influx of foreign direct investment into extractive sectors can generate macroeconomic benefits such as export revenues, employment, and infrastructure development, but may also exacerbate the risk of corruption and clientelism, increase social inequalities, and diminish the already weak avenues for citizens' democratic participation. Without robust regulatory frameworks and effective civil society participation, the pursuit of critical raw materials could undermine precisely those democratic standards that EU enlargement policy is meant to promote.

The EU thus faces a structural dilemma. If it prioritizes rapid access to resources and supply chain security, it risks diluting its normative credibility and reinforcing perceptions of double standards. If it insists on stringent democratic and environmental conditionality, it may slow down projects deemed essential for the green transition and strategic autonomy. The challenge lies in reconciling industrial pragmatism with normative commitments, a challenge where the EU so far has not delivered a convincing answer.

This study situates mining and critical raw materials in the Western Balkans within this broader geopolitical and institutional transformation. It combines analytical insights into two interrelated dimensions: a) the evolving role of the European Union (through legislative instruments such as the Critical Raw Materials Act, bilateral memoranda, strategic partnerships, and enlargement conditionality) in shaping resource governance in candidate countries, and b) local constellations, dynamics, controversies and impact of existing and planned mining projects across the region including their political, societal, geopolitical, economic, and environmental implications.

By bridging EU-level policy analysis with on-the-ground developments in the Western Balkans, the study aims to illuminate the concrete interactions between Brussels' strategic ambitions and local realities. It asks whether the new resource-driven geopolitics of enlargement marks a departure from the EU's traditional normative paradigm, or whether it can be integrated into a renewed, credible enlargement strategy that strengthens both European resilience and democratic governance in the region.

METHODOLOGY

The study adopts a qualitative, multi-method research design that integrates desk-based analysis with extensive fieldwork and primary data collection. This approach was chosen to ensure both breadth and depth in examining mining projects, their governance, and their socio-environmental implications across different national and transnational contexts. The methodology is structured in sequential but interrelated phases, allowing for iterative refine-

ment of research questions, tools, and analytical focus. The first phase of the project, conducted during the initial two months, consisted of a comprehensive desk review of relevant literature and documentation. This included peer-reviewed academic publications, policy papers, and primary documents produced by national governments, EU institutions, and private companies engaged in mining activities. In addition, the research incorporated media coverage and social media content to capture public discourse, emerging controversies, and real-time developments. This phase served several key purposes. First, it enabled the identification of existing knowledge gaps and informed the conceptual framing of the study. Second, it supported the development of a structured analytical framework, including core thematic dimensions. Finally, it facilitated the design of data collection instruments, including interview guides and focus group protocols, ensuring alignment between theoretical concerns and empirical inquiry. Building on the desk review, the research team developed a comprehensive and standardized mapping of identified mining projects. The resulting dataset provided a fact-based and critical overview of the phenomenon, capturing key attributes of each project, including location, ownership structures, investment sources, regulatory context, and reported socio-environmental impacts.

The second phase of the project focused on qualitative fieldwork conducted throughout 2025. The research design emphasized in-depth, context-sensitive data collection across multiple sites. Field visits were carried out in North Macedonia (May 19–23, 2025) and Montenegro (May 27–30, 2025), followed by research activities in Bosnia and Serbia (June 16–19, 2025). These visits combined semi-structured interviews and focus groups, allowing for both individual and collective perspectives to be captured. To complement field-level insights, the project included targeted research visits to Berlin and Brussels (October 13–16, 2025). These focused on engaging with European Union institutions, international organizations, and other relevant stakeholders operating at the national and supranational level. This component was essential for situating local and national dynamics within broader governance frameworks and policy processes.

Semi-structured interviews were conducted with a diverse range of stakeholders, including government representatives, corporate actors, civil society organizations, activists, and subject-matter experts. This format allowed for both consistency across interviews and flexibility to explore context-specific issues in depth. Focus groups were systematically used in affected communities, namely in Loznica (Serbia) and Tuzla (Bosnia and Herzegovina) to capture collective experiences, perceptions, and forms of mobilization. Focus groups were conducted using semi-structured discussion guides, allowing for consistency across cases while maintaining flexibility to adapt to local contexts. Participants were selected through purposive and snowball sampling to ensure diversity of age, gender, occupation, and positionality in relation to mining projects (e.g., supporters, opponents, and those undecided or indirectly affected). These discussions provided valuable insights into local dynamics, including community-level responses to mining projects, perceptions of risks and benefits, and patterns of citizen engagement and protest. The group setting also facilitated the emergence of shared narratives and points of contention that may not be as visible in individual interviews.

While the multi-method approach strengthens the overall robustness of the study, certain limitations should be acknowledged. Access to some stakeholders, particularly corporate actors in the automobile industry and government officials, was uneven across cases. Despite this observation, the integration of desk research, systematic mapping, and multi-sited qualitative fieldwork provided a comprehensive and empirically grounded basis for analysis. The methodological approach ensures that the study captures both structural dimensions and lived experiences, offering a nuanced understanding of mining projects and their implications across different contexts.

Ultimately, this methodological approach allowed us to hypothesize that the politics of critical raw materials may prove as transformative for the EU's future as coal and steel once were. Whether this transformation reinforces European unity and values or deepens internal and external contradictions will depend on how the Union navigates the delicate balance between interests and principles in its immediate neighborhood.

CONTEXTUAL OVERVIEW OF MINING IN THE WESTERN BALKANS: MAJOR DEBATES

Contemporary scholarly literature on mining in the Western Balkans leans primarily on the well-established scholarship on Green extractivism in European rural areas³, and in particular in countries and regions previously exposed to lithium probes and extraction.⁴ According

³ See for example del Mármol, C., & Vaccaro, I. (2020). New extractivism in European rural areas: How twentieth first century mining returned to disturb the rural transition. *Geoforum; Journal of Physical, Human, and Regional Geosciences*, 116, 42–49. <https://doi.org/10.1016/j.geoforum.2020.07.012>; Dunlap, A., & Riquito, M. (2023). Social warfare for lithium extraction? Open-pit lithium mining, counterinsurgency tactics and enforcing green extractivism in northern Portugal.

⁴ See Fjellheim, E. M. (2023). ““You Can kill us with dialogue.” critical perspectives on wind energy development in a Nordic-Saami green colonial context. *Human Rights Review*, 24(1), 25–51. <https://doi.org/10.1007/s12142-023-00678-4>; Murrey, A. (2015). Narratives of life and violence along the Chad-Cameroon oil pipeline. *Human Geography*, 8(1), 15–39. <https://doi.org/10.1177/194277861500800102>; Noever Castelos, C. (2023). Mining out of the crisis? The role of the state in the expansion of the lithium frontier in extremadura, Spain. *The Extractive Industries and Society*, 15, 101329; Núñez, A., Benwell, M. C., & Aliste, E. (2022). Interrogating green discourses in Patagonia-Aysén (Chile): Green grabbing and eco-extractivism as a new strategy of capitalism? *Geographical Review*, 112(5), 688–706. <https://doi.org/10.1080/00167428.2020.1798764>; Riofrancos, T. (2023). The security–sustainability nexus: Lithium onshoring in the Global North. *Global Environmental Politics*, 23(1), 20–41. https://doi.org/10.1162/glep_a_00668; Svampa, M. (2015). Commodities consensus: Neoextractivism and enclosure of the commons in Latin America. *South Atlantic Quarterly*, 114(1), 65–82. <https://doi.org/10.1215/00382876-2831290>; Tornel, C. (2024). Development as terracide: Sacrifice zones and extractivism as state policy in Mexico. *Globalizations*, 1–25. <https://doi.org/10.1080/14747731.2024.2424075>; Andreucci, D., & Radhuber, I. M. (2017). Limits to “counter-neoliberal” reform: Mining expansion and the marginalisation of post-extractivist forces in Evo Morales’s Bolivia. *Geoforum; Journal of Physical, Human, and Regional Geosciences*, 84, 280–291. <https://doi.org/10.1016/j.geoforum.2015.09.002>; Anlauf, A. (2016). Greening the imperial mode of living? Socio-ecological (in) justice, electromobility, and lithium mining in Argentina. In M. Pichler, C. Staritz, K. Küblböck, Ch. Plank, W. Raza, & F. Ruiz Peyré (Eds.), *Fairness and justice in natural resource politics* (pp. 176–192). Routledge; Bruna, N. (2022). Green extractivism and financialisation in Mozambique: The case of Gilé National Reserve. *Review of African Political Economy*, 49(171), 138–160.

to key authors, both mining and development involve disruption, movement, and change – of people, environments, social relations, and ideas about the future. By focusing on these foregrounds, the authors analyze environmental discourses and socio-ecological (in)justice in their respective geographical domains. Together, they paint a vivid picture of extractivism traditionally concentrated in the Global South for the benefit of the Global North. However, more recent texts highlight the dynamics of evolving resource extraction, moving some environmental and social burdens closer to powerful economic and political hubs. The green transition is shifting extractive pressures toward regions closer to today's geopolitical centers, including to the countries on European continent, and in particular the Western Balkans EU candidate countries. Based on this notion, we explore three strands of academic texts dealing with mining in the Western Balkans.

The first strand of scholarly literature on mining in the Western Balkans deals with construction of legitimacy in the stage of pre-extraction debate, civic activism, refusal of affected local communities and protest culture. One of the central challenges in this field lies in the entrenched mutual distrust between citizens and state institutions, accompanied by a persistent lack of substantive public deliberation on key societal issues. As observed in the publication edited by the Heinrich Böll Foundation (2024),⁵ such a condition can be understood as a structural consequence of prolonged authoritarian governance, which has eroded institutional legitimacy and weakened participatory political processes. Consequently, Nina Đukanović⁶ analyzes resistance against the Jadar lithium project in Serbia through dual lenses, namely what she refers to as the “monolithization of the green transition,” with corporations and states alike using the climate crisis as an opportunity for profit, economic growth, and, increasingly, militarization, and, secondly, the politics of refusal as central to the analysis of grey extractivism and resistance to green extractivism. Although focusing on a single case study, the article offers a convincing argument that the climate emergency is being framed in a way that supports mining and extractivism under the guise of sustainability, thereby limiting critical debate and dissent within a local community. Rajković and Vasiljević (2025)⁷ explore “environmental reverberations” as ways in which environmental conflicts illuminate historical, social, and ecological dynamics in the Balkans and challenge conventional readings of the region's past and present. Their research shows how new challenges, stemming from the potential mining project in the border region between Serbia and Bosnia and Herzegovina, can provide fresh interpretations of troubled regional histories and classical notions such as Balkanism. Furthermore, the role of disinformation in the energy transition is elaborated by Poplawska (2025)⁸ who critically examines how the Jadar lithium mining project is discursively legitimized in the documentary ‘Not in My Country’ – a film co-developed and financed by the

⁵ Heinrich Böll Foundation. (2024). The Raw Materials Situation in Neighboring European Countries: Bosnia and Herzegovina, Serbia, Georgia, Armenia. <https://www.boell.de/sites/default/files/2024-10/e-paper-the-raw-minerals-situation.pdf>.

⁶ Djukanović, N. (2026). Refusal of lithium mining in Serbia: exploring post-green extractivism. *Globalizations*, 1–20. <https://doi.org/10.1080/14747731.2025.2597562>.

⁷ Rajković, I., & Vasiljević, J. (2025). Ghosts, Rewilded: Environmental Reverberations in the Balkans. *East European Politics and Societies*, 39(4), 921–938. <https://doi.org/10.1177/08883254251401598>.

⁸ Poplawska, K. (2025). “Serbia's lithium dilemma”? Exploring the construction of legitimacy in the stage of pre-extraction debate and public contestation. Lund University. <https://lup.lub.lu.se/student-papers/search/publication/9194354>.

University of Leuven. The findings critique the film for presenting a single, top-down narrative of sustainability, which limits resistance and debate on how a genuinely sustainable future might be achieved.

The second strand of literature engages with the Western Balkans as part of the EU enlargement process. In the context of the Western Balkans, EU enlargement serves as a vehicle for Europeanisation, influencing governance, environmental standards, and socio-economic development beyond EU borders. Stuehlen and Anderl (2024)⁹ identify the EU as a key actor in the conflict alongside local government and community, positioning it as an additional target of opposition for the anti-lithium movement in Serbia. The article shows how the EU accession process creates tension between committing to green policies and opening markets to foreign investment, limiting the agency of both government and protest movements, while ultimately benefiting multinational corporations in the long term. The authors suggest that unless Serbian protest movements develop sustained, informed, and transnational strategies that leverage structural weaknesses within the EU, growing power imbalances will make resisting transnational corporations in environmental conflicts increasingly futile. EU's involvement in the Serbian lithium mining sector is further researched by Kinell (2025)¹⁰ who hypothesizes that the EU behaves in a "normal" power way (interest-driven) rather than purely normative. In other words, insisting on full compliance with Green Deal standards in the case of the lithium deal with Serbia might have jeopardized the EU's strategic goals, so the EU appears to have chosen strategic autonomy over enforcing its normative criteria. Similarly, but with much more critical stance towards the EU, Ćemalović, Ćurčić and Igrutinović (2025)¹¹ demonstrate how in Serbia – an EU candidate country - economic and strategic interests in lithium extraction may override the EU's own environmental and legal standards. In short, the paper argues that despite formal environmental requirements, the EU appears willing to subordinate its legal norms to broader strategic and economic goals when it comes to securing critical minerals. This thesis is largely corroborated by a 2025 study prepared by the Friedrich Ebert Stiftung, which criticizes the European Union for its pragmatic departure from fundamental reforms and democratic governance as core preconditions for accession progress. The study argues that this shift reveals a growing tension between the EU's declared commitment to conditionality and its geopolitical priorities.

Finally, the third strand of literature emphasizes that mining of critical raw materials is not merely an economic or environmental issue, but a geopolitical one. In response to China's dominance in the field, the EU is working on securitizing critical mineral supplies, while addressing potential environmental and socio-economic challenges associated with increased

⁹ Stuehlen, C., Anderl, F. Transnational companies in environmental conflicts: Rio Tinto, anti-mining resistance in Serbia, and the contradictions of Europeanization. *Zeitschrift für Friedens- und Konfliktforschung* 13, 243–268 (2024). <https://doi.org/10.1007/s42597-024-00114-5>.

¹⁰ Kinell, T. (2025). Mining for Influence: The EU's Strategic Framing of Lithium Extraction in Serbia. (BA Thesis, Stockholm University). <https://www.diva-portal.org/smash/get/diva2:1953593/FULLTEXT01.pdf>.

¹¹ Ćemalović, U., Ćurčić, S., & Igrutinović, M. (2025). Environmental contradictions in the EU accession process: lessons from a lithium mining project in Serbia. *Journal of Energy & Natural Resources Law*, 1–18. <https://doi.org/10.1080/02646811.2025.2592206>.

industrial activities. Building on security studies and critical geography, the authors examine global competition over extraction in the Western Balkans. Once again focusing solely on the Jadar project, the study prepared by Vivoda and Loginova (2025)¹² highlights the difficulty of balancing security and sustainability in a complex geopolitical and domestic context. The authors signal Serbia's intricate position between the EU and outside actors like Russia and China, combined with governance problems and public distrust, which renders successful management of the project particularly challenging. Thus, notwithstanding geopolitical reality, the study signals the issue of good governance as a key condition for advancing the lithium project responsibly and bridging the socio-political divides that currently hinder its development. Đukanović (2025)¹³ adds to the field by demonstrating how changing geopolitical relations under the urgency of the climate crisis and the state of exception invoked by the green transition led to renewed pressure on mining and the expansion of extractivist logic across the globe, including in Serbia. Finally, geopolitical pressures in the battle over critical raw materials also significantly undermine domestic political contestation, as Ibraković (2025)¹⁴ shows in the case of Bosnia and Herzegovina. Local politicians, operating under the influence of competing global powers, often tailor their policies to appear most attractive to external actors. However, this competition rarely serves the public interest, as politicians prioritize their own political survival and economic gain over long-term national development.

What emerges from this comprehensive review of the most recent literature on mining in the Western Balkans is the clear need for a broader comparative perspective. While existing scholarship offers valuable insights into the political, environmental, and geopolitical dimensions of mining, it focuses predominantly on single-country case studies, most notably Serbia, where the lithium project has taken center stage. As a result, knowledge of mining developments across the Western Balkans remains geographically confined and analytically fragmented.

Notably, two recent policy studies stand out as they pioneer regional approach to the matter. The first is the BiEPAG study (2025),¹⁵ which linked mining activities to the lack of democracy and weak rule of law in the Western Balkans. BiEPAG identified state capture in the region as a significant issue, noting that potential financial gains from critical raw material extraction could instead reinforce mechanisms of state capture, including the risk of state capture being transferred abroad. Second, ELIAMEP (2025)¹⁶ highlights the region's attractiveness for the EU

¹² Vivoda, V., Loginova, J. Lithium at the crossroads: geopolitical, economic, and socio-environmental complexities of the Jadar project in Serbia. *Miner Econ* 38, 665–681 (2025). <https://doi.org/10.1007/s13563-025-00517-7>.

¹³ Djukanović, N. (2025). Between peripheries and solidarities: Resisting green extractivism in Serbia. *East European Politics and Societies*, 39(4), 939–959. <https://doi.org/10.1177/08883254251403412>.

¹⁴ Ibraković, M. (2025). Critical Raw Materials: Dispatch from Bosnia and Herzegovina. Friedrich-Ebert-Stiftung Dialogue Southeast Europe. <https://collections.fes.de/publikationen/content/titleinfo/1945160>.

¹⁵ Džihić, V. (2025). Mining in the Western Balkans - The Rise of Dangerous Transactionalism. BiEPAG. <https://www.biepag.eu/publication/mining-in-the-western-balkans-the-rise-of-dangerous-transactionalism>.

¹⁶ Krstinovska, A, and Wolf, A. (2025). Raw Materials for a Resilient Europe: The EU's Strategic Partnership with the Western Balkans. ELIAMEP. <https://www.eliamep.gr/en/raw-materials-for-a-resilient-europe-the-eus-strategic-partnership-with-the-western-balkans/>.

to ensure a resilient EU integration strategy and ever-closer integration with a full membership perspective in mind.

Building on these studies, we argue that only a comparative approach makes it possible to move beyond generalized claims and instead identify how institutional structures, political economies, and societal responses shape mining outcomes in distinct national contexts. Moreover, this study starts from a premise that mining in the region is increasingly embedded in broader geopolitical and economic dynamics, particularly in relation to the EU's Critical Raw Materials Strategy. By systematically comparing cases within the Western Balkans, we can better assess whether EU engagement promotes regulatory convergence, strengthens environmental standards, or, conversely, reinforces existing democratic deficits. Finally, as discussed above, mining projects frequently generate social conflict, environmental concerns, and debates about sustainable development models. Comparative research thus helps explain why similar projects provoke intense resistance in some contexts but not in others.

STOCKTAKING OF EU FRAMEWORKS: LEGAL AND POLICY OVERVIEW

Mineral-based unrefined, natural resources serve as fundamental inputs for producing a wide array of finished products. Consequently, they are vital to the EU, as they are for any other global economy. Reliable and uninterrupted access to certain raw materials is an increasing concern both within the EU and worldwide. To tackle this issue, the European Commission has developed a list of critical raw materials (CRMs) for the EU, which is regularly reviewed and updated. CRMs encompass raw materials that are both crucial to the EU economy and carry substantial supply-related risks.

The EU's industry and economy are reliant on international markets to provide access to many important raw materials since they are produced and supplied by third countries. Critical raw materials are confronted with a growing global demand, driven by the decarbonization of economies. To answer this challenge, the EU has developed a comprehensive Raw Materials Act.¹⁷ It aims at strengthening all stages of the European critical raw materials value chain, specifically highlighting the EU's resolve to 'pursue these objectives in cooperation with third countries through mutually beneficial partnerships, with a view to promoting their own economic development in a sustainable manner'.

¹⁷ Regulation (EU) 2024/1252 of the European Parliament and of the Council of April 11, 2024 establishing a framework for ensuring a secure and sustainable supply of critical raw materials and amending Regulations (EU) No 168/2013, (EU) 2018/858, (EU) 2018/1724 and (EU) 2019/1020. Official Journal of the EU. (April 11, 2024). https://eur-lex.europa.eu/legal-content/EN/TX/T/?uri=OJ:L_202401252.

¹⁸ European Commission: Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, Strategic project – Jadar project, Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2873/8576432>

To facilitate the implementation of the CRMA, the EU has in 2025 prepared a list of 47 strategic projects within the EU and 13 strategic projects outside of the EU, including the Jadar extraction project in Serbia.¹⁹ The Jadar project, projected by the EU to start production in 2030, would according to the document produce up to 58,000 tonnes of lithium carbonate, which corresponds to 18-26% of EU forecasted demand, as well as 286,000 tonnes of boric acid and 259,000 tonnes of sodium sulfate, annually. Apart from this single mega-project, the Western Balkans retain considerable reserves of essential raw materials including copper, nickel, bauxite, antimony, and rare earth elements.

In short, the EU is not directly involved in mining in the Western Balkans. Instead, it is strategically engaging in mining-related investment and partnerships, especially for critical minerals such as lithium. A clear illustration of this practice is the 2024 Strategic Partnership on raw materials, batteries and value chains between the European Commission and Serbia. In this document, the EU is actively pushing policies that combine extraction with processing, environmental standards, and integration into European industrial value chains. However, balancing local socio-environmental concerns with EU supply chain goals, requires strong independent institutional oversight, a robust domestic regulatory framework, and transparency.

It is precisely these elements that the EU has frequently criticized as being insufficient in the Western Balkans. Among experts and wider population alike, there is considerable concern that large-scale mining projects boosted by the EU support might lead to even wider scale corruption and clientelism, and a further centralization of political and economic decision-making, ultimately entrenching the existing state capture and increasing authoritarian tendencies.

Since 2003, the countries of the Western Balkans have been regarded as candidate countries for accession to the EU. At this point, they are at different stages of the accession process, with each country being assessed annually by the European Commission through regular Progress Reports evaluating their level of alignment with EU values, legislation, and policies. However, drawing on the established concept of stabilitocracy²⁰ – a form of governance that prioritizes ‘stability’ over democratic standards, often tolerated by external actors who favor regional control and short-term gains over substantive liberal reforms – critics argue that the EU’s intensified pursuit of raw materials in the Western Balkans could further weaken the region’s values- and norm-based trajectory toward EU integration. Starting from this premise, and acknowledging that weak domestic institutions are the single greatest obstacle due to various reasons (i.e. authoritarian rule in Serbia, fragmented government in Bosnia and Herzegovina, limited regulatory capacity in North Macedonia, and administrative problems in Montenegro), this study examines critical raw materials and EU enlargement as interconnected, rather than

¹⁹ EU and Serbia sign a memorandum on raw materials with lithium mine in sight. EWB. (July 19, 2024). https://european-westernbalkans.com/2024/07/19/eu-and-serbia-sign-a-memorandum-on-raw-materials-with-lithium-mine-in-sight/?utm_source=chatgpt.com.

²⁰ Kmezić, M., Bieber, F. (eds). The Crisis of Democracy in the Western Balkans. An Anatomy of Stabilitocracy and the Limits of EU Democracy Promotion, BiEPAG (2017). <https://www.biepag.eu/wp-content/uploads/2021/07/TheCrisisofdemocracy.pdf>.

as two separate tracks, and argues that such an approach should be translated into EU's policy towards the region.

A STOCKTAKING OF SELECTED WESTERN BALKAN STATES: BOSNIA AND HERZEGOVINA, SERBIA, MONTENEGRO, AND NORTH MACEDONIA

The Western Balkans is a resource-rich European region with a strong mining tradition and some level of integration into EU trade and transport networks, making it well positioned to support the EU's critical raw materials diversification goals. The region also holds significant secondary raw materials including copper, lead, zinc, nickel, and lithium from legacy industrial sites and mine tailings, which, if sustainably recovered, could provide substantial mutual benefits.

Bosnia and Herzegovina

Bosnia and Herzegovina (BiH) has a long-standing mining tradition rooted in its geologically diverse terrain. At the core of BiH's mining sector are base and precious metals, particularly lead, zinc, copper, and iron. The country's trade is heavily integrated with the EU market, particularly in aluminum and related materials. Around 85–100% of processed metals such as aluminum, copper, and nickel are exported to the EU.²¹

More strategically, BiH hosts several resources identified by the EU as critical and strategic raw materials, including bauxite, cobalt, antimony, nickel, lithium, magnesium, boron, and barium. Although not formally part of the EU raw materials initiatives, BiH is experiencing a quiet surge in exploration projects with at least a dozen CRM-related activities, ranging from early geological surveys to preparatory work.²²

Apart from the existing bauxite industry in the Milići mine, the first in the Republika Srpska to receive a government concession for state-owned mines in 2003, recent exploration has identified additional opportunities in proposed magnesium 'green' production complex in Kupres aiming to extract dolomite and produce up to 15,000 tonnes of magnesium annually over a projected 75-year lifespan.²³ In eastern Bosnia, exploration has identified substantial lithium carbonate, magnesium sulfate, and boron deposits in the Majevisa region.²⁴ Plans were de-

²¹ ELIAMEP (2025).

²² Spotlight on mining in the Western Balkans, EWB (November 20, 2025). <https://europeanwesternbalkans.com/2025/11/20/spotlight-on-mining-in-the-western-balkans/#:~:text=Although%20not%20formally%20part%20of,substantial%20social%20and%20psychological%20legacies..>

²³ The Germans will build a large industrial Complex in BiH. Sarajevo Times (January 11, 2024). <https://sarajevotimes.com/the-germans-will-build-a-large-industrial-complex-in-bih/#:~:text=The%20company%20%E2%80%9CBH%20Magnezij%20&%20Minerali,dolomite%20for%20future%20magnesium%20production>

²⁴ Lithium under Majevisa: Will mining begin in Republika Srpska?. Vreme (December 16, 2023). <https://vreme.com/en/drustvo/litijum-ispod-majevice-hoce-li-kopanje-poceti-u-republici-srpskoj/>.

veloped for the exploration of lithium in Lopare by the Swiss Arcore company. The company ran explorations in Central and Eastern Bosnia and, based on preliminary prospecting results, announced that the Lopare project has the potential to become one of the largest mines of its kind in Europe. Plans for the exploitation of nickel, zinc and lead have been drawn up for the Ozren mountain area in Bosnia by the Australian company Lykos Balkan Metals. In both cases, the local population and activists organized resistance against the project, criticizing the anticipated severe environmental impacts and the non-transparent and non-inclusive manner in which local authorities have continued to forge mining partnerships with companies, including plans to operationalize them.²⁵

Additional CRM prospects include the cobalt deposit at Brezik-Tadići, characterized by high-grade laterite ore, and the antimony site at Čemernica, currently in exploration. Nickel resources at Vardište, estimated at 67 million tonnes, reinforce the country's potential contribution to battery and stainless-steel supply chains.²⁶ However, most of these projects remain under-explored or stalled due to regulatory uncertainty and very strong local opposition driven by environmental concerns.

Indeed, the principal constraints on mining expansion in BiH are governance-related. Weak transparency, limited public information, corruption, dysfunctional multi-ethnic governance structures, inadequate infrastructure, and the absence of a comprehensive national mining strategy undermine investor confidence. Public mistrust, fueled by environmental concerns and illegal activities, including water contamination, deforestation, illegal quarrying, and a fatal landslide in Donja Jablanica in 2024²⁷, has further complicated project development.

Montenegro

Mining development in Montenegro is undergoing a strategic shift, balancing its traditional heavy reliance on coal and bauxite against efforts to modernize, attract foreign investment in critical minerals, and align with European Union environmental standards. The sector is focused on reopening closed mines, increasing efficiency in existing operations, and exploring new metallic resources.

While Montenegro's mineral reserves are comparatively small, their strategic relevance is underscored by Europe's demand for aluminum, bauxite, lead, zinc and barite, all geologically deposited in the country. The mining sector employs around 5,000 workers, including those in mineral extraction and technical roles. There are 53 ongoing concessions for geological research and resource exploitation.²⁸

²⁵ "Lefteast (2023). Bosnia: International companies wreak havoc on the environment, April 10, 2023. <https://lefteast.org/bosnia-international-companies-wreak-havoc-on-the-environment/>

²⁶ Giannakopoulou, S, Adam, K. (2021). Mapping of the available business opportunities in the ESEE region. RESEERVE. Mineral potential of the ESEE region. https://reseerve.eu/upload/files/D.6.1_RESEERVE_website%20version_FINAL_MR.pdf.

²⁷ Bosnian Village Buries 19 People Killed in Floods, Landslides. *Radio Free Europe*, October 15, 2024. <https://www.rferl.org/a/bosnia-flooding-storm-burials-funerals-jablanica/33159773.html>.

²⁸ Interview with Montenegro's Minister of Energy and Mining, Podgorica, May 2025.

Red bauxite mining is a major industry around Nikšić, which hosts one of Europe's largest deposits with estimated reserves exceeding 135 million tonnes.²⁹ In 2024, the government awarded a 30-year concession to the Novi Boksiti company for red bauxite mining.³⁰ The country is also one of the rare producers of white bauxite, a specialty product with niche industrial applications, further highlighting Montenegro's unique position in the regional mineral landscape.

The aluminum industry, however, faced major disruptions in 2024 when the Uniprom Metals Podgorica Aluminum Plant ceased primary aluminum production due to high energy costs and disputes with the government, ending a 52-year period of domestic smelting. The facilities for the production of aluminum logs and alloys meanwhile remain in operation, but the plant now imports the metal to manufacture them.³¹

Beyond aluminum, Montenegro hosts polymetallic deposits in the north, particularly around Pljevlja and Mojkovac, where lead, zinc, silver, and associated copper occur. In 2010, the Montenegrin government granted 25-year exploration and mining rights to Australian mining company Sultan Corporation for the Brskovo lead and zinc complex near Mojkovac. In 2018, Swiss company Tara Resources AG acquired the project which it is currently operating via its local subsidiary Brskovo Mine. However, the citizens of Mojkovac and the *Ne damo Mojkovac* association, protested the re-opening of the mine and demanded that the Government terminate the concession for the mine,³² as they have not seen "a single positive effect of this project, but only devastation, pollution and contamination of the environment."³³ Following the change of government in Montenegro, amid growing pressure from the local community in Mojkovac, the Government cancelled its concession contract with Tara Resources, citing a problem with a feasibility study that conflicted with the country's current laws.³⁴ At the time of writing, the international arbitration over the Swiss company's claim was still ongoing.

Looking forward, Montenegro's mineral future will likely depend less on the sheer size of deposits and more on responsible governance, technological upgrading, and alignment with European Union standards for sustainability, critical raw materials, and supply-chain resilience – as the country currently finds itself in the last stage of negotiations for EU membership. By harmonizing its mining policies with EU frameworks and fostering strategic partnerships, Montenegro aims to leverage its bauxite resources, polymetallic ores, and industrial minerals to participate deeply in regional and European supply chains.

²⁹ <https://www.uniprom.me/en>

³⁰ Chatterjee, P. October 22, 2024. Montenegro's concession contract with Novi Boksiti holds promise of excavation for 30 years. Al Circle. <https://www.alcircle.com/news/montenegro-s-concession-contract-with-novi-boksiti-holds-promise-of-ex-cavation-for-30-years-112312>.

³¹ Jajcanin, Dj. Montenegro's Uniprom ceases aluminum production at KAP, *SEENews* (2023). <https://seenews.com/news/montenegros-uniprom-ceases-aluminium-production-at-kap-report-1229554>.

³² Milicevic, Lj. Mojkovac residents block roads demanding from govt. termination of Brskovo mine concession. *Vijesti*. (October 9, 2024)

³³ Interview with a civic activist, Podgorica, May 2025.

³⁴ Jajcanin (2023).

North Macedonia

North Macedonia's geological structure, shaped by ancient rock systems and past volcanic processes, endows the country with a wide variety of mineral wealth, ranging from metallic ores to industrial and non-metallic resources. Although North Macedonia's mining industry has traditionally remained subdued, the increase in exploration activity, particularly focused on copper and polymetallic prospects, raises the likelihood of fresh discoveries and heightened investment from mining companies. Employment in the mining industry remains modest compared with other sectors, yet mining contributes strongly with 2.8% to the nation's total exports.³⁵ Over the past decade, the sector has benefited considerably from foreign direct investment, driven by more relaxed regulations for obtaining permits and concessions.

Nonetheless, both historical and recent extraction practices in the country have left extensive waste deposits, particularly from operations focused on the exploration of antimony, arsenic, chromium, copper, and lead.³⁶ This has caused persistent water and soil contamination, negatively impacting both biodiversity and public health in surrounding communities, and leading to widespread civic opposition against new mines.³⁷

Public opposition has grown so strong that multiple environmental organizations have emerged in different parts of the country, including *Zdrava Kotlina* in Strumica, *Eko Dolina* in Novo Selo, and the grassroots movement "Save the Strumica Valley – Stop the Mine of Death" in Strumica.³⁸ After years of struggle which included an 18-day road blockade, a series of protests, local media appearances and even a local referendum, these organizations succeeded in halting the British-Canadian company Euromax Resources' Ilovica-Štuka gold and copper project.

Activists have highlighted that, despite the severity of pollution, contamination incidents are often followed by slow institutional responses, insufficient environmental inspections, inconsistent monitoring of water toxicity, and minimal state media attention and limited public awareness. They also point to systemic weaknesses in the country's rule of law, citing patterns of regulatory capture, political interference, and weak enforcement mechanisms. For instance, the concessionaire of the Toranica mine, Bulgarian company Bulmak 2016, is reported to have

³⁵ Macedonian Mining Association (2021), *Review of the Situation in the Mining and Quarrying Sector*, https://www.mchamber.mk/upload/%D0%98%D0%9D%D0%A4%D0%9E%D0%A0%D0%9C%D0%90%D0%A6%D0%98%D0%88%D0%90_%D0%97%D0%90_%D0%A0%D0%A3%D0%94%D0%90%D0%A0%D0%A1%D0%A2%D0%92%D0%9E%D0%A2%D0%9E.pdf.

³⁶ Đorđević, T. (2025). Balancing between environmental pollution and unutilized resource potential: mine wastes of North Macedonia, University of Vienna.

³⁷ Samardžev, A. (2023). North Macedonia, citizens oppose the opening of mines. Osservatorio Balkani e Caucaso. https://www.balcanicaucaso.org/en/cp_article/north-macedonia-citizens-oppose-the-opening-of-mines/#:~:text=Civil%20society%20organizations%20in%20North%20Macedonia%20have,for%20its%20fertile%20soil%20and%20quality%20agricultural.

³⁸ Interview with a civic activist, Skopje, May 2025.

close connections with senior political figures and a controversial corporate history associated with organized crime networks.³⁹

The country's geological diversity has endowed it with a wide range of mineral resources, including base metals, precious metals, industrial minerals, and energy resources. Key critical raw materials on the EU list that also occur in North Macedonia's geology include copper, antimony, arsenic, nickel, manganese, and feldspar.

One of the most important mining operations in the country is the Bučim Mine, located near Radoviš. This is the largest active mine in North Macedonia and processes millions of tonnes of ore annually, producing copper concentrate that is exported for further refining. The Suvodol Mine, situated in the Bitola region, contains one of Europe's largest lignite reserves. It plays a crucial role in supporting nearby coal-fired power plants, essential to the country's electricity supply. Although global energy trends are shifting toward renewable sources, lignite remains an important transitional energy resource. In addition, North Macedonia possesses substantial resources of lead, zinc, antimony, and silver. The country is also rich in industrial minerals such as bentonite, talc, gypsum, and quartz sand, which are used in construction, ceramics, and other manufacturing sectors.

In light of environmental concerns and the country's European integration ambitions, North Macedonia is undertaking reforms of its mining and geological regulations. These reforms aim to enhance transparency, bolster environmental safeguards, and improve strategic planning, ensuring that mining supports sustainable economic growth while reducing ecological and social impacts.

Serbia

Serbia is emerging as a leading European mining center. Recent discoveries of lithium, copper, gold, silver, and zinc deposits, by international companies, confirmed a mineral wealth estimated at \$200 billion. Major initiatives include Zijin Mining's large-scale copper and gold activities in eastern Serbia and the controversial Rio Tinto Jadar lithium venture.

The total gross value added (GVA) from the energy and mining sectors reached approximately €4.9 billion in 2023, representing 6.5% of Serbia's GDP. By activity, mining of metal ores accounted for nearly €1.2 billion. In 2024, the energy and mining industry comprised around 2,400 active companies and 465 individual entrepreneurs, totaling nearly 2,900 operators.⁴⁰

Serbia is the largest copper exporter in the region and ranks among the top exporters worldwide. However, 80% of copper ore and concentrate exports are exported to China while in contrast, only 10% of Serbia's copper ores are exported to the EU. The copper mining and process-

³⁹ Gjorgjioska, M. (2025). The Toranica Mine Spill: Environmental Degradation, Corruption Networks, and Political Influence. China-SEE Institute, Volume 4, No 1.

⁴⁰ Chamber of Commerce and Industry of Serbia. <https://en.pks.rs/industry-associations/association-5>.

ing sector in Serbia is overwhelmingly dominated by the Chinese Zijin Mining Group through two local subsidiaries operating in the Bor region. Serbia Zijin Copper, 63% owned by China's Zijin Mining Group and 37% by the Serbian government, runs four copper mines: Jama, Cerovo, Borska Reka, and Majdanpek. Serbia Zijin Mining, a fully private company, operates the Čukaru Peki copper and gold mine. Operating since 2021, it features a high-grade upper zone producing over 90,000 tonnes of copper and 2.5 tonnes of gold annually, with substantial long-term reserves expected to make Serbia Europe's second-largest copper producer.⁴¹

The Chinese investment, amounting to almost €400 million in 2018, came after no Western financiers were prepared to take over the loss-making former Yugoslav mining conglomerate. Since that year, Zijin has assumed control of the Bor mining complex and injected €2.3 billion to substantially enlarge operations. Yet, this expansion is not solely industrial – it is transforming the environment and the daily lives of local residents. Forests, rivers, and wildlife have reportedly been devastated, while inhabitants endure some of the most contaminated air in Europe. Entire households are witnessing their land disappear as the mine consumes settlements. A recent study prepared by the Institute of Public Health of Serbia “Dr. Milan Jovanović Batut” found a higher risk of mortality for the men and women of Bor across age groups as a direct consequence of the local population's exposure to industrial pollution.⁴² Simultaneously, the Serbian government has offered no effective measures for relocating affected residents and has for years evaded transparent dialogue with stakeholders regarding the severe environmental challenges, frequently portraying ecological hotspots as an unavoidable byproduct of economic development.⁴³

The situation in Bor, best characterized as a blatant breach of collective human rights, stands as a stark illustration of the failure of Serbian government institutions tasked with safeguarding both citizens and the environment. This is especially alarming given a proposed mine in western Serbia that, if approved, would yield 2.3 million tonnes of lithium.

The Jadar lithium and boron project near Loznica, led by British-Australian mining powerhouse Rio Tinto, is a proposed but highly controversial operation aimed at exploiting one of Europe's largest proven lithium reserves. While hailed by the Serbian authorities as a “project of the century,”⁴⁴ and included in the list of EU projects of strategic importance⁴⁵ with the po-

⁴¹ Zijin commissions Cukaru Peki copper and gold mine in Serbia (2021). Mining Technology. <https://www.mining-technology.com/news/zijin-cukaru-peki-mine-serbia/#:~:text=The%20mining%20and%20processing%20project,in%20the%20new%20underground%20mine>.

⁴² Study: industrially contaminated sites throughout Serbia threaten human health, *Balkan Green Energy News* (2021). <https://balkangreenenergynews.com/study-industrially-contaminated-sites-throughout-serbia-threaten-human-health/>

⁴³ Morill, J. (2025). A Sacrifice Zone in the Push for Copper: Experiences from Bor, Serbia. Earthworks blog. <https://earthworks.org/blog/a-sacrifice-zone-in-the-push-for-copper-experiences-from-bor-serbia/#:~:text=The%20city%20of%20Bor%2C%20Serbia,operations%20significantly%20in%20recent%20years>.

⁴⁴ Sokić, Lj. (2020). Projekat “Jadar” - Investicija veka ili ekološka katastrofa. *Nova*. <https://nova.rs/uncategorized/projekat-jadar-investicija-veka-ili-ekoloska-katastrofa/>.

⁴⁵ Selected strategic projects. European Commission (2025). https://single-market-economy.ec.europa.eu/sectors/raw-materials/areas-specific-interest/critical-raw-materials/strategic-projects-under-crma/selected-projects_en.

tential to supply up to 90% of Europe's current lithium demand, it has sparked fierce opposition over serious environmental, social, and political ramifications. Following more than a year of continuous student and citizen-led protests across Serbia which challenged the authoritarian rule of President Aleksandar Vučić – the main promoter of lithium operations in Jadar – questions arose about the Government's political credibility to implement lithium extraction. In the same vein, Rio Tinto decided to halt active development of the Jadar lithium project. The company transitioned it to a care and maintenance status, effectively pausing work due to permitting delays, regulatory uncertainty, and a strategic shift to focus on quicker opportunities elsewhere.

Serbia has smaller deposits of nickel, lead, zinc, and potentially rare earth elements in exploration projects, while the country's energy sector is still largely dependent on coal mining primarily taking place in the Kolubara and Kostolac mining basins.

KEY ASPECTS OF MINING AND CRITICAL RAW MATERIALS PLANS IN THE WESTERN BALKANS

GEOPOLITICAL ASPECTS

This section explores how intensifying global competition over critical raw materials intersects with political dynamics, governance structures, and public mobilization in the Western Balkans. Mining projects, particularly lithium extraction in Serbia, are situated within a broader geopolitical landscape marked by growing rivalry between the European Union, China, and the United States. Central to this analysis are questions of how global competition over CRMs affects the region, which external actors are shaping the mining sector, whether opposition to lithium mining is externally orchestrated or domestically rooted, and how the CRMA interacts with enlargement policy and rule-of-law conditionality.

Over the past decade, the Western Balkans has become an arena of intensified global competition. China has expanded its economic footprint, primarily through infrastructure investments and industrial acquisitions, while the EU and the United States have become increasingly concerned about strategic dependencies, particularly in supply chains for minerals essential to green technologies, batteries, and digital industries. The COVID-19 pandemic and

⁴⁶ Kmezić, M. (2025). Student protests in Serbia: The eleventh hour for EU fundamentals, BiEPAG. <https://www.biepag.eu/blog/student-protests-in-serbia-the-eleventh-hour-for-eu-fundamentals>.

⁴⁷ Matić, S. Nemački stručnjak za DW: Projekat Jadar je propao, *Deutsche Welle* (2005). <https://www.dw.com/sr/nema%C4%8Dki-stru%C4%8Dnjak-za-dw-projekat-jadar-je-propao/a-73971529>.

⁴⁸ Rio Tinto mothballs flagship Jadar lithium project in Serbia. *Bloomberg*, November 13, 2025. <https://www.bloomberg.com/news/articles/2025-11-13/rio-tinto-mothballs-flagship-jadar-lithium-project-in-serbia>.

Russia's war against Ukraine accelerated the urgency of securing reliable supplies. No other region is as closely integrated into the EU as the Western Balkans, making the six countries obvious targets for EU near-shoring efforts. Thus, two trends converge: growing geopolitical rivalry and mounting demand for CRMs.

Within this context, the EU adopted the Critical Raw Materials Act, identifying 34 critical and 17 strategic raw materials and aiming to reduce dependence on dominant suppliers, particularly China. Between 2021 and 2024, the EU signed fourteen memoranda of understanding on raw materials with partner countries; Serbia is the only Western Balkan country included among these strategic partners. In June 2025, the European Commission designated thirteen projects outside the EU as "strategic," among them the Rio Tinto lithium project in Serbia. This elevated the Jadar project to a central pillar of the EU's CRM policy beyond its borders.

When it comes to the Western multinational companies prominently present in the region, including Rio Tinto in Serbia, Adriatic Metals in Bosnia and Herzegovina, and Euromax Resources in North Macedonia, we have to look beyond the "Western" label and zoom in into their complex ownership structures. For example, 14.56% of Rio Tinto is owned by the Aluminum Corporation of China (Chinalco), illustrating how globalized capital blurs geopolitical categories.

China's role in the Western Balkans is broader and more politically visible. Beyond infrastructure and energy investments, Chinese involvement in mining is most substantial in Serbia. The partially state-owned company Zijin Mining acquired the RTB Bor copper complex in 2018, pledging to invest approximately \$1.26 billion and maintain its workforce of around 5,000 employees. It later opened the Čukaru Peki copper-gold mine, considerably increasing Serbia's copper output. However, the project has been associated with environmental pollution, labor rights controversies, and a 2025 US import ban under the Uyghur Forced Labour Prevention Act. While China is a visible player, its dominance in extractive industries is largely limited to Serbia, and geopolitical competition in mining is primarily between Chinese and Western corporate actors.

Other global actors play comparatively minor roles. Russia has limited engagement in mining, focusing instead on energy investments. Turkish companies have participated in selected projects, including copper production in Albania, but without a strategic expansion comparable to China's presence. Companies from the United Arab Emirates have invested heavily in real estate and tourism rather than mining. Consequently, the geopolitical contest in the mining sector is essentially a competition between China and Western-backed projects, with the EU seeking to secure supply chains and reduce strategic vulnerability.

In the part of the study focusing on geopolitics, the Rio Tinto lithium project in Serbia's Jadar Valley plays a central role. As discussed above, the EU's endorsement of the project risks aligning strategic supply interests with a governance environment characterized by democratic backsliding. A central claim by Rio Tinto and some Western commentators is that opposition to the project has been amplified by foreign disinformation, particularly from Russia. The

company's CEO himself asserted that “never in the history of Rio Tinto, anywhere in the world, have we been exposed to so much misinformation and fake news as on this project.” However, there is little evidence supporting the narrative of a coordinated Russian campaign driving the protests. While Russian media outlets such as *Sputnik* reported critically on the project, they did not appear to orchestrate opposition. Moreover, far-right pro-Russian parties were marginal actors in Serbian electoral politics, receiving limited support. Independent media and civil society groups played a far more significant role in mobilizing resistance.

Ultimately, we argue that the geopolitics of mining in the Western Balkans cannot be reduced to a contest between Russia and the West. Domestic governance deficits, weak institutions, and environmental mistrust are decisive factors. If the EU wishes to secure critical raw materials sustainably, it must explicitly link CRM initiatives to enlargement reforms, strengthen monitoring mechanisms, and ensure meaningful public consultation. Otherwise, the pursuit of strategic autonomy may paradoxically weaken the democratic transformation that remains central to the EU's long-term interests in the region.

REGULATORY FRAMEWORK

The chapter on the regulatory and environmental governance frameworks that shape contemporary mining expansion in Serbia and Bosnia and Herzegovina situates extractive development within institutional contexts marked by incomplete strategic planning, weak preventive environmental mechanisms, discretionary concession regimes, and broader rule-of-law deficits. While mining, and particularly lithium and other critical raw materials mining, is increasingly framed as a strategic economic opportunity driven by the European Green Deal and the EU Critical Raw Materials Act, the domestic regulatory architectures designed to safeguard environmental protection, public participation, and human rights remain structurally fragile, partly politicized and inconsistently enforced.

In Serbia, the central legislative instrument is the Law on Mining and Geological Explorations, adopted in 2015 and amended in 2018 and 2021. The Constitution establishes natural resources as state property, yet the law allows private actors to acquire exploitation rights. Lithium and boron are explicitly classified as mineral raw materials of “strategic importance,” although the law provides no definition of this designation. At the same time, Serbia has not established a methodology for defining its own critical mineral raw materials, even as it positions itself as a future “stable long-term supplier” to the European Union's green transition. This reflects a broader pattern: strategic economic ambition is not matched by strategic governance capacity and administrative and legal ability.

The Draft Strategy for Managing Mineral and Other Geological Resources (2025–2040) illustrates this imbalance. It envisages an “accelerated development” scenario, including annual lithium carbonate production of up to 58,000 tonnes and an increase in mining's share of GDP from the current 2.7% to potentially between 5 and 8%. Yet these projections are advanced in the absence of a valid national Development Plan, a finalized Mineral Resources Strategy, a fully adopted Spatial Plan of the Republic, or harmonized environmental legislation. The result

is a policy landscape in which extractivism becomes a de facto development paradigm before a comprehensive social and environmental framework has been established.

In Bosnia and Herzegovina with its complex state structure and prolonged disputes between entities and constituent peoples, governance fragmentation and dysfunctionality further exacerbate regulatory weaknesses. Neither the Federation of Bosnia and Herzegovina nor Republika Srpska has adopted a comprehensive mineral resource management strategy. Spatial planning frameworks are outdated, and in some cases decades old. This absence of higher-level planning documents enables mining projects to advance through ad hoc spatial plans tailored to individual projects, often privileging immediate investment interests over long-term environmental sustainability and coherent territorial development.

Furthermore, the concession regime constitutes another structural vulnerability. In both entities of Bosnia and Herzegovina, concessions may formally be granted through public tenders or unsolicited proposals. In practice, however, unsolicited proposals have become the dominant model. In the Federation of BiH, all concession contracts to date have reportedly been concluded on this basis. The legal framework grants contracting parties broad discretion in defining key contract terms, including concession fees and duration, without prescribing clear minimum criteria or mandatory adjustment mechanisms over time. In Republika Srpska, harmonization of concession fees in response to legal or economic changes is merely optional; if the concessionaire rejects amendments, the original fee remains in force for the entire duration of the contract. Given that mining concessions often last decades, this structure creates a high risk of locking public revenue at levels that may quickly become outdated, thereby privileging private profitability over public interest.

Similar concerns arise in Serbia regarding expropriation procedures. The Mining Law and related legislation allow expropriation for projects classified as being of “importance to the Republic,” even where private companies are the direct beneficiaries. In practice, this has enabled expedited expropriation processes and, in some cases, handover of property before compensation decisions became final. Although the law restricts early handover to urgent cases, the construction of profit-oriented mining projects stretches the meaning of urgency. Such provisions raise constitutional concerns and illustrate how public interest can be expansively interpreted to facilitate private extractive ventures.

The most serious deficiencies emerge however in the domain of preventive environmental protection, both in Serbia and Bosnia and Herzegovina, but also in Montenegro and North Macedonia. Serbia introduced environmental impact assessment (EIA), strategic environmental assessment, and integrated pollution prevention mechanisms in 2004 as part of its EU integration process. However, nearly two decades later, a functional and coherent preventive system has not been established. The Law on Environmental Impact Assessment remains insufficiently aligned with EU Directive 2011/92/EU, and impact assessments are not required at the earliest stages of exploration. Project fragmentation, often referred to as *salami slicing*, has become common practice. Namely, investors divide an integrated project into smaller components in order to minimize the perceived scope of environmental impact and avoid

comprehensive assessment. The Jadar lithium project exemplifies these weaknesses. The investor submitted a request for determining the scope and content of the EIA study covering only underground exploitation, excluding ore processing, waste disposal, water extraction, and related infrastructure. The Ministry of Environmental Protection accepted the position that the mine could function as an independent unit, despite the evident functional integration of extraction and processing within the same project. In doing so, the authorities effectively endorsed fragmentation and reduced the environmental assessment to a partial abstraction detached from the project's full environmental footprint. In addition, conditions issued by competent bodies such as the Water Directorate were treated as formal attachments rather than substantive requirements to be incorporated into the project design. Both the Ministry and the Government, acting as second-instance authority, adopted the view that attaching such conditions was sufficient, even if the project proposal was not harmonized with their content. This interpretation transforms regulatory safeguards into procedural formalities and undermines the preventive logic that underpins environmental impact assessment.

The scale of environmental risk is underscored by data on mining waste and pollution. Serbia generates approximately 170 million tonnes of mining waste annually, of which 23.1% is classified as hazardous. Mining waste constitutes by far the largest waste stream in the country, dwarfing other industrial waste flows. In 2024, 22% of industrial wastewater originated in the mining sector, yet only 12% of it was treated, which is a decrease from 16% the previous year and far below the 50.7% treated in 2011. Not a single operator holds a permit for the collection, transport, treatment, and disposal of mining waste, and only one operator reportedly manages waste under an approved plan. The State Audit Institution has concluded that no effective system exists for monitoring or verifying data on mining waste quantities, and no comprehensive database is publicly available.

The environmental and health implications are severe, nowhere more so than in the Bor region. Studies indicate considerably elevated mortality risks from malignant tumors (excluding skin cancer) and a decline in life expectancy of more than two years between 2018 and 2022. Despite these alarming trends, authorities have delayed comprehensive epidemiological studies and failed to implement promised toxicological testing programs. Such patterns reflect not only regulatory weakness but also a troubling absence of precautionary governance.

The European dimension adds further complexity. The EU Critical Raw Materials Act introduces the category of "strategic projects," including in third countries. The Jadar project was designated as strategic in 2025. While CRMA formally requires compliance with environmental standards, human rights, and local participation, the criteria for selection are broadly framed and decision-making procedures lack robust transparency. Civil society actors have limited capacity to meaningfully influence the process. The discrepancy between declarative commitments to high environmental standards and the domestic reality of limited administrative capacity and partial EU *acquis* harmonization raises concerns about external legitimization of projects within fragile regulatory systems.

The analysis reveals a structural pattern across Serbia and Bosnia and Herzegovina. Mining ex-

pansion is promoted through strategic economic narratives, yet embedded in regulatory systems characterized by discretionary concessions, weak preventive environmental instruments, limited inspection authority, inadequate sanctioning, fragmented spatial planning, and restricted public participation. The challenge is therefore not merely one of technical legislative adjustment but of institutional transformation. Without comprehensive harmonization with EU environmental standards, binding financial guarantees for remediation, strengthened inspection powers, meaningful public oversight, and transparent strategic planning, extractive expansion risks entrenching environmental degradation and further eroding the rule of law.

Our analysis shows that mining is not only an economic question but a comprehensive governance test: the capacity of states to align resource development with environmental protection, democratic accountability, and long-term sustainability amid accelerating demand for critical raw materials.

FINANCIAL AND ECONOMIC ASPECTS

The part of our study which focuses on economic and financial assessment of the mining sector in the Western Balkans formulates a question which is both empirical and political: what is the real economic weight of mining in the region, and who ultimately captures the value it generates? By combining macroeconomic data, firm-level financial statements, and detailed case studies of major mining projects, the analysis challenges the widespread narrative that extractive expansion represents a transformative development opportunity. Instead, it shows that mining has a limited macroeconomic footprint while generating highly concentrated profits that accrue primarily to private and very often foreign owners.

At the macroeconomic level, the sector remains small across all six economies. Mining and quarrying account for roughly 1–3% of GDP in most Western Balkan countries. In Albania, Bosnia and Herzegovina, Montenegro, and North Macedonia, the share hovers around 1%; in Kosovo it is about 1.5%; and only in Serbia does it reach approximately 3%. Even in Serbia, where Chinese investment revitalized the copper complex in Bor after 2018, mining continues to represent a modest portion of total output. In most countries, the sector's share in value added has declined over the past decade, reflecting structural shifts toward services and manufacturing, as well as depleted reserves and volatile commodity prices.

Employment patterns reinforce this picture of limited structural importance. Mining typically accounts for around 1% of total employment, with Bosnia and Herzegovina as a partial exception due to its large, state-owned coal mines. In absolute numbers, employment in the sector remains low: approximately 2,000 workers in Montenegro, 4,000 in Kosovo, 6,000 in North Macedonia, 9,000 in Albania, 21,000 in Bosnia and Herzegovina, and 38,000 in Serbia. Even in Serbia, employment growth following the expansion of Chinese-owned copper mining has been modest compared to the increase in value added, indicating high capital intensity and limited job creation. The discrepancy between a 3% GDP share and roughly 1.3% employment share in Serbia illustrates the sector's strong productivity per worker but weak capacity for broad-based employment generation.

Wages in mining are generally above national averages, with a premium ranging from 5% in Kosovo to nearly 70% in Albania, and around 20–30% in most other countries. This premium reflects the hazardous and physically demanding nature of the work. However, given the small number of workers employed, even relatively high wages translate into a modest aggregate wage bill at the national level. The sector's investment profile further underscores its limited macroeconomic relevance. In most Western Balkan countries, mining-related gross fixed investment amounts to around 2% of total investment and roughly 0.5% of GDP. Serbia again stands out as an exception, with mining accounting for around 7% of total investment and 1.2% of GDP in 2024, largely driven by Zijin Mining's estimated €2.3 billion cumulative investment since 2018.

The picture is somewhat different when examining foreign direct investment. In 2024, Serbia recorded as much as 28% of total FDI inflows in mining and quarrying, again reflecting Chinese investment in copper and gold operations. Albania also saw a notable mining FDI share of 13.5%, largely tied to chromium production. In other countries, mining-related FDI remains modest, typically below 7%. Even so, the macroeconomic data make clear that mining is not and can hardly become a dominant pillar of Western Balkan economies. Rather, it represents a narrow, capital-intensive enclave sector whose aggregate contribution to GDP, employment, and investment remains limited.

The core analytical contribution of this part of our study lies in its firm-level analysis of medium and large mining companies in Bosnia and Herzegovina, Montenegro, North Macedonia, and Serbia. Drawing on financial statements data for 2022, we provide a snapshot of employment, wage costs, tax payments, ownership structures, and profitability. The findings reveal a striking distributional imbalance. Across the four countries analyzed, mining companies paid approximately \$521 million in wages and \$65 million in taxes, while generating nearly \$982 million in net profits after tax. In other words, profits were almost twice as high as total labor costs and roughly fifteen times higher than taxes paid to the state.

Country-level patterns vary but point in the same direction. In Bosnia and Herzegovina, the sector recorded an aggregate loss due to chronically unprofitable state-owned coal mines supplying electricity at regulated prices. Excluding these coal mines, however, the remaining mining companies generated approximately \$20 million in net profits, compared with \$44 million in wage costs and just \$1.4 million in tax payments. In Montenegro, \$30 million in wages and \$4.4 million in taxes were accompanied by \$17 million in profits. In North Macedonia, the imbalance is more pronounced: \$53 million in wages and \$10 million in taxes contrast with \$86 million in net profits. Serbia presents the most extreme case. In 2022, mining companies paid \$285 million in wages and \$49 million in taxes, but generated an extraordinary \$907 million in net profits. The largest Chinese-owned mines reported EBIT margins of 42% and 74%, indicating exceptionally high operating profitability.

Case studies of four major projects, including Rupice (Bosnia and Herzegovina), Bor (Serbia), Jadar (Serbia), and Lopare (Bosnia and Herzegovina) reinforce these findings. The Rupice silver–gold–zinc mine, operated by Adriatic Metals (now acquired by Dundee Precious Metals),

is expected to generate post-tax earnings of approximately \$1.06 billion over its lifespan, compared with total projected government revenues of around \$200 million and substantially smaller cumulative wage payments. The breakeven period was estimated at less than one year, highlighting the project's extraordinary profitability. Similarly, the Bor and Čukaru Peki copper–gold operations generated around \$953 million in operating profits in 2022, compared with roughly \$115 million in total wages and around \$41.5 million in tax payments.

Projected figures for the planned Jadar lithium mine suggest annual profits after tax of around \$535 million, compared with €31 million in annual wages and \$200 million in government revenues. The Lopare lithium project, although still awaiting permits, is estimated to generate annual profits in the range of \$200–300 million, dwarfing projected wage bills of around €23 million and royalties of approximately \$7 million. Across all cases, profits substantially exceed both wages and public revenues.

The evidence supports our central argument: mining in the Western Balkans resembles a highly capital-intensive enclave sector with limited macroeconomic impact but extremely high private returns. Workers benefit through moderately higher wages and municipalities may experience short-term fiscal inflows or localized development effects. However, the dominant share of value accrues to company owners, frequently foreign corporations. Tax contributions and royalty payments remain modest relative to profitability, and breakeven periods are often short. This pattern partly resembles a neo-colonial model of resource extraction, in which natural resources generate substantial profits for external investors while contributing relatively little to long-term structural development. Importantly, the quantitative analysis does not incorporate environmental degradation, social displacement, or long-term ecological costs, all factors that would likely further diminish the net public benefit of mining projects.

Yet, we do not advocate for a categorical rejection of mining. In certain peripheral regions, it remains one of the few sources of formal employment, and global demand for critical raw materials is rising rapidly. The key issue, therefore, is not whether mining should take place, but how it is organized, prepared, regulated and executed, and how the value it generates is distributed.

CIVIC MOBILIZATION AND RESISTANCE AGAINST MINING PROJECTS

As a particular focus of our study, we applied a set of qualitative methods (focus groups, in-depth interviews) to provide a comprehensive picture and offer an analysis of the emergence, evolution, and political significance of environmental and anti-mining movements across the region. The resistance to extractive projects has become one of the most dynamic and consequential forms of civic engagement in the Western Balkans, reshaping both civil society and the broader political arena. Environmental mobilization around mining has evolved into a broader struggle over democracy, institutional accountability, and development models.

Contemporary anti-mining activism needs to be placed within a broader trajectory of environmental engagement in the region. Until the mid-2010s, environmental NGOs (eNGOs) were relatively marginal actors, often cautious and donor-oriented – embedded in policy reform processes but reluctant to participate in contentious street politics. A clear divide emerged between established NGOs and grassroots initiatives, particularly during controversies such as the Belgrade Waterfront project, when environmental concerns failed to translate into coordinated mobilization. A key moment in the transformation of the civic landscape was when established NGOs, constrained by professionalization and funding logics, were increasingly outpaced by informal, place-based, and ideologically broader movements.

A turning point came with opposition to large-scale investment projects perceived as threatening public space and natural habitats. Right-to-the-city movements in Zagreb and Belgrade catalyzed a new generation of green activists, some of whom later entered formal politics through parties including *Možemo!* in Croatia and the Green-Left Front in Serbia. Simultaneously, environmental activism gained ground in smaller towns and rural areas, particularly around air pollution, waste management, and infrastructure projects. However, the most significant regional mobilization before the lithium controversies was the pan-Balkan struggle against small hydropower plants (SHPs). As governments incentivized hydropower investment under renewable energy commitments, approximately 3,000 SHPs were planned across the Balkans. Local communities, alarmed by ecological damage to rivers and surrounding ecosystems, organized sustained protests. Initiatives such as the “Brave Women of Kruščica” and “Let’s Defend the Rivers of Stara Planina” gained domestic and international attention, and cross-ethnic solidarity in places like Štrpce in Kosovo demonstrated the unifying potential of environmental issues. These struggles eventually crystallized into regional networks, most notably the alliance “Let’s Defend the Rivers of the Balkans.”

Against this backdrop, lithium mining emerged as a new focal point of contention. Anti-lithium mobilization, particularly around the Jadar project in Serbia and the Majeвица/Lopare project in Bosnia and Herzegovina, built upon organizational experience, networks, and tactical repertoires developed during earlier environmental campaigns. We argue that these mobilizations are not isolated local protests but interconnected nodes in a broader civic reconfiguration in the wider region.

The national case studies illustrate how local dynamics interact with institutional and political contexts. In Montenegro, opposition to the Brskovo mining concession in Mojkovac demonstrates a relatively responsive institutional pathway. Citizens raised concerns through public debates rather than mass protests, highlighting inaccuracies and environmental risks in project documentation. An interdepartmental commission eventually rescinded the concession in 2023 due to irregularities, although the company initiated arbitration proceedings. This case suggests that, where institutional channels function with some degree of independence, civic engagement can influence outcomes.

North Macedonia presents a more ambiguous trajectory. The Strumica valley, targeted for gold and copper extraction by Euromax Resources, has witnessed prolonged legal and po-

litical contestation. Despite repeated breaches of concession deadlines, government decisions oscillated between approval and revocation, frequently contradicting public promises made during election campaigns. Civil society organizations such as *Zdrava Kotlina* mobilized around environmental and public health risks, particularly cyanide-based gold processing. Although mass protests prompted reversals of government decisions, legal uncertainty and potential corporate litigation persist. Here, mobilization reveals both the potential and limits of civic pressure in contexts marked by regulatory inconsistency and political compromise.

In Bosnia and Herzegovina and Serbia, anti-mining activism unfolds within even more polarized and geopolitically entangled settings. In Lopare (Republika Srpska), local citizens discovered lithium exploration plans indirectly, fostering distrust and prompting the formation of grassroots groups such as *Čuvari Majevice*. Municipal leaders publicly opposed mining under civic pressure, yet Bosnia and Herzegovina's multilayered governance structure limits local autonomy. In Serbia, resistance intensified around the Rio Tinto Jadar project. After massive protests in 2021 led to the cancellation of spatial plans, the Serbian government reinstated the project in 2024, signing a strategic lithium partnership with the EU. Anti-mining activism in Serbia is marked by exceptional repression: activists report surveillance, detentions, smear campaigns, and labelling as "eco-terrorists." The December 2021 road blockades, involving thousands of citizens nationwide, became emblematic of broader democratic discontent.

A central contribution of the chapter lies in the focus group research conducted with activists in Tuzla and Loznica in 2025. These discussions reveal distinctive sociological and organizational features of anti-mining initiatives. Many organizations emerged spontaneously, often led by older residents who felt a deep sense of responsibility toward their communities. War veterans, youth activists, scientists, and local farmers formed heterogeneous coalitions united by environmental and anti-corruption concerns. A shared narrative emphasizes lack of information, opaque decision-making, and exclusion from consultations as primary triggers for mobilization. Activists perceive themselves as substitutes for captured institutions and compromised media, assuming roles in public information, monitoring, and advocacy.

Cross-ethnic and cross-regional cooperation stands out as a defining characteristic, particularly in Bosnia and Herzegovina, where environmental mobilization cuts across entrenched ethno-political divides. Activists explicitly frame their struggle as one beyond ethnic identity: protecting land and water for all. Regional and transnational alliances further reinforce this orientation. Initiatives such as ZBOR (United Balkan Resistance and Work) and the "Jadar Declaration" connect Western Balkan activists with counterparts in Germany, Portugal, Chile, and Spain, situating local resistance within global debates about extractivism and the "green transition."

Our study underscores corruption as a unifying theme across all regional and local cases. Activists consistently identify state-investor collusion and institutional capture – not foreign companies per se – as the core problem. Mining conflicts have thus become proxies for broader grievances regarding elite impunity, authoritarian governance, and lack of accountability. Environmental mobilization has merged with anti-corruption activism, positioning these civic

initiatives as defenders of democratic norms. In Serbia especially, anti-mining activism has become intertwined with student and citizen protest movements challenging the political regime.

At the same time, activists face notable obstacles: intimidation, SLAPP lawsuits, media harassment, and economic retaliation against families. Institutional mistrust is pervasive, and disappointment with the European Union is notable, particularly where EU-backed projects appear to contradict local environmental concerns. Nevertheless, activists articulate a wide ideological spectrum and reject simplistic labelling as anti-Western. Their critique targets perceived double standards and democratic deficits rather than geopolitical alignment.

Based on the analysis, we argue that environmental mobilization has fundamentally recast civil society in the Western Balkans. Grassroots initiatives increasingly set the agenda, often surpassing established NGOs in legitimacy and responsiveness. Their strength derives from local embeddedness, cross-community alliances, and the ability to link environmental protection with democratic accountability. Mining projects – and here especially lithium, but also other major projects – are likely to remain flashpoints, given global demand for critical raw materials and weak regulatory frameworks in the region.

SETTING THE STAGE: EXPLORING INTERSECTIONS IN THE FIELD OF MINING THROUGH A COMPREHENSIVE STUDY

The analysis presented throughout this study highlights the complex and interdependent nature of mining and critical raw materials extraction in the Western Balkans. Across the examined states – Bosnia and Herzegovina, Serbia, Montenegro, and North Macedonia – several recurring themes have emerged, revealing both opportunities and challenges in aligning resource extraction with sustainable development, legal compliance, and public participation.

These findings illustrate that mining in the Western Balkans cannot be understood through a single lens. Economic imperatives, social mobilization, regulatory frameworks, and geopolitical considerations are tightly interconnected. Even if undertaken, successful critical raw materials extraction depends on several conditions: fostering responsible investment, enhancing legal and institutional capacity, implementing projects only where the highest environmental standards are in place, respecting community voices, and integrating projects into broader European and global supply chain strategies.

In conclusion, mining in the Western Balkans must not be considered separately from the ongoing process of EU enlargement in which all countries studied are involved. The region's resource wealth can contribute to the EU's economic growth and energy transition goals if

extraction is pursued responsibly, transparently, and inclusively. Civic engagement, financial prudence, robust regulation, and geopolitical awareness must all converge to ensure that potential mining projects deliver sustainable, long-term benefits rather than conflict or environmental degradation. The present study's research and policy recommendations explore these intersections, charting pathways for mining development that are economically viable, socially acceptable, and environmentally responsible.



CHAPTER 2

GEOPOLITICAL ASPECTS OF MINING PROJECTS IN THE WESTERN BALKANS



Florian Bieber

INTRODUCTION

The past decades have been marked by an increasingly antagonistic multipolar world, in which competition and rivalry among key global actors have intensified. This has manifested itself in the Western Balkans through the increased presence of non-Western global actors and competing engagement, which has at times undermined the Euro-Atlantic integration of the region. European and US concerns about dependence on China rose in the 2010s and have accelerated amid the COVID-19 pandemic. From near-shoring to greater supply chain control, the EU and the US have sought to enhance their ability to anticipate and mitigate conflicts with China. This has manifested particularly in the mining and Critical Raw Materials (CRM) sectors. No other region is as closely integrated into the EU as the Western Balkans, making the six countries obvious targets for EU near-shoring efforts.

Thus, two separate trends have intersected in the Western Balkans in recent years. On the one hand, there has been increasing competition for EU dominance in the region when it comes to economic assistance, investment, and political engagement in the past decade. This includes, in particular, China, and, to a lesser extent, Turkey, Russia, and the United Arab Emirates. These engagements are multifaceted and extend beyond the economic sphere to political influence, societal leverage, and other aspects. In many cases, these engagements have been facilitated by authorities in the Western Balkans. The motivations are as diverse as the types of engagement. Some are based on economic considerations; others have sought to reduce reliance on Western, particularly EU, support; others have sought external investments, loans, and support to realize projects that are politically expedient or that promote state capture and illicit activities.

The second trend is the rise of a global competition over critical raw materials, which are essential for the economic success of contemporary economies. These include both rare minerals essential for computing and batteries, and metals that are less rare, but still crucial for maintaining an economy centered on contemporary technology. This competition has taken shape in the attempt by the EU and the United States to reduce the heavy dependence on critical raw materials produced in China or controlled by Chinese companies. The surge of AI and the consequences of global supply chain disruptions due to COVID-19 and the war in Ukraine have accelerated the perceived urgency underpinning the competition. This global competition, which in essence centers on a decoupling of the West from China, does not focus on the Western Balkans, but as an area with considerable supplies of critical raw materials adjacent to the EU, it has come into focus in this larger dynamic.

This chapter examines global geopolitical competition over mining in the Western Balkans, with a particular focus on critical raw materials. The analysis will cover all six Western Balkan countries, focusing on countries with planned mining projects, particularly for critical minerals, and the role of key external actors. It will subsequently examine the most critical project in the region, the Rio Tinto lithium mine project in Serbia, from the perspective of geopolitical

competition. It will conclude with policy recommendations related to the EU Critical Raw Materials Act.

COMPETING GLOBAL ACTORS IN THE WESTERN BALKANS

WESTERN COMPANIES

While many multinational companies, such as Rio Tinto, are understood as “Western,” they are shareholder companies with a global ownership structure. For example, the largest shareholder of Rio Tinto is the Aluminum Corporation of China Limited (Chinalco), which holds a 14.56% stake. The Australian government set a maximum cap of 14.99% for Chinalco ownership. Other main shareholders control less than 4% each of the company and are mostly British, American, and Australian investment funds.

A major mining project in North Macedonia focuses on gold and copper mining in the Strumica region. The concession for the mining is held by Euromax Resources, a Canadian company, which has no other projects besides the planned mine in North Macedonia. The project has met considerable local resistance over environmental issues.¹

Besides Rio Tinto, the other main Western mining company is Adriatic Metals, a UK-owned company operating in Bosnia and Herzegovina with planned expansion in Serbia. It opened a new silver mine in Vareš, which also produces lead and zinc. Neither is on the EU list of critical raw materials, but zinc and silver have been included on the US list of critical minerals. The planned mining in Raška, in southwestern Serbia, also focused on zinc, lead and silver. The Bosnian project also elicited local activism over water pollution concerns.

The Swiss Arcore has been exploring lithium deposits in Bosnia, finding a large lithium carbonate deposit in Lopare, in Republika Srpska, close to Tuzla.² While this project is still at the exploratory stage and has already met resistance, shaped by the opposition to lithium mining in Serbia, it shows the proliferation of mining exploration in the Western Balkans for critical raw materials.

¹ Sanja Mladenović Stević, Aleksandar Samardžiev, “Western Balkans: Europe’s future mining colony?,” Osservatorio Balcani e Caucaso Transeuropa, June 28, 2024, <https://www.balcanicaucaso.org/eng/Areas/Balkans/Western-Balkans-Europe-s-future-mining-colony-232179?>

² “Swiss-based ARCORE finds rich lithium deposit in Bosnia,” mining.com, November 17, 2023, <https://www.mining.com/web/swiss-based-arcore-finds-rich-lithium-deposit-in-bosnia/>

CHINA

Mining investments in the Western Balkans are just part of the broader Chinese engagement in the region, which has primarily focused on infrastructure, including highway construction in Montenegro, North Macedonia, and Serbia, as well as train lines, such as the reconstruction of the Belgrade-Budapest train line. Other loans and investments have focused on energy production, including hydroelectric, coal, and thermal power plants in Bosnia and Herzegovina and Albania. The leading country in terms of volume and number of projects has been Serbia, which, under the government of Aleksandar Vučić, actively courted Chinese loans and investments. In 2016, the Smederevo steel mill was bought by Hesteel Group, a Chinese state-owned company. US Steel ran the steel mill between 2003 and 2012, when it sold the company back to the Serbian state for \$1.³

With regard to critical minerals, the purchase of a majority stake in the RTB copper factory by Zijin Mining Group in 2018 was the first major Chinese investment in the Western Balkans. Zijin Mining is a partially state-owned mining company, focusing on gold, copper, and zinc, with mines in China, and around the world, including in Colombia, DRC, and Australia. The Serbian copper mine is its only mine in Europe. RTB Bor had been struggling, and the Chinese company promised to invest around \$1.26 billion in the company and retain the workforce of 5,000. Serbia Zijin Copper, the new name for RTB Bor, is vertically integrated with four mines, a copper smelter, and other supporting industries in the region of Southeastern Serbia. The nearby new Čukaru Peki (Timok) copper-gold mine was opened in 2021 by Zijin, significantly increasing the copper production in Serbia. Serbia Zijin Copper has been controversial in the region due to substantial pollution and poor working conditions for Chinese workers. The company was banned for importing to the USA in 2025 due to the Uyghur Forced Labor Prevention Act for alleged human rights abuses in China.⁴

Serbia has not been the only country of the Western Balkans exporting raw materials to China or being linked to Chinese enterprises in the mining sector. In Albania, a Chinese-Turkish company has been involved in copper mining (see below) and Montenegro has exported much of the aluminum to China whereas in North Macedonia the Makstil steel plant has been purchased by the Chinese Hesteel group.

³ Valbona Zeneli, Chinese Influence in the Western Balkans and Its Impact on the Region's European Union Integration Process, IWM, June 23, 2023, <https://www.iwm.at/europes-futures/publication/chinese-influence-in-the-western-balkans-and-its-impact-on-the-regions>, Jovanović, Branimir and Sonja Stojadinović, The EU's and China's grants and loans in the Western Balkans, WIIW Policy Note/Policy Report No. 92, April 2025 <https://wiiw.ac.at/the-eu-s-and-china-s-grants-and-loans-in-the-western-balkans-dlp-7279.pdf>

⁴ Katarina Baletić, "US Bans Imports From Chinese Investor in Serbia, Citing Rights Abuses," Balkan Insight, January 15, 2025, <https://balkaninsight.com/2025/01/15/us-bans-imports-from-chinese-investor-in-serbia-citing-rights-abuses/>

Overall, extractive exports make up most exports from all the countries to China, but their importance is overall limited, and only in Serbia is there substantial ownership of extractive industries by Chinese companies.⁵

OTHER GLOBAL ACTORS

Russia has not been a significant player in the mining sector of the Balkans. The only substantial investment had been the Aluminum Plant in Podgorica (KAP), which was bought by companies linked to the Russian oligarch Oleg Deripaska. However, relations between the Montenegrin government and Deripaska soured, and the company went bankrupt and was bought by a businessman close to the Đukanović regime in 2014. Russia has invested in the energy sector, particularly in Serbia, where Gazprom holds a large stake in the main oil and gas company, NIS.⁶ However, this company is not involved in mining.

Turkish companies have been active in mining in the Western Balkans, although on a limited scale. The most important project is a Turkish-Chinese joint venture in Albania. Beralb Sh.A is the Albanian company established in 2001 to engage in copper mining in Albania. It was initially owned solely by Ekin Maden, a Turkish mining company. In 2014, Jiangxi Copper Company Limited, the largest copper producer in China, acquired a 50% stake in the company. In 2017, the Albanian parliament extended the copper production concession to 2043. Albania's share of global and European copper production is relatively minor. Most exports of raw copper have gone to China, whereas processed copper has been exported to the EU.⁷ Beyond copper, the Turkish Kürüm holding operates the steel plant in Elbasan, supplying mostly the domestic market.

As a result, one can describe the geopolitical competition in the Western Balkans regarding mining and critical raw materials as a contest between China and Western companies, with other global players having only a marginal presence. Due to sanctions, it is unlikely that Russia will take on a more active role. Furthermore, Turkey has invested in a variety of sectors across the Western Balkans, from manufacturing to infrastructure. Still, there are few indications that Turkish companies are stepping up mining in the Western Balkans. Companies from the United Arab Emirates have also been major investors in the region. Still, these have primarily focused on real estate (such as Belgrade Waterfront), tourism (particularly in Bosnia), and agriculture, but not in mining.

Under both President Biden and Trump, the US has expressed interest in developing alternatives to Chinese supplies of critical minerals. This has sparked discussion about securing partnerships with countries to mine critical minerals.

⁵ Ana Krstinovska and Vuk Vuksanović, "Win Some, Lose Some": China's Involvement in the Extractive and Raw Materials Industries in the Western Balkans, Prague, Czech Republic: Association for International Affairs (AMO), 2023.

⁶ This is subject to change due to US sanctions against NIS.

⁷ Ana Krstinovska, André Wolf, "Raw Materials for a Resilient Europe: The EU's Strategic Partnership with the Western Balkans," ELIAMEP, think nea – New Narratives of EU Integration, Thematic Report No. 3. October 2025.

The Trump administration has allocated substantial US funds to secure critical minerals for US production, funded by the CHIPS Act. However, most attention of the US has focused on Africa and other non-European sources.⁸ President Trump's interest in Greenland has partially been motivated by critical raw materials and the US administration has expressed interest in companies involved in critical mineral mining in Greenland, including lithium.⁹ The United States has not explicitly expressed an interest in critical raw materials in the Western Balkans. The Biden administration has supported the Rio Tinto lithium mine in Serbia.¹⁰ While the Trump administration has not yet weighed in, there are strong economic ties between Trump's family and Serbia, including a planned "Trump Tower" in downtown Belgrade to be built by the business of his son-in-law, Jared Kushner. Serbian officials have also been openly courting Trump.¹¹ At the House Hearing on the Western Balkans in December 2025, expert witness Max Primorac from the Heritage Foundation argued for a "business" approach to the Western Balkans that focuses on securing critical raw materials for the US and thus linking the Western Balkans to US strategic interests.¹² While this does not (yet) represent US foreign policy, the proximity of the Heritage Foundation to the Trump Administration and the logic of US foreign policy led by economic interests suggest that the US under the Trump Administration might increase its interest in CRMs in the Western Balkans.

EU CRITICAL RAW MATERIALS

The EU approach toward critical raw materials evolved gradually. As early as 2008, the European Commission noted that "Securing reliable and undistorted access to raw materials is increasingly becoming an important factor for the EU's competitiveness."¹³ The document introduced the concept of "raw materials diplomacy." The initial approach was based on cooperation rather than competition with China and prioritized Africa. The first list of critical raw materials was published in 2011 and subsequently revised multiple times.

The EU Critical Raw Materials Act (CRMA) of 2024 defines 34 raw materials as critical and 17 as strategic, based on their importance and potential supply challenges. While the primary focus of the CRMA is to diversify the supply and prevent dependencies, it also includes provisions

⁸ Aleksandra Gadzala Tirziu, "Keeping China at bay and critical minerals stocked: The case for US-Africa defense collaboration," Atlantic Council, June 6, 2025, <https://www.atlanticcouncil.org/in-depth-research-reports/report/keeping-china-at-bay-and-critical-minerals-stocked-the-case-for-us-africa-defense-collaboration/>; John Jacobs, "Resilient Resource Reserve, A plan to catalyze the American Critical Mineral Processing Industry," Bipartisan Policy Center, July 2024, https://bipartisan-policy.org/download/?file=/wp-content/uploads/2024/07/BPC_Resilient-Resource-Reserve.pdf

⁹ "Schielt Trump auf Kärntens seltene Erde?" Der Standard, October 8, 2025

¹⁰ "U.S. Envoy Touts Benefits Of Mining Lithium In Serbia," RFE/RL's Balkan Service, October 11, 2024, <https://www.rferl.org/a/serbia-lithium-fernandez-mining-environment/33155556.html?>; "Officials of United States and the EU voice further support for lithium mining in Serbia," Europe Western Balkans, August 14, 2024, <https://europeanwesternbalkans.com/2024/08/14/officials-of-united-states-and-the-eu-voice-further-support-for-lithium-mining-in-serbia/>

¹¹ Vuk Velebit, "US-Serbian Relations on the Move?" CEPA, August 18, 2025, <https://cepa.org/article/us-serbian-relations-on-the-move/>

¹² House Hearing on Stability in the Western Balkans, December 8, 2025, <https://www.youtube.com/watch?v=VsEumngLwTo>

¹³ European Commission, "The raw materials initiative — meeting our critical needs for growth and jobs in Europe," COM(2008) 699 final, November 4, 2008, <https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2008:0699:FIN:en:PDF>

linked to sustainability, strengthening the European value chain (i.e., supply and processing within Europe), and measures to avoid disruptions of supply.

Between 2018 and 2021, EU policy focused on how CRMs could enable the EU Green Deal. The 2020 Commission Communication on “Critical Raw Materials Resilience: Charting a Path towards greater Security and Sustainability” explicitly mentions the Western Balkans as an important source for CRMs and as a region covered by the strategic partnerships the EU sought to establish with resource-rich countries. While the integration of the Western Balkans into EU supply chains is mentioned, there is no explicit mention of the region as distinct due to its EU membership prospects. The communication specifically mentions borates in Serbia and platinum in Albania.¹⁴

The double shock of COVID-19 and Russian aggression against Ukraine shifted EU attention. This period saw a consolidation of the EU CRM policy, now focusing less on the Green Deal or multilateral cooperation and more on securing EU supply chain independence from Russia and China. Subsequently, the EU signed several MoUs on critical raw materials, including those with Zambia, Namibia, and Argentina. Between 2021 and 2024, 14 such agreements were signed; Ukraine and Serbia were the only European partners.¹⁵ In addition, there is the international Mineral Security Partnership (MSP), which brings together countries including the US, India, the EU, Australia, and many of the EU partners. MSP countries are committed to high environmental, social, and corporate governance standards and include Serbia as the only country from the Western Balkans.¹⁶

The Impact Assessment Report of the European Commission regarding the Critical Raw Materials Act focuses primarily on the impact for the EU and its member states. The stakeholder consultations are extremely limited (310 answers on call for evidence, 263 responses in public consultations, including input mostly from businesses) and focus mainly on the impact within the EU. Furthermore, the interaction with environmental and other legislation was examined only in relation to EU regulations affecting member states.¹⁷ There is, however, no linkage made to either the enlargement process or the question of governance linked to the extraction of critical raw materials.

¹⁴ European Commission, “Critical Raw Materials Resilience: Charting a Path towards greater Security and Sustainability,” COM(2020) 474 final, September 3, 2020, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex:52020DC0474#footnoteref29>

¹⁵ Edward Beales, Camilla Frank, “Securing critical raw materials for European defence,” IISS, August 29, 2025, <https://www.iiss.org/online-analysis/military-balance/2025/08/securing-critical-raw-materials-for-european-defence/>

¹⁶ Dan Ziebarth, “The European Union and Critical Raw Materials: Juggling Geopolitical and Economic Realities,” OIIP, Trend Report 9, January 2025, <https://www.oiiip.ac.at/cms/media/dan.pdf>

¹⁷ European Commission, “Proposal for a Regulation of the European Parliament and of the Council establishing a framework for ensuring a secure and sustainable supply of critical raw materials and amending Regulations (EU) 168/2013, (EU) 2018/858, 2018/1724 and (EU) 2019/1020,” SWD(2023) 161 final, March 16, 2020, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52023SC0161>

Country	CRM(s) from EU 2023 List	Known/Reported Deposits or Potential	Relevance to EU Supply
Serbia	Lithium (SRM), Boron, Copper	Jadar deposit (lithium & borates, unique jadarite mineral); Bor mining basin (major copper production).	Highly strategic for EU battery supply chains; significant copper supplier.
Albania	Nickel (SRM), Bauxite/Aluminum	Nickel laterite deposits (Dibër, Pogradec); Bauxite in Tropojë; Chromium mines (Bulqizë).	Could diversify EU nickel sources; bauxite an alternative to Guinea; chromium remains strategic for stainless steel.
Bosnia and Herzegovina	Bauxite/Aluminum, Magnesite	Bauxite deposits in Mostar & Jajce; Magnesite in Srebrenica & Vareš.	Potential to reduce EU reliance on imports for bauxite and magnesite.
North Macedonia	Copper, Nickel, Chromium, Rare Earth Elements (REEs)	Borov Dol (copper); Ržanovo (nickel, chromium); exploration of REEs in Mariovo alkaline complexes.	Could provide regional nickel and copper; REEs remain early-stage but strategically valuable.
Montenegro	Bauxite/Aluminum, Copper	Bauxite deposits in Nikšić; smaller copper deposits at Šuplja Stijena and Brskovo.	Potential for revival of aluminum production; supplementary copper supply.
Kosovo	Nickel, Chromium, Bauxite	Deposits in Drenica and Gjakova regions.	Resource base aligns with EU CRM needs.

EU Potential CRM in the Western Balkans¹⁸

A 2023 study on critical raw materials finds that the Western Balkans are not a significant producer of these materials. However, this does not mean the region lacks the potential to address the EU's needs for critical raw materials.¹⁹ There are relevant known CRM deposits in all six Western Balkan countries (see table), including lithium, copper, and bauxite.

In June 2025, the European Commission designated 13 projects outside the EU as strategic for CRMA, including the Rio Tinto project in Serbia.²⁰ Besides a graphite mining project in Ukraine, it is the only strategic project in an EU accession country, linking strategic raw materials with the EU accession process.²¹ Through the designation as a strategic project, the Rio Tinto became the most important pillar of EU CRM policy in the Western Balkans.

¹⁸ GSEU, European Critical Raw Materials, https://www.geologicalservice.eu/upload/content/1753/egs_gseu_all_crm_maps.pdf

¹⁹ Milan Grohol, Constanze Veeh, "Study on the critical raw materials for the EU," European Commission, 2023, <https://op.europa.eu/en/publication-detail/-/publication/57318397-fdd4-11ed-a05c-01aa75ed71a1>

²⁰ European Commission, "Commission Decision of June 4, 2025 recognizing certain critical raw material projects located in third countries and in overseas countries or territories as Strategic Projects under Regulation (EU) 2024/1252 of the European Parliament and of the Council," C(2025) 3491 final, June 4, 2025, https://single-market-economy.ec.europa.eu/document/download/808502c2-21c7-4ca8-855f-ff0b528f91c4_en?filename=C_2025_3491_1_EN_ACT_part1_v4.pdf

²¹ Emese Fabian, "Ukrainian graphite and Serbian lithium mining among the EU's new strategic projects," CEE Energy News, June 5, 2025, <https://ceenergynews.com/renewables/ukrainian-graphite-serbian-lithium-mining-eu-strategic-projects/>

The EU Growth Plan for the Western Balkans also includes as one of its seven priorities the integration of the Western Balkans “into the industrial supply chain” of the EU, which includes critical raw materials.²² While the Growth Plan envisages the integration of the Western Balkans into the EU common market, it is not integrated into the EU enlargement process. Furthermore, the EU engagement in the field of CRMs in the Western Balkans, both joint projects and funding reference “high environmental and social governance standards”, but these are neither linked to the accession process nor supported by a clear monitoring system that could ensure compliance.²³ In December 2025, the European Commission launched RESourceEU, an action plan based on CRMA. It mentioned specifically the goal to set up “dedicated investment frameworks” for Western Balkans, Ukraine and the Southern Neighbourhood.²⁴ While this acknowledges the fact that Ukraine and the Western Balkans have a specific relationship to the EU in comparison to other strategic partners, it does not outline how it interlocks with EU enlargement.

Altogether, the rise of the EU interest in securing access to critical raw materials has resulted in the EU considering the Western Balkans not just as future member states, but also as potential partners in securing CRMs. These policies remain disconnected, which results in tensions between different strategic goals of the EU.

To date, the only concrete CRM project in the Western Balkans has been the Rio Tinto project for lithium mining in the Jadar valley in Serbia.²⁵ In this study, it is not the goal to explore the details of the project, but rather to examine whether one can observe geopolitical competition over the project itself, in particular through alleged disinformation campaigns.

THE EU GEOPOLITICAL APPROACH TOWARDS LITHIUM MINING IN SERBIA

Rio Tinto has been exploring lithium deposits in Serbia since 2004. However, the project to build a massive lithium mine in the Jadar valley only gathered momentum in recent years. The project has triggered massive protests and opposition in Serbia. The lack of transparency of the mining project and limited public consultation have amplified this. Massive protests against the project emerged in 2021, particularly over a change to the expropriation law that many affected communities feared would expedite the process.²⁶ The government shelved it

²² Growth Plan for the Western Balkans, https://enlargement.ec.europa.eu/enlargement-policy/growth-plan-western-balkans_en

²³ WB6 CIF, Online Workshop: Critical Raw Materials potential in the Western Balkans Region, April 25, 2024 <https://www.wb6cif.eu/2024/04/26/8488/>

²⁴ European Commission, Commission adopts RESourceEU to secure raw materials, reduce dependencies and boost competitiveness, Press Release, December 5, 2025, https://ec.europa.eu/commission/presscorner/detail/en/ip_25_2891

²⁵ Although according to reports in November 2025, the project has been put on ice by Rio Tinto. Jelisaveta Perišić “Rio Tinto halts lithium mining project Jadar in Serbia,” Balkan Green Energy News, November 13, 2025, <https://balkangreenenergynews.com/rio-tinto-halts-lithium-mining-project-jadar-in-serbia/>

²⁶ “Thousands Rally In Serbia Against Expropriation Law, Lithium Mine,” RFE/RL’s Balkan Service, November 25, 2021, <https://www.rferl.org/a/serbia-mining-lithium-expropriation-/31577972.html>

following the 2021-2022 wave of protests and ahead of snap elections in 2022. Prime Minister Ana Brnabić declared in January 2022 that “With this decision, as far as the Jadar project and Rio Tinto are concerned, everything is over. It’s over.” However, it was not over. Vučić called himself the “stupidest president in the world²⁷” for stopping the deal, suggesting that the decision was hardly final. In early 2024, following parliamentary elections, Vučić declared that there would be no snap elections – a recurring feature of the current regime – in the near future. The government signaled that it would restart the project. By April, Vučić told the Financial Times that the project was back on track.²⁸ This was confirmed in June 2024.²⁹ The German government was invited to the signing of the MoU on raw materials between the EU and Serbia on July 2, 2024, ahead of a Constitutional Court decision that would open the way to resume the project.³⁰

When the Constitutional Court decided on July 11, 2024 that the original annulment was unconstitutional, the government immediately restarted the project. The content and timing of the Court decision are a telling illustration of the “independence” of Serbian institutions. In July 2024, Maroš Šefčovič, Executive Vice-President for the European Green Deal, signed an MoU with the Serbian Minister of Mining and Energy, Dubravka Đedović Handanović, on a strategic partnership on sustainable raw materials, battery value chains, and electric vehicles. As far back as 2021, Germany and the EU signaled support for the mining project. The signing of the MoU and the visit of Scholz and Šefčovič are the most direct and public displays of support for the mining project, followed by a high-profile visit of President Vučić and German Chancellor Scholz to the German mining town of Freiberg in December 2024.³¹

The non-binding MoU signaled the importance of the project for the EU and outlined issues including value-chain development (i.e., creating not just extractive but also processing industries in Serbia), environmental and governance standards, financial support, and human resources. The claim by former Chancellor Scholz that the project was “good because it will be developed in an environmentally compatible way and because it creates economic activity and prosperity” is dubious.³² While the MoU commits Serbia to adhering to best practices on environmental, social, and governance standards, there are serious doubts about these.

²⁷ “Vučić o litijumu: Ispao sam najgluplji predsednik na svetu,” N1, November 22, 2022, <https://n1info.rs/vesti/vucic-o-litijumu-ispao-sam-najgluplji-predsednik-na-svetu/>

²⁸ “Serbia set to give green light to Rio Tinto lithium mine,” Financial Times, April 15, 2024, <https://www.ft.com/content/2bd-0d74e-ff22-442e-8be1-1250fe4bf826>

²⁹ “Vučić: Serbia to reapprove Rio Tinto’s stalled lithium project with EU guarantees,” Balkan Green Energy News, June 17, 2024, <https://balkangreenenergynews.com/vucic-serbia-to-reapprove-rio-tintos-stalled-lithium-project-with-eu-guarantees/>

³⁰ Deutscher Bundestag. Antwort der Bundesregierung auf die Kleine Anfrage der Abgeordneten Cornelia Möhring, Dr. Gregor Gysi, Susanne Hennig-Wellsow und der Gruppe Die Linke–20/13716 – Lithium-Abbau in Serbien, November 25, 2024.

³¹ “Mit serbischem Präsidenten in Freiberg: Scholz betont Bedeutung von Lithium-Abbau,” MDR, December 10, 2024, <https://www.mdr.de/nachrichten/sachsen/chemnitz/freiberg/kanzler-scholz-gewinnung-lithium-projekt-100.html>

³² Dusan Stojanovic, “Germany’s chancellor praises lithium deal with Serbia that could reduce Europe’s dependency on China,” Reuters, July 19, 2024, <https://apnews.com/article/germany-serbia-lithium-scholz-vucic-114befbdab762c829b98616e-94b99a0d>

First, Serbia lacks independent institutions that can monitor the implementation of such standards. Since taking office, the Serbian Progressive Party (SNS) has systematically taken over all state institutions, and none of them can act independently of the ruling party and the president. Thus, there are no domestic institutional safeguards. There is no reason to believe that this would change, considering the centrality of state capture to the ruling party's system of rule.

Secondly, there is no space for public debate and critical voices in Serbia. While there are a few independent media outlets, they lack national reach and are often demonized by government-controlled or private businesses close to the ruling party. Any criticism of the ruling party, President Vučić, or their key policies, is met with ad hominem attacks, smear campaigns, and hate speech. Thousands of bots on social media controlled by the ruling party amplify these messages. Thus, a critical scrutiny of the project implementation in the public sphere is impossible.

Thirdly, the EU is unlikely to be an independent monitor of the standards. Clearly, the project is motivated by its interest in developing lithium capacities independently of China, and, as a result, there is serious questioning of whether the EU will insist on environmental and social standards in Serbia. If it does, there are doubts about its capacities.

Fourthly, the environmental and social track record of other projects in Serbia is dismal. Several mining investments by Chinese companies have resulted in high pollution levels and slave-like conditions for imported labor, both of which are in violation of Serbian law. At the same time, Serbian authorities protected the projects and their investors. Given the scale of the investment, there is little reason for it to differ in this case.

Finally, the deal is often seen through a misleading geopolitical lens. By linking Serbia to the EU, Serbia is being wooed away from other investors and global actors, such as China. However, Vučić has perfected his geopolitical game. While the domestic rhetoric of his media and acolytes is nationalist and anti-Western, he seeks to maximize the 'art of the deal' with as many global actors as possible, to ensure room to maneuver. Thus, the regime has been seeking to make sure it has as few external conditions and restraints as possible.

Thus, there is little reason to believe that German and EU endorsement of the Rio Tinto mine will help protect environmental or social standards and avoid graft and further empowerment of the ruling party.

Since November 2024, the protests against the mining project have been subsumed into the broader civic mobilization against the regime triggered by the collapse of the Novi Sad railway station canopy. These protests have been criticized by the regime as a 'color revolution', which echoes Russian propaganda against democratic protests.

MEDIA DISINFORMATION OVER THE JADAR PROJECT

Both Rio Tinto and some Western media have alleged that opposition to the mine has been fueled by global geopolitical competition over CRM. In a text for the Serbian daily Politika in September 2024, the CEO of Rio Tinto, Jakob Stausholm, alleged that the Jadar Mining project had been subject to an organized disinformation campaign³³. While he did not specify who was behind the campaign, he argued that “Never in the history of Rio Tinto, anywhere in the world, have we been exposed to so much misinformation and fake news as on this project.”³⁴

An article in the Wall Street Journal, published a few weeks later, claimed that “Russian disinformation” fueled the protests against the mining project. The primary evidence presented in the article is claims made by US Ambassador Chris Hill, an unnamed German official, and a State Department official.³⁵ The article was submitted as evidence of the lobbying efforts of the DC consultancy Yorktown, which has been hired by the Chamber of Commerce and Industry of Serbia to promote Serbian-US relations.³⁶ The role of the lobbying firm is unclear.

There is little evidence of Russia playing a significant role in spreading disinformation about the mining project.³⁷ For example, the Russian news and propaganda portal Sputnik reported about the mining plans and protests, engaging in particularly critical reporting. Instead, it described protests against the mining project. For example, Sputnik reported in August 2024, amid such protests, that Maria Zakharova, spokesperson of the Russian MFA, characterized the protesters as “ill-intentioned forces to activate the well-known destructive arsenal to destabilize the situation in Serbia.”³⁸ In a long interview, Sputnik discussed the project with Dejan Barjaktarović, President of the Society of Geological Engineers and Technicians of Serbia.³⁹ He also appeared on both pro-regime and independent media channels, and is somewhat critical of Rio Tinto, but favors the mining project. Similarly, RT Balkans, the Serbian online TV station of RT, reported regularly on government claims about disinformation campaigns. RT Balkans editor-in-chief Nikola Vrzić in his analysis claims that the West supports both the Rio Tinto mine and its critics so as to destabilize and weaken Vučić and render Serbia more com-

³³ “Rio Tinto CEO Says ‘Well-Organized’ Disinformation Targeting Serbian Lithium Project,” RFE/RL’s Balkan Service, September 15, 2025, <https://www.rferl.org/a/serbia-lithium-tinto-stausholm-mine/33120768.html>

³⁴ “Jakob Stausholm: Nikada više nismo bili izloženi dezinformacijama, trebalo je transparentnije,” Politika, September 7, 2024, <https://www.politika.rs/sr/clanak/631212/jakob-stausholm-nikada-vise-nismo-bili-izlozeni-dezinformacijama-treba-lo-je-transparentnije>

³⁵ Julie Steinberg and Georgi Kantchev, “This \$2.4 Billion Lithium Mine Is Caught Between Russia and the West,” Wall Street Journal, September 30, 2024

³⁶ U.S. Department of Justice, Foreign Agents Registration Act Registration, Yorktown Solutions, January 5, 2024, <https://efile.fara.gov/docs/6491-Exhibit-AB-20240105-39.pdf>

³⁷ Francisco Garcia, “The battle for the soul of Serbia,” The New Statesman, January 25, 2025, <https://www.newstatesman.com/international-content/2025/01/serbia-mining-protest-environment-lithium>

³⁷ Francisco Garcia, “The battle for the soul of Serbia,” The New Statesman, January 25, 2025, <https://www.newstatesman.com/international-content/2025/01/serbia-mining-protest-environment-lithium>

³⁸ “Litijum (ni)je bauk,” Sputnik, September 19, 2024, <https://lat.sputnikportal.rs/20240919/1177461985.html>

pliant to Western pressure.⁴⁰ This interpretation displays little understanding that the “West” is hardly a unitary actor promoting a coherent and singular policy. However, it highlights that Russia, which has supported Vučić and framed civil protests as potential ‘colored revolutions,’ can hardly openly support social movements against the mine project. Of course, this does not preclude more indirect support for critics of the project. Overall, Sputnik and RT Balkans have been less supportive of the Rio Tinto project than media closely linked to the regime, such as the tabloids and TV stations. Rather than the project as such, the company is often criticized. For example, RT Balkans has given space to the populist group “We—Power of the People,” led by conspiracy theorist Branimir Nestorović, who has been critical of Rio Tinto.⁴¹ However, the level of critique has been less than that of independent media such as N1, which does not rely on pro-Russian sources and actors. Thus, there is little indication that Russia has been a key source of disinformation.

In Serbia, far-right and nationalist opposition parties also opposed the mining project, similar to liberal, centrist, and green opposition parties. However, they add anti-Western and nationalist themes to their opposition.⁴² While these parties are pro-Russian, they played a marginal role in the protest movement and remained a minor force in the opposition overall. In the December 2023 parliamentary elections, the most prominent far-right party Dveri gained only 3.91% of the vote, whereas the centrist opposition coalition gained 14.09%.

Most importantly, blaming Russia for disinformation that contributed to the protest movement underplays local grievances. While some false claims and unsubstantiated fears were articulated at the protests, there is substantial evidence that the protest movement in Serbia against the lithium mining project is both homegrown and articulates legitimate, well-founded concerns about the project.

Rio Tinto has itself been confronting critics in a heavy-handed manner. In 2024, it requested the scientific journal *Scientific Reports*, part of the Nature group, to withdraw an article⁴³ by Serbian scientists warning about the environmental impact of the mine. The journal refused to withdraw the publication. Rio Tinto claimed to have conducted over “900 individual local

⁴⁰ “Vučićeva kvadratura kruga, ili: Senka CIA nad Balkanom,” RT Balkan, August 23, 2024, <https://lat.rt.rs/opinion/nikola-vrzic/105717-nikola-vrzic-senka-cia-balkan/>

⁴¹ “Nestorovićev pokret: “Rio Sava” već 20 godina nema bilo kakav ugovor sa Vladom Srbije,” RT Balkan, October 7, 2024, <https://lat.rt.rs/srbija-i-balkan/111905-mi-snaga-naroda-litijum-rio-sava-istrazno-pravo-zakon-skupstina/>

⁴² Luka Šterić, “Political Discourse on the Jadar Project. A Driver of Green Transition or a Colonial Tailings Dump?” Belgrade Centre for Security Policy, October 2023, <https://www.boell.de/en/2023/12/19/political-discourse-jadar-project>

⁴³ Dragana Đorđević, Jovan M. Tadić, Branimir Grgur, et al. “The influence of exploration activities of a potential lithium mine to the environment in Western Serbia,” *Sci Rep* 14, 17090 (2024). <https://doi.org/10.1038/s41598-024-68072-9>

⁴⁴ Ana Marković, Aleksandar Nastevski, “Rio Tinto nije uspeo da povuče tekst o štetnosti projekta “Jadar”: Studija srpskih naučnika prošla provere,” Nova.rs, October 22, 2024, <https://nova.rs/vesti/drustvo/saznajemo-rio-tinto-nije-uspeo-da-povuce-tekst-o-stetnosti-projekta-jadar-studija-srpskih-naucnika-prosla-provere/>

consultations, more than 30 group sessions” by 2021.⁴⁵ However, observers have noted that many citizens feel not well-informed, especially in the affected areas.⁴⁶

The government of Serbia, the project’s leading advocate, has been actively disseminating disinformation for years. Media under government control or owned by businesses close to the regime have been actively spreading disinformation about the protests against the lithium mining, including manipulating numbers of participants, photos, and videos, giving no voice to protestors, and also spreading fabricated stories.⁴⁷

CONCLUSIONS

Disinformation is not only spread by non-Western actors. As the case of the Rio Tinto lithium mining project in Serbia highlights, the Serbian government has been a major source of disinformation and Rio Tinto has both failed to encourage open debate in Serbia and implicitly endorsed the disinformation promoted by the Serbian authorities.

While, from an outside perspective, there is a temptation to interpret the critical mineral mining project through a geopolitical lens, this can be too short-sighted. Domestic concerns linked to the rule of law, democracy, and the environment can mobilize citizens irrespective of their geopolitical orientation. Tensions between the EU and the USA since the beginning of Donald Trump’s second term have led the EU to become even more focused on its own supply of CRMs and to rely less on the USA as a partner. In fact, Trump’s claims to Greenland are largely motivated by CRMs in Greenland. Thus, the US risks becoming a competitor for the EU.⁴⁸

This likely further shifts the priority in the field of CRM from green deal and governance to securing an autonomous supply for the EU. A security-driven agenda might be understandable, but it risks undermining environmental and governance-related considerations. There is extensive literature on the negative effects of extractive economic activities on governance, especially in countries with weak institutions and fragile democracies. The economic benefits

⁴⁵ “Rio Tinto’s response to briefing “You can’t eat lithium”: Community consent and access to information in transition mineral mining exploration,” Business and Human Rights Center, n.d., <https://www.business-humanrights.org/en/from-us/transition-minerals-tracker/rio-tintos-response-to-briefing-you-cant-eat-lithium-community-consent-and-access-to-information-in-transition-mineral-mining-exploration/>

⁴⁶ “Business & Human Rights Resource Centre “You can’t eat lithium”: Community consent and access to information in transition mineral mining exploration, 2021, <https://www.business-humanrights.org/en/from-us/briefings/tmt-2021/you-cant-eat-lithium-community-consent-and-access-to-information-in-transition-mineral-mining-exploration-in-europe-and-north-america/>

⁴⁷ Jelena Kleut, “Mapping disinformation in the Serbian media Research Report,” CRTA, 2022, https://cрта.rs/wp-content/uploads/2023/01/Mapping-disinformation-in-Serbian-media_2020.pdf

⁴⁸ Marzia Sesini, “Trump and the EU’s Critical Raw Materials Dilemma: A New Era of Supply Chain Vulnerability,” Florence School of Regulation, EUI, April 23, 2025, <https://fsr.eui.eu/trump-and-the-eus-critical-raw-materials-dilemma-a-new-era-of-supply-chain-vulnerability/>

are often siphoned off by elites and used to buy loyalty among critical supporters.⁴⁹ Thus, the extraction of CRMs is particularly prone to reinforcing bad governance and authoritarian structures. Citizens of the Western Balkans have been organizing over environmental concerns for over a decade. This developed in the context of opposition to small hydroelectric power plants that often lacked necessary permits and/or had a considerable impact on the environment. The destruction of the environment has become one of the most visible facets of state capture and bad governance in the Western Balkans.⁵⁰ As a result, citizens have displayed low trust in large-scale mining projects in the Western Balkans. This opposition is grounded in a track record of environmental degradation, either based on the lack of governmental oversight or with the explicit collusion of governments. The protests in Serbia against the lithium mining project in the Jadar valley are not the only protest movements, but environmental groups and protests have opposed lithium mining in Bosnia and Herzegovina⁵¹ and in North Macedonia.⁵² These protests cannot be reduced to either Russian or other disinformation campaigns or NIMBYism (Not in My Backyard). As a result, the EU is unlikely to successfully pursue the policy of securing CRMs in the Western Balkans without ensuring the support of and consultation with Western Balkan citizens. Governments have demonstrated their unwillingness to consult citizens and provide for serious environmental, social, and governance safeguards. CRM projects thus provide a potent point of social mobilization against state capture and bad governance practices. Thus, EU support for CRM projects in the Western Balkans (and beyond) without particular regard for governance and environmental standards carries three risks:

- 1.** Undermining rule of law standards as governments prefer conducting projects with little regard to environmental, social and governance standards.
- 2.** Reducing citizens' trust in CRM projects and by extension, undermining support for the EU and enlargement in the Western Balkans.
- 3.** Sabotaging CRM projects themselves as they become symbols of state capture and governments are either unwilling to pursue the projects or the long-term sustainability is questionable.

If the CRMA seeks to build partnerships with third countries on the extraction of CRMs, the EU needs to incorporate strategies to facilitate good governance and environmental standards to avoid the 'resource curse' dilemma. While other global actors, such as China, are less concerned with good governance, this is only a short-term advantage. Bad governance can provoke substantial citizen opposition to projects, resulting in their eventual failure and deep-

⁴⁹ Michael L. Ross, "What Have We Learned about the Resource Curse?" *Annual Review of Political Science*, 18 (2015), 239-259

⁵⁰ Aida Kapetanovic, "From local streams to regional dreams: envisioning a just green transition in the Western Balkans." *Balkan Research Journal*, 1(2) (2025), 1-14.

⁵¹ "Locals defy lithium mining plans on Mount Majevisa," *Balkan Green Energy News*, May 13, 2025, <https://balkangreenenergynews.com/locals-defy-lithium-mining-plans-on-mount-majevisa/>

⁵² Sanja Mlađenović Stević, Aleksandar Samardžijev, "Western Balkans: Europe's future mining colony?," *Osservatorio Balcani e Caucaso Transeuropa*, June 28, 2024, <https://www.balcanicaucaso.org/eng/Areas/Balkans/Western-Balkans-Europe-s-future-mining-colony-232179?>

ening autocratization and political instability. These all undermine the EU strategic interests. While this applies to all strategic projects of the EU outside the EU itself, it is even more pertinent in accession countries. If strategic projects and the overall CRM approach are not integrated into the EU enlargement approach, there is a high risk that these two policies conflict and mutually weaken each other.

Thus, pursuing CRM projects in the Western Balkans without enhanced environmental, social, and governance standards risks undermining the EU and the projects themselves. Currently, the EU CRM policy is not linked to enlargement policies and lacks a robust governance component.⁵³ To make CRM projects viable in the Western Balkans, the EU needs to explicitly link CRM strategic projects to enlargement conditionality and establish systems to ensure monitoring, public consultation, and transparency.

POLICY RECOMMENDATIONS

Disinformation is not only spread by non-Western actors. As the case of the Rio Tinto lithium mining project in Serbia highlights, the Serbian government has been a major source of disinformation and Rio Tinto has both failed to encourage open debate in Serbia and implicitly endorsed the disinformation promoted by the Serbian authorities.

- 1.** Link EU enlargement policies and the Critical Raw Materials Act to include the environmental and rule-of-law acquis vis-à-vis strategic projects. This would allow for synergies between these two EU-led approaches rather than one undermining the other. It would facilitate the long-term sustainability of CRM projects in accession countries.
- 2.** Include governance, environmental conditionality, and public consultations for strategic CRM projects. High standards might create initial delays, but reduce the leverage of individual governments vis-à-vis the EU and ensure that the project will not interfere with EU accession processes.
- 3.** Create institutional safeguards within countries and external monitoring to ensure compliance with the EU environmental and rule-of-law acquis. In the context of state capture and autocratization in several countries of the Western Balkans, monitoring mechanisms and other safeguards are needed as governments are unable and/or unwilling to monitor the extraction of CRMs. Thus, the EU cannot rely solely on local governments. Inclusive and robust monitoring regimes are the only way to secure citizen support.

⁵³ Ana Krstinovska, André Wolf, "Raw Materials for a Resilient Europe: The EU's Strategic Partnership with the Western Balkans," ELIAMEP, think nea – New Narratives of EU Integration, Thematic Report No. 3. October 2025

ABOUT THE AUTHOR

Florian Bieber is a Professor of Southeast European History and Politics and Director of the Centre for Southeast European Studies at the University of Graz, Austria. He is the coordinator of the Balkans in Europe Policy Advisory Group (BiEPAG) and has been providing policy advice to international organizations, foreign ministries, donors, and private investors.



CHAPTER 3

LEGAL AND ENVIRONMENTAL ASPECTS OF MINING IN THE WESTERN BALKANS

**Jovan Rajić, Darjana Macanović, Mirko Popović, Jovan Cvijetinić,
Ivana Milićević, Hristina Vojvodić, Ljubica Vukčević**



INTRODUCTION

The mining sector has long played a pivotal role in the economic development of the Western Balkans, a region endowed with substantial deposits of minerals such as lignite, copper, lead, zinc, and precious metals. From the industrial legacy of the former Yugoslavia to the contemporary resurgence of foreign direct investment, mining continues to shape national economies, energy security, and regional trade. However, alongside its economic potential, mining raises complex legal challenges that sit at the intersection of environmental protection, property rights, investment law, and governance reform.

In the post-socialist transition period, Bosnia and Herzegovina, Montenegro, North Macedonia, and Serbia have undertaken substantial legal and institutional reforms to modernize their mining frameworks. These reforms have been driven by multiple factors: the need to attract international investors, the harmonization of domestic legislation with European Union acquis, and increasing public scrutiny regarding environmental and social impacts. As a result, the legal landscape governing mining in the region is both dynamic and fragmented, reflecting varying stages of regulatory development and differing national priorities.

A central legal issue in the region concerns the ownership and concession of mineral resources. Most Western Balkan jurisdictions maintain state ownership over subsoil resources, granting exploration and exploitation rights through licensing or concession regimes. These regimes are typically governed by mining laws supplemented by regulations on environmental protection, land use, water management, and public procurement. Over the last decade, environmental and social considerations have emerged as key dimensions of mining law in the region. The legacy of past mining activities, often associated with inadequate environmental safeguards, has heightened awareness of ecological risks, including land degradation, water contamination, and air pollution. Contemporary legal frameworks increasingly incorporate environmental impact assessments, public participation requirements, and remediation obligations. Nevertheless, enforcement gaps and institutional weaknesses remain key challenges, raising questions about the effectiveness of legal protections in practice.

Another important aspect is the alignment of national mining legislation with EU standards. Although not all Western Balkan countries are EU member states, most are either candidates or potential candidates, and thus engaged in approximation processes. This alignment affects areas such as environmental law, competition law, state aid rules, and occupational health and safety standards. The integration process introduces both opportunities for legal modernization and tensions between domestic economic priorities and supranational regulatory expectations.

Furthermore, the governance of mining activities is closely linked to issues of transparency, anti-corruption, and community rights. Civil society organizations and local communities have increasingly challenged mining projects, particularly where concerns arise over land expropriation, environmental degradation, or insufficient consultation. Legal mechanisms for dispute

resolution – both domestic and international, including investor-state arbitration – play a crucial role in shaping the outcomes of such conflicts.

This chapter examines the legal aspects of mining in the Western Balkans through a comparative and interdisciplinary lens. It seeks to analyze the contemporary evolution of mining legislation, assess the effectiveness of regulatory frameworks, and identify key challenges and opportunities for reform. The primary focus is on Serbia and to some extent on Bosnia and Herzegovina. By situating national legal systems within broader regional and international contexts, the chapter aims to contribute to a deeper understanding of critical regulatory and legal dilemmas and of the questions of how law can potentially support sustainable and equitable resource development in the Western Balkans.

I LEGAL ASPECTS OF MINING IN SERBIA

The umbrella legal act regulating the field of mining in the Republic of Serbia is the Law on Mining and Geological Explorations (hereinafter: “Mining Law”), first adopted in 2015, and has since undergone amendment procedures on two occasions, in 2018 and 2021.¹ The Mining Law defines the framework for: mineral policy and development of geological explorations, classification of resources and reserves (mineral, water, geothermal), exploitation of reserves and other geological resources, construction, use and maintenance of mining facilities, the conduct of mining operations, mining waste management, site remediation and recultivation, and supervision of regulatory implementation.

Additionally, the Constitution of the Republic of Serbia² defines the ownership status of natural resources, and thus ores and mineral resources, in the following manner:

“Natural resources, goods designated by law to be of general interest, and property used by organs of the Republic of Serbia are in state ownership. The state may also own other things and rights, in accordance with the law. Natural and legal persons may acquire individual rights over specific goods in general use, under conditions and in the manner prescribed by law.”

In practical terms, this means that specific rights over such goods may be granted to natural and legal persons in accordance with the law, but such rights must necessarily be narrower than ownership rights,³ which are in any case reserved exclusively for the Republic of Serbia.⁴

¹ Law on Mining and Geological Explorations [in Serbian] (“Official Gazette of RS”, nos. 101/2015, 95/2018 and 40/2021).

² Constitution of the Republic of Serbia [in Serbian] (“Official Gazette of RS”, nos. 98/2006 and 115/2021); Article 87.

³ The authors of this analysis believe the Constitution’s use of “state ownership” is imprecise from a legal and linguistic perspective. The article refers to ownership rights, which are property rights, but not the only such rights. Ownership rights are thus narrower in scope than property rights generally. However, the article’s intended meaning is the state’s exclusive ownership right (not some other property right) over goods of general interest.

⁴ Law on Public Property [in Serbian] (“Official Gazette of RS”, nos. 72/2011, 88/2013, 105/2014, 104/2016, 108/2016, 113/2017, 95/2018, 153/2020 and 94/2024).

Article 4, paragraph 2(5) of the Mining Law explicitly prescribes that boron and lithium ores fall (together with oil, natural gas, coal, copper, gold, lead and zinc) into the category of mineral raw materials of strategic importance for the Republic of Serbia. The Mining Law does not provide a definition of the term “strategic importance,” though a few provisions of the law prescribe a specific status for such raw materials compared to others. For example, in the case of mineral raw materials of strategic importance, the period during which exploration rights may be retained can be extended by up to one year.⁵ The Law also prescribes that, to protect the strategic interest of the Republic of Serbia, a special act of the Government will designate a ministry representative as the representative of state interest in companies with state capital that conduct applied geological research and exploitation of mineral raw materials of strategic importance.⁶ Academic literature indicates that *there is no universal consensus on how to define the “criticality” of these raw materials, as it changes over time depending on societal needs and supply availability. Also, it emphasizes that the term “critical minerals” is not formally defined in our country. Critical or deficient mineral raw materials are understood to be those mineral raw materials with which a particular country or region is not fully or is only partially supplied.*⁷

The draft Strategy for Managing Mineral and Other Geological Resources of the Republic of Serbia (discussed further below) states that Serbia has great potential for producing critical and strategic minerals. These are important for the country’s role as a strategic ally and partner of the European Union. The Government should be a stable long-term supplier of minerals for the green transition.⁸ However, it also states that in the coming period the Republic of Serbia has yet to “establish a methodology for defining its critical mineral raw materials”.⁹

Unfortunately, this leads to the conclusion that the Republic of Serbia still lacks awareness or vision regarding its own (“strategic”) needs. At the same time, it recognizes the possibility of becoming a “stable long-term supplier” of these raw materials to countries with stronger economies and industries, based on reserves that are recognized as strategic primarily in the EU.

According to Article 5 of the Mining Law, geological explorations, exploitation of mineral raw material reserves and resources, and the use and maintenance of mining facilities must be conducted based on an optimal geological and technical and economic approach, with protection of human health, property and the environment, in accordance with contemporary standards. This is a notably flexible formulation, susceptible to equally flexible interpretations

⁵ Law on Mining and Geological Explorations [in Serbian], Art. 40, para. 4.

⁶ Ibid. Art. 4, para. 7.

⁷ Carević I, Batočanin N, Petrović AS, Srejić T, Sibinović M, Manojlović S., “Critical Mineral Raw Materials and Contemporary Technological Development - A Challenge for Green Energy Transition” [in Serbian], Planned and Normative Protection of Space and Environment; University of Belgrade - Faculty of Geography, Belgrade, 2024, p. 48.

⁸ Draft Strategy for Managing Mineral and Other Geological Resources of the Republic of Serbia for the period from 2025 to 2040, with projections to 2050 [in Serbian], <https://www.mre.gov.rs/extfile/sr/10833/Nacrt%20Strategije%20upravljanja%20mineralnim%20i%20drugim%20geoloskim%20resursima.pdf>, accessed August 28, 2025, p. 60.

⁹ Ibid., p. 19.

and abuses by investors. It thus appears that compliance with this provision and definition of 'optimal' is left to the discretion of investors and weak state oversight, which is best reflected in the conduct of inspection authorities.¹⁰

Moreover, it states that the entire legal framework should be interpreted through several principles when applied to these activities: ensuring continuous supply of mineral raw materials for market economy stability; balancing geological explorations and exploitation with economic, social and ecological considerations; obliging rights holders to act according to "the best business, social and ecological professional standards"; applying the best technical methods for protection and damage reduction; and guaranteeing the security, predictability and continuity of exploration and mining rights.¹¹

The Law prescribes which entities and under what conditions are permitted to conduct exploitation. Thus, exploitation works may be carried out by business entities (companies, other legal entities, and entrepreneurs) registered in the appropriate registry (the Register of Companies at the [Business Registers Agency](#)).¹² The holder of exploitation rights must ensure professional supervision, which includes: control according to the project and work schedule, quality verification and application of regulations, safety supervision, fire protection, environmental protection, cultural heritage protection and water facility protection.¹³

For the purposes of exploitation, it is necessary for the investor to obtain three types of permits: i) for the exploitation field or exploitation, ii) for the construction of mining facilities and/or conducting mining operations, and iii) for the use of mining facilities.¹⁴ All permits are issued by the Ministry (or the body of the autonomous province),¹⁵ depending on the location where the project is being implemented.

For the exploitation of mineral raw material resources and reserves that are of importance to the Republic of Serbia, it is mandatory to develop a long-term exploitation program for a period of at least ten years, which serves as the expert basis for the development of a special purpose area spatial plan.¹⁶

The Law specifically prescribes that expropriation of real estate may be carried out for the needs of a business entity, in private or public ownership, that holds exploration rights and/or

¹⁰ See: Nikola Gagić, Guidelines for Improving the Legal Framework and Recommendations of Good Practice for Implementing Inspection Supervision in the Field of Environment in the Republic of Serbia [in Serbian]; RERI, July 2022;

¹¹ Law on Mining and Geological Explorations [in Serbian] ("Official Gazette of RS", nos. 101/2015, 95/2018 - other law and 40/2021), Art. 2.

¹² Ibid., Art. 67.

¹³ Ibid.

¹⁴ The Law and bylaws define the procedure for obtaining the relevant permits and the documentation that must be attached to the application, but due to the limited scope of this analysis it is not possible to describe the entire procedure in more detail.

¹⁵ Ibid., Art. 68.

¹⁶ Ibid., Art. 88.

holds the right of exploitation of mineral raw materials classified as materials of importance to the Republic of Serbia.¹⁷ In that case, such a business entity holds the rights and obligations of an expropriation beneficiary,¹⁸ and expropriation is defined in detail by the Law on Expropriation.¹⁹ This legal provision is problematic in itself and appears to contradict the Constitution's provision cited above. Limiting property rights in private interest contradicts the very concept of the inviolability of private property. This contradiction is further reinforced by the provision on exclusive state ownership of natural resources and goods of general interest. Consequently, the introduction of such a provision into the Law on Expropriation is problematic from several angles, both from a legal-theoretical and practical perspective.

These laws have so far served in practice as the basis for companies to obtain expropriation beneficiary status in an expedited manner for the purposes of exploiting mineral raw materials of special importance. This has often led to violations of the right to private property and other human rights, including situations in which mining operations commence on disputed land before the compensation decision becomes final. The Law on Expropriation stipulates that property may be handed over before the compensation decision becomes final only in urgent cases.²⁰ What is manifestly clear, and frequently overlooked, is the fact that the construction of mines for the purpose of generating profits for private companies cannot be considered an urgent case.²¹

The Mining Law designates the Strategy for Managing Mineral and Other Geological Resources of the Republic of Serbia ("Strategy") as a strategic mineral policy document and development plan for geological explorations and mining. The Strategy is adopted for at least ten years. Its purpose is to establish general objectives for developing mining and geological exploration of energy, metallic, non-metallic and technogenic mineral raw materials, underground waters and geothermal resources.²² The Republic of Serbia currently does not have a valid Strategy, though a public consultation procedure on the draft Strategy was conducted in early August 2025.²³

The draft Strategy states: "Serbia's strategically important metallic mineral resources include copper, gold, lead, zinc, silver and lithium. Their development through 2040, with projections to 2050, entails a series of activities aimed at increasing the total quantities of strategically important mineral resources, a reliable assessment of their current quantities, quality and

¹⁷ Ibid., Art. 4, para. 5.

¹⁸ Ibid., Art. 4, para. 6.

¹⁹ Law on Expropriation [in Serbian] ("Official Gazette of RS", no. 53/95, "Official Gazette of FRY", no. 16/2001 - decision of the FCC and "Official Gazette of RS", nos. 20/2009, 55/2013 - decision of the CC and 106/2016 - authentic interpretation).

²⁰ Ibid., Art. 35.

²¹ "Expropriation for Čukaru Peki: How Zijin is Trying to Pay Less for Land" [in Serbian] (CINS), <https://www.cins.rs/eksproprija-cija-za-cukaru-peki-kako-zidjin-pokusava-da-plati-manje-za-zemlju/>, accessed August 29, 2025.

²² Law on Mining and Geological Explorations [in Serbian], Art. 12.

²³ Ministry of Mining and Energy, "Public Consultation on the Draft Strategy for Managing Mineral and Other Geological Resources of the Republic of Serbia" [in Serbian], August 7, 2025, <https://www.mre.gov.rs/vest/11751/javna-rasprava-o-na-rtu-strategije-upravljanja-mineralnim-i-drugim-geoloskim-resursima-republike-srbije.php>.

possibilities for economic valorization”.²⁴ It further notes that lithium belongs to “critical mineral raw materials that the EU has classified as deficit minerals”.²⁵ The Jadar deposit near Loznica is particularly highlighted, where proven reserves of 158 million tonnes of ore have already been confirmed, and the draft provides several scenarios for the development of the mining sector. Thus, in the “accelerated development” variant, the draft envisions opening a lithium mine with annual production of up to 58,000 tonnes of lithium carbonate. This mine would represent a key driver of increasing mining’s share in GDP (from the current 2.7% to a potential 5–8%), along with growth in foreign direct investment and additional multiplier effects on employment, services and taxes.²⁶ It also states that the Government of the Republic of Serbia should strive for the role of a stable and long-term supplier to the European Union of minerals critical to the green transition.²⁷ The document also identifies risks that could jeopardize achieving the Strategy’s objectives. These include: an underdeveloped regulatory framework, incomplete supervision capacities, low public awareness about mineral resources’ importance for economic development, disagreements between non-governmental organizations and environmental movements regarding mining, and the presence of environmentally threatening activities.²⁸

II LEGAL ASPECTS OF MINING IN BOSNIA AND HERZEGOVINA

Substantial impacts of mining activities on the environment and citizens’ rights require this area to be precisely and comprehensively regulated at both the legislative and regulatory levels. However, existing laws in Bosnia and Herzegovina are largely inadequate to address the development of the mining industry, impacts on fundamental human rights, or contemporary challenges in practice, and do not provide appropriate protection of the environment and citizens’ rights.²⁹ Vague and incomplete legal provisions leave room for abuses and tendentious interpretations that in practice place the private interests of investors above the public interest.

²⁴ Draft Strategy for Managing Mineral and Other Geological Resources of the Republic of Serbia for the period from 2025 to 2040, with projections to 2050 [in Serbian], <https://www.mre.gov.rs/extfile/sr/10833/Nacr%20Strategije%20upravljanja%20mineralnim%20i%20drugim%20geoloskim%20resursima.pdf>, accessed August 28, 2025, p. 53.

²⁵ Ibid., p. 54.

²⁶ Ibid., pp. 53, 58-59.

²⁷ Ibid., p. 60.

²⁸ Ibid., p. 61.

²⁹ The key laws regulating this area that were the subject of analysis are the Law on Geological Explorations of the Federation of Bosnia and Herzegovina [in Bosnian] (“Official Gazette of FBiH” nos. 9/10 and 14/10), the Law on Geological Explorations of Republika Srpska [in Serbian] (“Official Gazette of RS” nos. 64/22 and 63/24), the Mining Law of the Federation of Bosnia and Herzegovina [in Bosnian] (“Official Gazette of FBiH” no. 26/10), the Mining Law of Republika Srpska [in Serbian] (“Official Gazette of Republika Srpska” no. 62/18).

Responsible management of mineral resources requires an adequate strategic framework grounded in social dialogue. The key strategic document in this area is a strategy for managing mineral resources, which establishes the objectives for the development of mining and geological explorations, and measures and activities for their achievement. However, in both the Federation of Bosnia and Herzegovina and Republika Srpska, such a strategy has not yet been adopted.³⁰ Although the Development Strategy of the Federation of BiH, adopted for the period up to 2027, envisages the development of a Mineral Raw Materials Management Strategy, this document has not been adopted to date, while Republika Srpska has not adopted a valid Development Strategy.³¹ A particular problem is the absence of the highest-level planning document in the area of spatial planning, given that the Spatial Plan developed for the period from 1981 to 2000 is still in force in the Federation of BiH.³²

Excessively broad exceptions regarding the conversion of agricultural and forest land carry a considerable risk of abuse in the context of mineral raw material exploitation. Namely, although the Law defines agricultural land as a natural resource of general interest subject to a special protection regime, the Law on Agricultural Land provides for exceptions that allow temporary conversion of this land for the purposes of surface exploitation of industrial mineral raw materials.³³ The existing law allows even the highest quality agricultural land to be designated for the construction of facilities for surface mining of industrial and other mineral raw materials – a particularly concerning provision.³⁴ The situation is similar when it comes to the conversion of forest land. Of particular concern is the absence of a valid Law on Forests in the Federation of BiH. Meanwhile, the Republika Srpska Law on Forests, although it defines forests and forest land as natural assets of general interest under special protection and stipulates

³⁰ The Decision on the Development of a Mineral Raw Materials Management Strategy in Republika Srpska was adopted at the beginning of 2023, and in the Federation of BiH in April 2024. More information available at: <https://fbihvlada.gov.ba/bs/334-odluka-o-izradi-strategije-upravljanja-mineralnim-sirovinama-u-federaciji-bosne-i-hercegovine-do-2030-godine-sa-projekcijom-do-2050-godine> and <https://www.vladars.net/sr-SP-Cyrl/Vlada/Premijer/Media/Vijesti/Pages/Odrzana-14.-sjednica-Vlade-.aspx>.

³¹ Development Strategy of the Federation of Bosnia and Herzegovina 2021-2027 [in Bosnian], available at https://parlamentfbih.gov.ba/v2/userfiles/file/Materijali%20u%20proceduri_2021/Strategija%20razvoja%20FBiH%202021-2027_bos.pdf.

³² The Government of the Federation of BiH submitted in July 2025 a Draft Decision on Commencing the Development of a Spatial Plan of the Federation of BiH for a period of 20 years with a development deadline of 18 months from the date of signing the contract for its development. Draft Decision on Commencing the Development of the Spatial Plan of the Federation of BiH [in Bosnian], available at <https://fmpu.gov.ba/prostorno-planiranje/prostorni-planovi/> and https://parlamentfbih.gov.ba/v2/userfiles/file/Materijali%20u%20proceduri_2025/1469-25%20Prijedlog%20Odluke_prostorni_plan.pdf.

³³ Articles 2 and 47 of the Law on Agricultural Land of the Federation of BiH [in Bosnian] (“Official Gazette of FBiH”, no. 52/09). Concession contracts for the exploitation of industrial mineral materials are concluded for periods of several decades, meaning such arrangements cannot be considered temporary changes of use of agricultural land, but rather a permanent conversion with a high probability of land contamination that renders future agricultural use impossible.

³⁴ Article 48 of the Law on Agricultural Land of the Federation of BiH [in Bosnian] prescribes that, as an exception, major infrastructure may be built on agricultural land from the 1st to the 4th productivity categories, but only when there are no other possibilities, when required by the general interest as determined by the cantonal government, and when no less valuable agricultural land exists. Article 8, paragraph 1 (23) prescribes that major infrastructure of general interest includes: roads, railways, airports, hydroelectric reservoirs, water management facilities for flood protection, and facilities for surface mining of industrial and other mineral materials.

that the total area of forests owned by Republika Srpska cannot be reduced, simultaneously provides for exceptions that allow forest clearing and permanent conversion of forest land.³⁵ Namely, the existing legislative framework allows forest clearing and permanent conversion of forest land for implementing spatial planning documents and location requirements, once the relevant authority officially establishes public interest. It also permits such conversion for executing concession contracts.³⁶ Such a legal provision in practice opens the door for forest land to be permanently converted in all cases where this is necessary for the purposes of mineral resource exploitation, provided that a concession contract has been previously concluded. Broadly defined exceptions applied under vague and imprecise criteria are routinely abused in practice, effectively undermining the basic legal provisions for which those exceptions were prescribed.

POTENTIAL FOR ABUSE OF LEGAL PROVISIONS ON CONCESSIONS

In the territory of BiH, mining and geological exploration activities may only be conducted on the basis of concessions. However, the regulatory framework in this area has numerous shortcomings, particularly regarding how concessions are awarded and the broad freedom of contracting in individual concession agreements with inadequate legal constraints. In both the Federation of BiH and Republika Srpska, concessions are awarded through public tenders and unsolicited proposals.³⁷ However, although both laws stipulate that concessions through unsolicited proposals should be awarded only in exceptional cases, this practice has become the norm rather than the exception.³⁸ All concession contracts concluded to date in the Federation of BiH have been based on unsolicited proposals, and this model of contract conclusion is also dominant in Republika Srpska.³⁹ The legislative framework facilitates this, with the Law on Concessions of Republika Srpska providing for a number of exceptions in which a concession may be awarded through an unsolicited proposal. These include cases where the applicant is a public enterprise or public institution performing activities of general interest, or a legal entity that has previously conducted mineral exploration whose exploration work value exceeds a certain threshold.⁴⁰ The award of concessions through direct negotiations, without a public tender, fails to ensure greater value for money, stronger environmental safeguards, or equal treatment of economic operators, and is contrary to the basic EU principles of transparency.⁴¹

³⁵ Articles 2 and 3 of the Law on Forests of RS [in Serbian] (“Official Gazette of RS”, nos. 75/08, 60/13, 70/20 and 49/22).

³⁶ Article 42 of the Law on Forests of RS [in Serbian].

³⁷ Articles 23 and 28 of the Law on Concessions of the Federation of BiH [in Bosnian] (“Official Gazette of the Federation of BiH”, nos. 40/02 and 61/06) and Article 11 of the Law on Concessions of Republika Srpska [in Serbian] (“Official Gazette of Republika Srpska”, nos. 59/13, 16/18, 70/20 and 111/21).

³⁸ Article 28 of the Law on Concessions of FBiH [in Bosnian] and Article 26 of the Law on Concessions of RS [in Serbian].

³⁹ Information on concluded contracts is available in the reports on the work of the Concessions Commission of RS [in Serbian], <https://koncesije-rs.org/category/izvjestaji/>.

⁴⁰ Article 26, paragraph 1 of the Law on Concessions of RS [in Serbian].

⁴¹ Transparency International Bosnia and Herzegovina, “[The Concessions System in Bosnia and Herzegovina - Legal and Institutional Framework](#)” [in Bosnian], 2024.

An additional problem with unsolicited proposals is the absence of a clearly defined public interest that must be established, which leaves broad room for discretionary decision-making, thereby enabling in practice that every mineral resource exploitation project be declared a project of public interest.

The main reason for concessions is to enable implementation of public interest projects through private capital investment when budget funds are insufficient. Precisely because of this, the concession regime requires clearly defined legal frameworks that ensure the protection of public interest and limit freedom of contracting in individual concession contracts. However, the existing laws do not contain adequate and sufficient contracting limitations but instead give the contracting parties broad discretion to regulate key contract provisions. Given the unique nature of mining concession contracts and their long-term duration, such a legal provision carries significant risk, as it allows the most important legal provisions to favor the investor, without effective legal mechanisms for protecting public interest. Thus, although the existing legal provisions provide for framework regulation of the duration of concession contracts, they do not prescribe criteria for establishing the optimal validity period for each specific case, nor do they prescribe the minimum annual fee for concessions in the field of mining, or the method and criteria for setting it.⁴² A particular risk is the lack of an obligation to update concession fees to reflect changes in laws and regulations - especially problematic given that such changes are inevitable over multi-decade concessions. The Law on Concessions of the Federation of BiH does not regulate harmonization of concession fees at all. Republika Srpska's Law on Concessions provides for fee harmonization only as a possibility, not an obligation. If the concessionaire does not agree with an amendment, the fee remains unchanged for the concession's duration.⁴³ In such circumstances, there is a risk that the concession fee will remain unchanged throughout the entire duration of the concession, and such contracts are unequivocally detrimental to public interest and economically profitable for investors.

Analysis of the existing legal framework in the field of geological explorations and mining in Bosnia and Herzegovina indicates that legal provisions are shaped in favor of investors, while simultaneously reducing their liability for the consequences of exploration and mining activities and weakening mechanisms for protecting public interest and the human rights of affected communities. Thus, the obligation to provide a financial guarantee before the start of geological explorations and exploitation represents a standard preventive mechanism that ensures responsible conduct by investors and protection of public interest. This mechanism, however, is not recognized in the existing mining legislation of Bosnia and Herzegovina, which does not require holders of explorations and exploitation rights to provide financial guarantees for the remediation and recultivation of land that may be degraded by their activities. The absence of mandatory security before mining activities begin creates no incentive for compliance with prescribed criteria, technical standards and professional rules, but rather enables investors to abandon degraded areas after completion without facing real consequences. Misdemeanor sanctions available to relevant authorities in such cases are neither proportionate to the po-

⁴² Article 29 of the Law on Concessions of FBiH [in Bosnian] and Article 28 of the Law on Concessions of RS [in Serbian].

⁴³ Article 29 of the Law on Concessions of RS [in Serbian].

tential damage, nor do they provide the funds necessary for remediation and recultivation, thereby shifting the burden of remediating negative environmental consequences onto the state and local communities. Even the key mechanism of environmental impact assessment, which should ensure the protection of the environment and citizens' health, as well as public participation and information about potential environmental impacts, is not mandatory in the earliest phase, when permits for geological explorations are issued.

A clear pattern of restricting civil liberties can be observed in the recent amendments to the Law on Geological Explorations of Republika Srpska, which enable the extension of exploration rights even when the holder has not conducted explorations to the prescribed extent, whereby protests are also recognized as "force majeure".⁴⁴ In this way, the exercise of fundamental civil liberties is formally treated as an obstacle to investment, while the already broadly and imprecisely defined conditions for extending exploration rights are further expanded in favor of investors. On the other hand, the existing laws regulating geological explorations and mining do not ensure the right of the interested public to participate as a party in decision-making procedures regarding activities that may have a major impact on the environment, and thus effectively influence and challenge decisions made in those procedures. Challenging decisions in Republika Srpska is further complicated by procedural restrictions. For all decisions made under the Law on Geological Explorations, a two-tier appeals system is excluded, limiting legal protection exclusively to administrative litigation without suspensive effect.⁴⁵ This enables investors to conduct geological explorations and mining activities unimpeded while the legality of decisions is reviewed in lengthy court proceedings. Bearing in mind the considerable consequences that these activities can have on the environment and the rights of affected communities, the right to appeal against administrative acts should represent the rule, not the exception.

The problem of supervision over the work of mining companies is reflected in unclearly and insufficiently precisely regulated powers of inspectors, which in practice can lead to failure to identify illegalities and inconsistent application of regulations. Such normative incompleteness undermines the effectiveness of supervision, legal certainty and enables potential abuses. Moreover, considering the possible consequences for human health and the environment from mining law violations and illegal geological explorations and exploitation, the penal policy is inadequate and effectively encourages investors to operate illegally. It should be particularly noted that neither the Mining Law of the Federation of BiH nor the Mining Law of RS prescribe criminal offenses for serious violations, containing only misdemeanor provisions with symbolic monetary fines. As expected, penalties in these ranges provide insufficient incentive for companies to comply with regulations. Therefore, it comes as no surprise that it is often more economically profitable for a company to begin mineral exploitation or mining facility construction before obtaining a permit from the relevant authority. On that basis, it generates daily profits in amounts many times greater than the prescribed monetary fine, and in the event that it is convicted of a misdemeanor, it pays a negligible monetary fine. Therefore, a

⁴⁴ Article 38, paragraph 1 of the Law on Geological Explorations of RS [in Serbian].

⁴⁵ Articles 36, 38, 43, 48a, 52 and 65 of the Law on Geological Explorations of RS [in Serbian].

stricter and clear penal policy in the field of mining is necessary to achieve both specific deterrence (influencing individual investors), and general deterrence (deterring other companies from violating the law).

Expropriation procedures linked to mining projects represent one of the most common, but also most serious forms of interference with citizens' rights, with far-reaching consequences for the realization of fundamental human rights, and often serve as a clear indicator of the true state of the rule of law in a country. Due to its nature, expropriation produces not only legal, but also serious social and economic consequences, especially in situations when procedures last for years, during which owners are deprived of their property and means of livelihood. Given the intensity and permanence of the consequences it produces, and the tendency to generally manipulate this sensitive and complex matter, it is necessary to regulate this matter restrictively, carefully and in detail. Consequently, one of the greatest risks in the existing legislative framework is the following: Although the Federation of BiH's Law on Expropriation does not explicitly allow expropriation in favor of private companies, the provision stating that expropriation is allowed "unless otherwise provided by law" creates a loophole. This formulation leaves room for other special laws, such as mining laws, to effectively introduce this possibility.⁴⁶ Such a broad legislative approach enables the expansion of the concept of public interest in a way that favors private investors, which, as experience from the Republic of Serbia shows, can lead to systematic derogation of the protection of citizens' rights and subordination of public to private interest.

III THE LEGAL FRAMEWORKS UNDERPINNING THE EU GREEN AGENDA AND THE CRITICAL RAW MATERIALS REGULATION

The [European Green Deal](#) is the Union's key policy framework for achieving climate neutrality by 2050, and its primary vehicle for implementing the United Nations 2030 Agenda and the Sustainable Development Goals.⁴⁷

The fundamental intention of the European Green Deal is to establish a systematic framework in which issues of sustainability and citizens' well-being are placed at the center of economic development and policy-making. This commits the EU to transforming numerous economic sectors – from energy and industry to transport and agriculture – in order to achieve a "just and efficient transition". Indeed, the Green Deal contains a series of legislative and strategic instruments, including: the [European Climate Law](#), [Just Transition Mechanism](#), [Biodiversity](#)

⁴⁶ Article 6 of the Law on Expropriation of FBiH [in Bosnian] ("Official Gazette of FBiH", nos. 70/2007, 36/2010, 25/2012, 8/2015).

⁴⁷ EUR-Lex, Communication from the Commission to the European Parliament, the European Council, the Council, the European Economic and Social Committee and the Committee of the Regions, "The European Green Deal", December 11, 2019, COM(2019), <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex:52019DC0640>, accessed August 27, 2025.

[Strategy for 2030](#), [Circular Economy Action Plan](#), and [Farm to Fork Strategy](#), alongside numerous sectoral regulations relating to energy efficiency, renewable energy sources and industrial transformation.

A special dimension of the European Green Deal is the issue of the secure and sustainable supply of raw materials. The European Commission, in this context, emphasizes the following: “Access to resources is also a strategic security issue for Europe’s ambition to deliver the Green Deal. Ensuring the supply of sustainable raw materials, in particular critical raw materials necessary for clean technologies, digital, space and defense applications, by diversifying supply from both primary and secondary sources, is therefore one of the prerequisites to make this transition happen”.⁴⁸ In other words, access to raw materials – especially critical raw materials such as lithium, cobalt and rare earth elements – is recognized as a prerequisite for achieving the goals of the green and digital transition.

This aspect was further formalized in March 2024 with the adoption of Regulation (EU) 2024/1252 of the European Parliament and of the Council of April 11, 2024 establishing a framework for ensuring a secure and sustainable supply of critical raw materials and amending Regulations (EU) No 168/2013, (EU) 2018/858, (EU) 2018/1724 and (EU) (“Critical Raw Materials Regulation”, “Critical Raw Materials Act” or “CRMA”).⁴⁹ The CRMA defines the critical raw materials value chain from exploration, extraction and processing to recycling and substitution, sets quantitative targets for capacities within the EU and introduces the category of “strategic projects”, including those outside EU territory (from so-called “third countries”), which enjoy accelerated procedures and financial support.⁵⁰

In June 2025, the Jadar project – the planned exploitation of lithium in western Serbia, in the Jadar River valley by the transnational corporation Rio Tinto through its subsidiary company Rio Sava Exploration – was included on the list of strategic projects in so-called “third countries”, in accordance with the CRMA.⁵¹

By its legal nature, the CRMA is a regulation of the European Union that has direct application in the EU member states; thus, it prescribes norms that bind them directly, without requiring prior transposition into their national legal systems. However, this does not apply to countries that are not EU members. Hence, it does not create direct legal obligations for the Republic of Serbia and other “third countries” where strategic projects are being implemented or planned

⁴⁸ Ibid.

⁴⁹ Official Journal of the European Union, Regulation (EU) 2024/1252 of the European Parliament and of the Council of April 11, 2024 establishing a framework for ensuring a secure and sustainable supply of critical raw materials and amending Regulations (EU) No 168/2013, (EU) 2018/858, (EU) 2018/1724 and (EU) 2019/102, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32024R1252&qid=1720020986785>, accessed August 27, 2025.

⁵⁰ Ibid.

⁵¹ Commission Decision of June 4, 2025 recognizing certain critical raw material projects located in third countries and in overseas countries or territories as Strategic Projects under Regulation (EU) 2024/1252 of the European Parliament and of the Council, C(2025) 3491 final, https://single-market-economy.ec.europa.eu/document/download/808502c2-21c7-4ca8-855f-ff0b528f91c4_en?filename=C_2025_3491_1_EN_ACT_part1_v4.pdf, accessed August 26, 2025.

in accordance with the CRMA. This regulation does prescribe certain obligations for the so-called project promoters who have nominated their projects to the Commission, as will be discussed further below.

The CRMA preamble defines “strategic partnership” as the commitment of the Union and a third country (or overseas country/territory) to increase cooperation on the raw materials value chain. This is established through a non-binding instrument that identifies actions of mutual interest. Such partnerships facilitate beneficial outcomes for both the Union and the relevant third country or overseas countries/territories, particularly regarding strategic projects.⁵² Thus, the EU has concluded several such strategic partnerships with the aim of implementing the 2020 Action Plan on critical raw materials, and the plan is to continue this, while periodically examining whether the partnerships are achieving the planned objectives.⁵³

The authors observe two fundamental problems with the CRMA as a legal act. First, the decision-making process for including projects on the strategic projects list is not clearly and precisely defined. Second, the regulation itself contains very general criteria and conditions for such decisions (see below in the analysis).⁵⁴ Consequently, this leaves room for discretionary interpretation by decision-makers, without an obligation to justify the inclusion or exclusion of a particular project from this list. The second major shortcoming lies in the lack of transparency. Non-governmental organizations and experts cannot participate meaningfully in the selection process, as the European Commission is not required to consider or respond to their submissions. There is no obligation to take third parties’ comments or objections into consideration, and the entire relationship is regulated on an inter partes basis, which is inadequate, particularly in the case of managing public goods and the interest that such projects may have for a country and its population.

This Regulation also established the so-called [European Critical Raw Materials Board](#), which has an advisory role vis-à-vis the European Commission and performs certain duties prescribed by the Regulation.⁵⁵ One such duty is to periodically discuss which third countries will be given priority for concluding strategic partnership agreements. The Regulation lists several criteria to be considered, including whether cooperation between the EU and the third country can enhance that country’s ability to ensure supervision, prevention and minimization of negative environmental impacts through its regulatory framework and its implementation, respect for human rights and workers’ rights, particularly with regard to forced and child labor, genuine cooperation with local populations, and proper functioning of public administration and the rule of law.⁵⁶

⁵² Critical Raw Materials Regulation, preamble, para. 65.

⁵³ Ibid., para. 64.

⁵⁴ Ibid., Art. 6.

⁵⁵ Ibid., Art. 35.

⁵⁶ Ibid., Art. 37 (1)(c).

The Regulation emphasizes that strategic projects should be implemented in accordance with the objectives of the European Green Deal, the principles of sustainable development and for the mutual benefit of the European Union and the respective “third” country.

As stated above, the CRMA also defines the criteria for designating a project as strategic. Namely, a project must contribute to EU objectives regarding security of supply, possess technical and financial sustainability, and meet requirements relating to environmental protection, human health and the participation of local communities.⁵⁷ Annex III of the Regulation prescribes that when assessing the fulfillment of criteria, the project’s compliance with both national law and international documents should be taken into account, including the International Labour Organization’s Tripartite Declaration on Multinational Enterprises, and OECD Guidelines for Multinational Enterprises and UN Guiding Principles on Business and Human Rights. The project is designed to contribute to strengthening multiple stages of the value chain in the country or region, stimulating private investment and creating broader economic and social benefits, including employment.

The CRMA also explicitly prescribes that the consent of the state on whose territory the implementation of that project is planned is crucial in the process of awarding strategic project status; that is, in the case of a potential project in a “third country”, upon receiving the application from the project promoter, the Commission must notify that state, and the application must not be approved before the Commission receives that state’s explicit consent.⁵⁸ An interesting provision of the same article requires that project promoters applying for strategic project status in third countries must attach an environmental improvement plan. This plan must aim to restore the extraction site to its previous environmental state, while considering technical and economic feasibility.⁵⁹

In July 2025, the NGO ClientEarth filed a complaint with the European Ombudswoman. It alleged that the Commission violated basic transparency rules in the Regulation when recognizing strategic projects. Specifically, the Commission denied access to reports on the ecological and social aspects of nominated projects, invoking exceptions under Art. 4(2) (protection of commercial interests) and Art. 4(3) (protection of internal consultations) of Regulation 1049/2001. However, ClientEarth argues that the Commission did not conduct the mandatory overriding public interest test, nor did it consider the special circumstances that require the publication of documents relating to environmental protection and human rights. Such conduct, according to the complaint, is contrary to obligations under the Aarhus Convention.⁶⁰ ClientEarth points out that these very documents are of crucial importance for assessing whether projects aspiring to strategic status comply with the criteria from Art. 6 of the CRMA, and thus, according to the complaint, not only has the principle of transparency been under-

⁵⁷ Ibid., Art. 6 (1)(e).

⁵⁸ Ibid., Art. 7 (8).

⁵⁹ Ibid., Art. 7 (1)(h).

⁶⁰ Law on Ratification of the Convention on Access to Information, Public Participation in Decision-Making and Access to Justice in Environmental Matters [in Serbian] (“Official Gazette of RS - International Treaties”, no. 38/2009);

mined, but the legitimacy of the entire procedure for recognizing strategic project status has been compromised.⁶¹

The project promoter is obliged to submit a report to the European Commission every two years after recognition of strategic project status, containing information on:

- progress in project implementation, particularly regarding the permitting process;
- reasons for any delays and a plan for overcoming those delays;
- the state of project financing, including information on public support.⁶²

The Commission may request additional information from the project promoter if necessary to verify whether the project continues to meet the criteria from Article 6.

The project promoter is obliged to inform the Commission of all changes that affect the fulfillment of strategic project criteria, and permanent changes in the control structure over the project. The Commission may adopt implementing acts establishing a uniform reporting template to harmonize the process and facilitate documentation, with the obligation that the required documentation be of reasonable scope.⁶³

Additionally, the project promoter must regularly update the company's website or project website with information relevant to the local population and to strengthen public acceptance of the project. This includes information on the environmental, social and economic impacts and benefits of the project. The website must be available free of charge and in the language or languages that the local population can understand.⁶⁴

The Regulation prescribes that when the Commission concludes that a strategic project no longer meets the prescribed criteria or if the application contained inaccurate information that affects the fulfillment of criteria, it has the right to withdraw the "strategic" status from such a project.⁶⁵ Nevertheless, this possibility remains insufficiently defined, both as to the procedure for withdrawing this status and as to the grounds for doing so.

IV CASE STUDY: JADAR

In 2001, the British-Australian mining corporation Rio Tinto established in Serbia its subsidiary Rio Sava Exploration d.o.o., which was issued a permit for conducting geological explorations

⁶¹ More about the complaint: <https://www.clientearth.org/media/u2ujcdna/complaint-to-the-european-ombudswoman-lack-of-transparency-in-crma-strategic-projects.pdf>.

⁶² Critical Raw Materials Regulation, Art. 8 (1).

⁶³ Ibid., Art. 8 (3).

⁶⁴ Ibid., Art. 8 (5).

⁶⁵ Ibid., Art. 7 (11).

and mining activities. Rio Tinto geologists discovered in 2004 a new mineral containing lithium and boron, named jadarite, after the Jadar River located near Loznica in western Serbia, the area where exploitation of this mineral is planned.⁶⁶

After several years in which the company conducted preparatory and exploration activities, and the project was not yet in the public eye, the Government of the Republic of Serbia launched an intensive campaign, effectively acting as a lobbying force for the implementation of the jadarite exploitation project. Alongside this governmental support,⁶⁷ strong resistance grew among concerned citizens, the scientific community, non-governmental organizations, opposition politicians, and activists.⁶⁸ One of the reasons for concern was the poor global reputation of the Rio Tinto corporation⁶⁹ and the experimental nature of the planned lithium exploitation. Experts warned from the start that there are currently only two mines in the world that use a similar lithium extraction process to the one planned in Jadar, both of which are located in unpopulated (desert) areas, unlike the project in Serbia, which would be implemented in a densely populated agricultural area.⁷⁰ A second concern relates to weak administrative capacity of the Republic of Serbia and the high level of corruption⁷¹ in public administration and society broadly, but also to Serbia's deteriorating rule of law rankings.⁷²

In 2020, the Government of Serbia adopted the Regulation Establishing the Spatial Plan of the Special Purpose Area for the Implementation of the Jadarite Mineral Exploitation and Processing Project "Jadar", which was intended to represent the planning basis for the implementation of this project.⁷³ Shortly after this, the first significant public opposition to the planned project emerged, primarily from the local population in the Jadar valley, due to the lack of information provided about the project.⁷⁴ This period saw a complete absence of communication between the investor company and the local population, as well as non-transparent

⁶⁶ "About the Company" [in Serbian] (Rio Tinto), <https://riotintoserbia.com/o-kompaniji-rio-tinto/>; "Jadar Project" [in Serbian] (Rio Tinto), <https://riotintoserbia.com/projekat-jadar/>, accessed August 30, 2025.

⁶⁷ "Memorandum of Understanding between the Government of Serbia and Rio Tinto on Jadar Project" (Rio Tinto) July 24, 2017, <https://www.riotinto.com/en/news/releases/2017/jadar-mou-serbia-signed>, accessed August 30, 2025.

⁶⁸ "Dissatisfied citizens of Serbia increasingly vocal against Rio Tinto's investment in jadarite mine" [in Serbian] (Balkan Green Energy News), November 6, 2020, <https://balkangreenenergynews.com/rs/nezadovoljni-gradjani-srbije-sve-glasni-ji-protiv-investicije-rio-tinta-u-rudnik-jadarita/>.

⁶⁹ "How Rio Tinto destroyed Aboriginal caves" [in Serbian] (Nova.rs), April 25, 2021, <https://nova.rs/vesti/drustvo/kako-je-rio-tinto-unistio-pecine-aboridzina/>, accessed August 30, 2025.

⁷⁰ "Why a lithium mine project in Serbia worries the European Union", an article by Tatjana Dordevic (Aspenia online), October 21, 2024, <https://aspeniaonline.it/why-a-lithium-mine-project-in-serbia-worries-the-european-union/>.

⁷¹ "Corruption Perceptions Index, Serbia" (Transparency International), <https://www.transparency.org/en/cpi/2024/index/srb>, accessed August 30, 2025.

⁷² "Rule of Law Index, Serbia" (World Justice Project), <https://worldjusticeproject.org/rule-of-law-index/country/2024/Serbia/>, accessed August 30, 2025.

⁷³ "Official Gazette of RS" [in Serbian], no. 26/20.

⁷⁴ "Dissatisfied citizens of Serbia increasingly vocal against Rio Tinto's investment in jadarite mine" [in Serbian] (Balkan Green Energy News), November 6, 2020, <https://balkangreenenergynews.com/rs/nezadovoljni-gradjani-srbije-sve-glasni-ji-protiv-investicije-rio-tinta-u-rudnik-jadarita/>.

conduct by the state and a campaign targeting those who expressed any doubt regarding this project.

In such circumstances, citizens feared possible negative consequences for health and the environment. Rio Tinto's announcement that it planned to open the mine as early as 2022 led to the first mass protest in April 2021, with demands that the state protect the environment and public health; new protests followed in September of the same year.⁷⁵ During this period, again without adequate public consultation, the Government of Serbia proposed amendments to the Law on Expropriation, which would enable easier land expropriation, and amendments to the Law on Referendum and Popular Initiative, which introduced restrictions on holding referendums.⁷⁶ These proposed amendments received support from the President of the Republic,⁷⁷ while citizens perceived them as a way to facilitate the path for the implementation of this concrete project and the opening of a lithium mine⁷⁸ through a simplified procedure. The controversial amendments were eventually withdrawn from the legislative process under public pressure, but protests continued.⁷⁹ In January 2022, Serbian citizens blocked roads in multiple locations for the fifth time – consequently, the Government of Serbia annulled the Regulation on the Spatial Plan for the Jadar project.⁸⁰

Before the annulment of the Spatial Plan, the Ministry of Environmental Protection in July 2021, based on the request for establishing the scope and content of the environmental impact study for the Jadar project, which was submitted by the company Rio Sava Exploration, initiated the environmental impact assessment procedure for the related project. In January 2022, the Administrative Commission of the Government of Serbia annulled the Ministry's initial decision on the submitted request for establishing the scope and content of the study.

⁷⁵ "Thousands of environmental protesters demand that Serbia cancel all obligations to Rio Tinto" [in Serbian] (Balkan Green Energy News), September 11, 2021, <https://balkangreenenergynews.com/rs/hiljade-ekoloskih-ustanika-trazi-lo-da-se-poniste-sve-obaveze-srbije-ka-rio-tintu/>.

⁷⁶ "What is controversial about the laws being protested in Serbia?" [in Serbian] (Radio Free Europe), December 8, 2021, <https://www.slobodnaevropa.org/a/srbija-protesti-zakon/31599642.html>.

⁷⁷ "President of Serbia in favor of amendments to the expropriation law" [in Serbian] (Radio Free Europe), December 4, 2021, <https://www.slobodnaevropa.org/a/vucic-rio-tinto-nedeljice/31593898.html>.

⁷⁸ "Thousands Rally In Serbia Against Expropriation Law, Lithium Mine", Radio Free Europe November 25, 2021, <https://www.rferl.org/a/serbia-mining-lithium-expropriation-/31577972.html>, "Rio Tinto lithium mine: thousands of protesters block roads across Serbia", The Guardian, December 5, 2021, <https://www.theguardian.com/world/2021/dec/05/rio-tinto-lithium-mine-thousands-of-protesters-block-roads-across-serbia>.

⁷⁹ "Serbia Eco Protests to Continue Despite Backdown Over Disputed Laws", Balkan Insight, December 10, 2021, <https://balkaninsight.com/2021/12/10/serbia-eco-protests-to-continue-despite-backdown-over-disputed-laws/>.

⁸⁰ "Serbia scraps plans for Rio Tinto lithium mine after protests", The Guardian, January 21, 2022, <https://www.theguardian.com/world/2022/jan/20/serbia-scraps-plans-for-rio-tinto-lithium-mine-after-protests>;

Regulation on the Termination of Validity of the Regulation on Establishing the Spatial Plan of the Special Purpose Area for the Implementation of the Jadarite Mineral Exploitation and Processing Project "Jadar" [in Serbian], "Official Gazette of RS" no. 8/22.

After that, in accordance with the Law on Referendum and Popular Initiative,⁸¹ in May 2022, a popular initiative for a ban on lithium and boron exploitation, signed by more than 38,000 citizens, reached the National Assembly of the Republic of Serbia. The National Assembly had the obligation to schedule a debate on the proposal that is the subject of the popular initiative within 6 months at the latest.⁸² However, this was never done,⁸³ with the explanation that all (certified) signatures, together with the initiative, were lost after submission. This explanation is illogical and unconvincing. More importantly, no one was held accountable – politically or criminally – for this gross violation of the law and fundamental democratic principles.

Even after the Government annulled the Spatial Plan at the beginning of 2022, the Rio Tinto company repeatedly requested deadline extensions for submitting missing documentation to obtain an exploitation permit, which the Ministry of Mining and Energy informally granted on multiple occasions, contrary to Serbian regulations.⁸⁴ In accordance with the law, an incomplete application of this type must be rejected; however, instead of this, the Ministry continued to extend the deadline indefinitely, on multiple occasions and based on oral communication with the investor.

In 2024, the Rio Tinto project was fully revived, and the turning point was the controversial decision of the Constitutional Court of July 11, 2024, which ruled that the previous annulment of the Spatial Plan by the Government of RS was contrary to the Constitution of Serbia.⁸⁵ Following that decision, the Government reinstated the Spatial Plan,⁸⁶ by adopting the Regulation on the Application of the Regulation on Establishing the Spatial Plan of the Special Purpose Area for the Implementation of the Jadarite Mineral Exploitation and Processing Project “Jadar”.⁸⁷ This effectively returned the project to its status prior to the Government’s 2022 decision.

The Constitutional Court’s decision was highly controversial, as both its legal basis and technical reasoning faced well-founded criticism. The reasoning itself suffers from inconsistency, informal style, and the judges’ failure to distinguish between two completely different regulations – the Law on Environmental Impact Assessment and the Law on Strategic Environmental Impact Assessment. In addition, the decision was not adopted unanimously: two judges is-

⁸¹ Official Gazette of RS [in Serbian], nos. 111/21 and 119/21, Art. 56.

⁸² Law on Referendum and Popular Initiative [in Serbian], (“Official Gazette of RS”, nos. 111/21 and 119/21), Art. 69.

⁸³ “Where did 38,000 signatures for banning lithium mining disappear: Don’t Let Belgrade D(r)own demands special Assembly session” [in Serbian] (Nova.rs), March 5, 2023, <https://nova.rs/vesti/politika/gde-je-nestalo-38-000-potpisa-za-zabranu-iskopavanja-litijuma-ne-davimo-beograd-trazi-posebnu-sednicu-skupstine/>.

⁸⁴ “Ministry of Mining and Energy improperly extends Rio Tinto’s deadline for obtaining lithium exploitation permit” [in Serbian] (RERI), April 11, 2023, <https://reri.org.rs/ministarstvo-rudarstva-i-energetike-neopravdano-produzava-rok-kompaniji-rio-tinto-za-dobijanje-dozvole-za-eksploataciju-litijuma/>.

⁸⁵ Constitutional Court Decision [in Serbian]: <https://drive.google.com/file/d/1FOZ8uyeBEbDKk7uqVqZZ6ADCPXAW3ANh/view?usp=sharing>.

⁸⁶ “Government of Serbia ‘brought back to life’ the Jadar project, welcomed by Rio Tinto, condemned by environmental activists” [in Serbian] (Radio Free Europe), July 16, 2024, <https://www.slobodnaevropa.org/a/rio-tinto-litijum-vlada-srbije/33038609.html>;

⁸⁷ Official Gazette of RS [in Serbian], no. 60/24.

sued separate opinions regarding this decision. These opinions, however, are also inadequately reasoned and appear – in the authors' view – to serve more as personal justifications for the judges' votes rather than substantive legal analysis, thus offering no additional legal value.

Immediately before this, numerous pro-government media began an intensive campaign in favor of lithium mining, presenting the project's return as a foregone conclusion, thereby effectively foreshadowing the outcome of the Constitutional Court's decision and further intensifying pressure on that institution. In that process, the President of Serbia⁸⁸ once again played the most prominent role, publicly announcing that he would personally insist on strong guarantees regarding ecological and health standards – although, according to the Constitution and existing legislation, he has no formal authority regarding the implementation of this project.

Shortly after the Constitutional Court's decision, a summit was held in Belgrade at which Serbia and the European Union signed a Memorandum of Understanding (MoU) on strategic partnership in the field of strategic raw materials, and supply chains in the field of batteries and electric vehicles. The MoU was signed in the presence of Serbian President Aleksandar Vučić and then-German Chancellor Olaf Scholz.⁸⁹

Particularly surprising – and alarming – is the fact that previously, in September 2023, during the period when the project was officially suspended by the Government of Serbia, the European Commission and the Government of Serbia signed a Letter of Intent to deepen cooperation in the field of critical raw materials and electric vehicles. Serbian citizens became aware of this only through the above-described MoU, and it is particularly concerning that something like this was done in anticipation of the Constitutional Court's decision. This should be viewed as yet another form of political pressure on the Constitutional Court aimed at legally reviving this project in Serbia, which ultimately happened.

From the end of July to the beginning of August 2024, protests against lithium mining were organized throughout Serbia, encompassing a total of 48 cities and municipalities.⁹⁰ The most massive gathering was held on August 10 in Belgrade, when tens of thousands of people took to the streets demanding a complete ban on lithium and boron exploration and exploitation, and pointing to serious risks to citizens' health and the environment. Just a few hours after

⁸⁸ “Vučić: Lithium will not be mined for at least another four years, I demand guarantees for the people of Rađevina” [in Serbian], July 4, 2024, <https://n1info.rs/vesti/vucic-litijum-se-nece-iskopavati-bar-jos-cetiri-godine-trazim-garancije-za-ljudu-u-radjevini/>.

⁸⁹ “Serbia and EU signed memorandum supporting the opening of Rio Tinto's lithium mine” [in Serbian], Balkan Green Energy News, July 19, 2024, <https://balkangreenenergynews.com/rs/srbija-i-eu-potpisale-memorandum-koji-podrzava-otvaranje-rudnika-litijuma-rio-tinta/>.

⁹⁰ “Protests against lithium mining throughout Serbia” [in Serbian], Balkan Green Energy News, July 29, 2024, <https://balkangreenenergynews.com/rs/sirom-srbije-protesti-protiv-iskopavanja-litijuma/>; “Rio Tinto, get out of Serbia”: Protests against lithium mining held in Pančevo, Topola”, N1, August 2, 2024, <https://n1info.rs/english/news/rio-tinto-get-out-of-serbia-protests-against-lithium-mining-held-in-pancevo-topola/>; “Protests Flare Up In Serbian Towns Over Reversal On Huge Lithium Mine”, RadioFreeEurope, August 2, 2024, <https://www.rferl.org/a/serbia-rio-tinto-lithium-mine-protests/33059581.html>.

that rally, arrests took place: a total of 14 people were suspected of committing criminal offenses, three on misdemeanor charges, while two foreign citizens were detained for being in proximity to state institutions.⁹¹ Particular attention was drawn to the fact that three activists were imprisoned for allegedly committing a misdemeanor, which can be assessed as a precedent in Serbian judicial practice. One of the arrested citizens was sentenced to 40 days in prison, and two to 30 days each, based on the Law on Public Peace and Order, with charges of “crude, brazen and reckless behavior” in a group.⁹² According to their statements, only two of these individuals were present at the scene during the alleged incident, while the third was not even there, although he was included in the verdict. Such qualification was obviously intended to treat the arrested persons as a “group,” because for this misdemeanor, the law provides for monetary fines or community service as penalties for individuals, while in the case that the same offense was committed in a group (at least three persons), a prison sentence of 30 to 60 days can also be imposed. Parallel to the court proceedings, pro-government tabloids launched a campaign labeling activists as “hooligans” and “thugs”⁹³ and President Vučić himself further stigmatized them by calling them Marxists and anarchists who behave like imbeciles.⁹⁴ All circumstances indicate strong political pressure behind such decisions, which was confirmed by the fact that the Court of Appeals annulled the verdict just three days later and ordered the release of the activists, thereby clearly showing that the initial decision of the Misdemeanor Court was unlawful.

In September 2024, the Rio Tinto company submitted to the Ministry of Environmental Protection a new request for establishing the scope and content of the environmental impact assessment study for the Jadar project. The Ministry responded on November 15, 2024, by adopting a decision establishing the scope and content of the study. Renewables and Environmental Regulatory Institute (RERI) then filed a lawsuit seeking to annul the decision as unlawful.⁹⁵ The procedure is currently under review by the Administrative Court, after the Government of Serbia upheld the first-instance decision. Problematically, the lawsuit does not suspend execution of the decision, meaning the investor may continue project implementation even while the Administrative Court reviews its legality. Considering that the Administrative Court typically takes 3-5 years to decide such cases, it is clear that the project could, theoretically, be fully implemented before the Administrative Court rules that the decision was unlawful.

⁹¹ “Detention for three activists after protest in Belgrade” [in Serbian] (Radio Free Europe), August 11, 2024, <https://www.slobodnaevropa.org/a/privedeni-aktivisti-beograd-protest-litijum/33074431.html>.

⁹² Official Gazette of RS [in Serbian], nos. 6/2016 and 24/2018, Art. 8.

⁹³ “Đilas’s and Šolak’s hooligans attacked Informer’s news crew! They assaulted a journalist and cameraman, angry mob surrounded them and poured beer on them (VIDEO)” [in Serbian], Informer, August 11, 2024, <https://informer.rs/politika/vesti/933607/dilasovi-i-solakovi-huligani-napali-ekipu-informera-nasrnuli-na-novinarku-i-kamermana-besna-rulja-ih-opkolila-i-polivala-pivom-video>.

⁹⁴ “Vučić on the attack on Informer’s journalist: An angry mob surrounded her, pushed a sandwich in her mouth and poured beer on her (VIDEO)” [in Serbian], Informer, August 11, 2024, <https://informer.rs/politika/vesti/933702/vucic-o-napadu-na-novinarku-informera>.

⁹⁵ <https://reri.org.rs/rudnik-ni-na-nebu-ni-na-zemlji/> [in Serbian];

The previous decision on the scope and content of the study for the same project, which the Ministry adopted on August 18, 2021, was annulled by the decision of the Government of Serbia on January 25, 2022. Despite this, the company again submitted a request for establishing the scope and content in September 2024. The Ministry's latest decision of November 15, 2024, does not represent a final or binding act. In addition, the CRMA explicitly stipulates that such decisions must be made within a period not exceeding 45 days from the submission of the request, which in this case was not observed, indicating limited administrative capacities of the relevant authorities in Serbia to implement obligations under the CRMA.

The requests from 2021 and 2024 both rely on the existing Law on Environmental Impact Assessment, which is not aligned with the requirements of Directive 2011/92/EU. In the authors' opinion, Rio Tinto employed a strategy commonly known as salami slicing through both procedures. This strategy has been used by many previous investors in the Republic of Serbia. It involves dividing one integral project into several smaller segments to avoid comprehensive assessment of the overall environmental and health impacts. Ultimately, each fragmented "part" of the project appears less invasive than the collective impact of the integral project.

Both requests addressed exclusively underground exploitation and did not include the ore processing facility, mining waste disposal, water treatment systems, or the infrastructure necessary for the implementation of this project. As already mentioned, such "project division" in practice is not an isolated case, but rather a widespread practice in the Republic of Serbia, largely enabled by the authorities. Such behavior is characteristic of companies from outside the European continent,⁹⁶ as well as those from EU member states.⁹⁷ Unfortunately, the Government of Serbia and other relevant institutions do not sanction such unlawful conduct; rather, they appear to actively support investors and facilitate illegal activities, especially in "projects of strategic interest" for the Republic of Serbia.

Given that similar projects in Serbia have so far been marked by numerous illegalities and irregularities, there is justified concern that the Jadar project would have a similar negative impact on the environment and human rights. Experience to date provides little confidence. The operations of Zijin Mining and Zijin Copper in Bor serve as blatant examples of environmental pollution, violations of existing laws and fundamental human rights by a mining company in Serbia.⁹⁸

⁹⁶ O tempora, o mores! Case study of tire factory construction in Zrenjanin #2 [in Serbian], <https://reri.org.rs/publikacija/o-tempora-o-mores-studija-slucaja-izgradnje-fabrike-guma-u-zrenjaninu-2/>.

⁹⁷ This practice of project fragmentation in Serbia is explained in detail in the RERI publication "Application of the Law on Environmental Impact Assessment in the Republic of Serbia – twenty lost years" [in Serbian], p. 28, <https://reri.org.rs/wp-content/uploads/2024/07/Primena-Zakona-o-proceni-uticaja-na-zivotnu-sredinu-u-R-Srbiji.pdf>.

⁹⁸ "RERI: Zijin Zagrađe has operated unimpeded for more than three years without necessary permits" [in Serbian] (N1), April 30, 2025, <https://n1info.rs/vesti/reri-zidjin-zagradje-neometano-radi-vise-od-tri-godine-bez-potrebni-dozvola/>; "Criminal complaint against Zijin for environmental pollution" [in Serbian] (N1) July 10, 2025, <https://n1info.rs/zeleni-kutak/krivica-na-prijava-protiv-zidjina-zbog-zagadjjenja-zivotne-sredine/>; "Zijin sentenced to two million dinars for illegal construction in Bor" [in Serbian] (RERI) September 6, 2024, <https://reri.org.rs/zijin-osudjen-na-dva-miliona-dinara-zbog-nelegalne-izgradnje-u-boru/>.

For any mining project to be considered in Serbia going forward, fundamental requirements must first be met: respect for stakeholder inclusion and participation and, above all, full compliance with environmental protection and human health regulations. Additionally, Serbia must improve public administration, establish an independent judiciary, implement transparent and high-quality environmental impact assessment procedures, create efficient control (inspection) mechanisms, and ensure access to timely and objective information.⁹⁹ Without respect for these basic principles, the implementation of such projects carries a high level of risk.

V THE IMPACT OF MINING ON THE ENVIRONMENT, HEALTH AND SOCIETY IN SERBIA

Serbia faces the challenge of aligning its mineral and geological resource management policy with environmental protection requirements, the values and objectives of the European Green Deal, the Green Agenda for the Western Balkans, and international instruments for responsible business conduct in mining. Mining activities can lead to land degradation, water pollution, endangerment of health, and human rights. The expansion of mining in the last decade in Serbia coincides with a worrying erosion of democracy and the rule of law, evident decline in the capacity of public institutions that cannot ensure the application of environmental protection standards, prevention, elimination or reduction of negative environmental impacts, supervision of regulatory implementation, and sanctioning in cases of law violations.

In the mining sector and in Serbia's planning system generally, there is an obvious systemic lack of both a strategic framework and basic social agreement on development directions. This results in negative impacts of mining on the environment and society. Before any social dialogue was initiated about increasing mineral resource exploitation as a development opportunity or as a risky venture, extractivism became the dominant development paradigm in Serbia. The commitment to extensive exploitation of natural and mineral resources for the sake of short-term economic growth and private company profits, while neglecting impacts on the environment and society, is being pursued haphazardly, without appropriate impact assessments, public participation, and long-term development vision.

The Draft Strategy for Managing Mineral and Other Geological Resources of the Republic of Serbia for the period from 2025 to 2040, with projections to 2050, proposes an accelerated development scenario. The accelerated mining development scenario is characterized by coal production of 40,000,000 tonnes with partial imports, increased exploitation and production

⁹⁹ "Lithium mining in Serbia: An open and productive debate is not possible", Heinrich-Böll-Stiftung, July 19, 2024, <https://eu.boell.org/en/2024/07/19/lithium-mining-serbia-open-and-productive-debate-not-possible>.

of copper, gold, silver, the opening of a lithium mine with annual production of 58,000 tonnes and the initiation of cobalt and nickel production at 20,000 tonnes annually.¹⁰⁰

The Republic of Serbia does not have a state development plan which, as the highest-level and long-term development planning document, should have been adopted five years ago.¹⁰¹ However, the Government only adopted the Regulation on the Procedure for Preparing the Draft Development Plan of the Republic of Serbia in June 2023, and in April 2025, by amending the Regulation, established a deadline for forming an expert group.¹⁰² The preparation of the Development Plan of the Republic of Serbia should have ensured the broadest social dialogue and agreement on the development priorities of the entire society, including long-term goals and plans for managing natural and mineral resources. But this did not happen at all.

The Republic of Serbia has also not established the goal of mining and geological exploration development and strategic directions of action in this area through the Strategy for Managing Mineral and Other Geological Resources of the Republic of Serbia.¹⁰³ This strategy was only recently made available for public review, and the public consultation on this strategic document was accompanied by unprecedented measures to prevent the public from participating in the public presentation, with police assistance.¹⁰⁴

The planning framework is further undermined by the fact that the Spatial Plan of the Republic of Serbia has still not been adopted, given that the previous one was valid for the period up to 2020.¹⁰⁵ The new spatial plan has still not been adopted, although the draft was presented to the public back in 2021. However, despite the incomplete national spatial planning framework, land use and resource management planning in Serbia is happening haphazardly and

¹⁰⁰ Draft Strategy for Managing Mineral and Other Geological Resources of the Republic of Serbia for the period from 2025 to 2040, with projections to 2050 [in Serbian], p. 58.

¹⁰¹ Article 53 of the Law on the Planning System [in Serbian] ("Official Gazette of RS", no. 30/18) establishes the Government's obligation to submit to the National Assembly a proposal for the Development Plan no later than January 1, 2020, that is, slightly less than two years from the adoption of this law.

¹⁰² Regulation on the Procedure for Preparing the Draft Development Plan of the Republic of Serbia [in Serbian] ("Official Gazette of RS", nos. 54/23 and 33/25).

¹⁰³ The Proposal for the Strategy for Managing Mineral Resources of the Republic of Serbia until 2030 was sent to the National Assembly for consideration in March 2012: http://www.parlament.gov.rs/Pedeset_tre%C4%87a_sednica_Odbora_za_industriju_15090.941.html. Although the Law on Mining and Geological Explorations [in Serbian] ("Official Gazette of RS" no. 101/15) provided for the development of a strategy, ten years after the adoption of this law the strategy has not been adopted.

¹⁰⁴ Public consultations and public discussion on the Draft Strategy for Managing Mineral and Other Geological Resources of the Republic of Serbia were initiated in June 2025 [in Serbian]: <https://www.mre.gov.rs/tekst/10821/-javne-konsultacije-i-javna-rasprava-nacrt-strategije-upravljanja-mineralnim-i-drugim-geoloskim-resursima-republike-srbije-php>.

After several postponements, the public presentation of the Draft Strategy for Managing Mineral and Other Geological Resources was held at the premises of the Serbian Chamber of Commerce on August 7, 2025. On that occasion, despite the fact that the hall was mostly empty, police and private security did not allow citizens, activists, experts and members of parliament to enter the public presentation [in Serbian]: <https://n1info.rs/vesti/na-ulazu-u-pks-privatno-obebedjenje-na-drugom-interventna-pesnice-i-guranje-ulicna-rasprava-umesto-javne/>.

¹⁰⁵ Law on the Spatial Plan of the Republic of Serbia from 2010 to 2020 [in Serbian] ("Official Gazette of RS", no. 88/10).

in a piecemeal manner – most often using special purpose area plans as an instrument for planning in accordance with particular and immediate interests. Developers of such plans selectively cite either the 2010 Spatial Plan or the 2021 Draft Spatial Plan – depending on which serves their argument.

With approximately 130 km² of land covered by mining activities, Serbia ranks among the ten European countries with the largest absolute mining area in relation to the total area of the state.¹⁰⁶ Serbia annually generates approximately 170 million tonnes of mining waste, of which 76.9% is non-hazardous and 23.1% is hazardous waste.¹⁰⁷ Mining waste undoubtedly represents the largest source of waste generation in Serbia. The total amount of waste, excluding mining waste, in the Republic of Serbia in 2023 was 10,888,212 tonnes.¹⁰⁸ The State Audit Institution points out that the mining waste management system in the Republic of Serbia is not effective.¹⁰⁹ In 2024, as much as 22% of wastewater in industry was generated in the mining sector, of which only 12% was treated, which is less than the 16% that was treated during 2023, and certainly less than the 50.7% that was treated in 2011.¹¹⁰

The weaknesses of institutions that cannot ensure the application of regulations and environmental protection standards in mining are also evidenced by the alarming fact that in Serbia not a single operator has a permit for the collection, transport, treatment and disposal of mining waste.¹¹¹ The alarming situation is not alleviated by the State Audit Institution's finding from 2022 that only one operator disposes of and manages mining waste based on a mining waste permit and mining waste management plan.¹¹² The State Audit Institution also concluded that an effective system for submitting and controlling the accuracy of data on the quantities produced and character of mining waste has not been established, and that there is no electronic or other database on total quantities of mining waste and mineral raw materials.¹¹³

It is precisely the deficiency highlighted by the State Audit Institution that should have been resolved much earlier by the project “Cadaster of Mining Waste of the Republic of Serbia” fi-

¹⁰⁶ Maus, Victor; da Silva, Dieison M; Gutschlhofer, Jakob; da Rosa, Robson; Giljum, Stefan; Gass, Sidnei L B; Luckeneder, Sebastian; Lieber, Mirko; McCallum, Ian (2022): Global-scale mining polygons (Version 2) [dataset]. PANGAEA, <https://doi.org/10.1594/PANGAEA.942325>.

¹⁰⁷ Statistical Office of the Republic of Serbia, [Generated and Treated Waste](#), 2023 [in Serbian]. Data for 2023 are presented to be comparable with data from the Environmental Protection Agency for that same year (author's note).

¹⁰⁸ Ministry of Environmental Protection, Environmental Protection Agency, [Waste Management in the Republic of Serbia in the period 2011-2023](#) [in Serbian], Belgrade, September 2024, p. 6.

¹⁰⁹ State Audit Institution, Report on Performance Audit: Hazardous Waste Management [in Serbian], Belgrade, December 2022, p. 2.

¹¹⁰ Jovan Cvjetinović, Ljubica Vukčević, Hristina Vojvodić and Marija Martić, [\(In\)visible Pollution: Industrial Wastewater Management in Serbia](#) [in Serbian], Regulatory Institute for Renewable Energy and Environment, May 2025.

¹¹¹ Waste Management Program in the Republic of Serbia for the period 2022-2031 [in Serbian] (“Official Gazette of RS”, no. 12/22).

¹¹² State Audit Institution, Report on Performance Audit: Hazardous Waste Management [in Serbian], Belgrade, December 2022, p. 3.

¹¹³ Ibid., p. 6.

nanced by the EU.¹¹⁴ As one of the environmental protection measures in the Draft Spatial Plan of the Republic of Serbia, the development of a cadaster of abandoned mines and mining facilities is envisaged, as well as the remediation and reclamation of abandoned mining facilities.¹¹⁵

As early as 2018, data were collected on 250 abandoned mining waste sites (landfills) in the Republic of Serbia, of which 41 sites were selected for detailed research and analysis due to their potential impact on the environment, safety and human health.¹¹⁶ In official documents of the Republic of Serbia, data on the results of this project can be found indicating the existence of over 200 active mines with mining waste deposits, 250 abandoned and inactive mining waste sites, of which 41 sites were characterized as high risk for the environment and human health.¹¹⁷ The project was supposed to offer the public detailed and up-to-date data on mining landfills in Serbia and provide a basis for environmental analysis and planning regarding mining waste resolution. However, the database is no longer available on the Ministry of Mining and Energy's website, except for limited data on 41 abandoned mining waste landfills.¹¹⁸

Environmental protection is ensured, above all, through preventive action, in accordance with the principle that prevention is better than cure. The principle of prevention and precaution requires that every activity must be planned and implemented in a manner that:

- causes the least possible change in the environment;
- represents the least risk to the environment and human health;
- reduces spatial burden and consumption of raw materials and energy in construction, production, distribution and use;
- includes the possibility of recycling; prevents or limits environmental impact at the source of pollution itself.

The principle of precaution is implemented through environmental impact assessment and the use of best available and accessible technologies, techniques and equipment.¹¹⁹

It is precisely for this reason that, in the process of European integration, preventive environmental protection instruments were introduced into the legal framework of the environmental protection system in Serbia as early as 2004: environmental impact assessment, strategic

¹¹⁴ EU in Serbia: [Mining Waste Cadastre in Serbia with support from the EU Delegation](#) [in Serbian], September 3, 2018.

¹¹⁵ Draft Spatial Plan of the Republic of Serbia from 2021 to 2035 [in Serbian], p. 201.

¹¹⁶ EU in Serbia, [Mining Waste Cadastre in Serbia with support from the EU Delegation](#) [in Serbian], September 3, 2018.

¹¹⁷ Ministry of Agriculture, Forestry and Water Management, Republic Water Directorate, Water Management Plan on the Territory of the Republic of Serbia [in Serbian].

¹¹⁸ BIRN, [Mines and landfills in Serbia: Mining waste cadastre - forgotten state project paid two million euros](#) [in Serbian], Miodrag Marković, October 22, 2024; Ministry of Mining and Energy, Mining Waste Cadastre [in Serbian]: <https://kro.mre.gov.rs/jkro/>.

¹¹⁹ Law on Environmental Protection [in Serbian] ("Official Gazette of RS" nos. 135/04, 36/09, 36/09, 72/09, 43/11, 14/16, 76/18, 95/18, 95/18 and 94/24).

environmental assessment, and integrated pollution prevention and control. However, not even 20 years after the adoption of regulations, Serbia has not established a functional system of preventive environmental protection, which has undoubtedly contributed to ineffective environmental protection in the field of mining.

MEMORANDUM OF UNDERSTANDING IN THE FIELD OF CRITICAL RAW MATERIALS BETWEEN THE EUROPEAN UNION AND SERBIA

Given Serbia's weaknesses regarding prevention and environmental protection in the field of mining, one might expect the EU-Serbia critical raw material strategic partnership to be founded on critical analysis and firm guarantees. Specifically, improved environmental protection and human rights standards should be indispensable preconditions for considering critical raw materials exploitation. The Memorandum of Understanding, signed between the EU and Serbia in July 2024, was announced as setting preconditions for a partnership that "aims to support the development of new local industries and high-quality jobs along the electric vehicle value chain in full respect of high environmental and social standards while addressing the concerns of local communities with full transparency".¹²⁰ However, the document appears to neglect the real situation in Serbia regarding mining's environmental impact. The Memorandum emphasizes that signatory parties agree to ensure full respect for human rights and high environmental protection standards through cooperation.¹²¹ However, the assessment of Serbia's legal and strategic framework development is extremely optimistic compared to the current situation and the European Commission's assessments in its annual reports. Namely, the Memorandum states that "in recent years there have been a number of significant events that were taken into account when establishing this partnership," where a series of laws and regulations adopted in Serbia are listed, but the considerable delay in harmonizing regulations in Serbia with the EU acquis in the field of environmental protection is completely neglected. The importance of the Law on Environmental Impact Assessment and the Law on Strategic Environmental Assessment is also highlighted, although these regulations had not been adopted at all at the time of signing the Memorandum. The European Commission in its reports firmly adhered to the methodological rule that progress in transposition of the EU acquis is recorded only in relation to adopted laws, but not in relation to drafts or proposals.

Otherwise, in the report for 2023, the European Commission assessed the current situation in Serbia in Chapter 27 (environment and climate change) as having "some level of preparation," which is only one step above "early stage" as the weakest level of preparedness. Regarding progress in the reporting period, Serbia was assessed as having made "some progress." Such

¹²⁰ European Commission, EU and Serbia sign strategic partnership on sustainable raw materials, battery value chains and electric vehicles: https://ec.europa.eu/commission/presscorner/detail/en/ip_24_3922, July 19, 2024.

¹²¹ Memorandum of Understanding Between the European Union and the Republic of Serbia on a Strategic Partnership on Sustainable Raw Materials, Battery Value Chains and Electric Vehicles: https://single-market-economy.ec.europa.eu/document/6fe0e605-9299-45c3-b846-2efb85585251_en.

an assessment by the European Commission in the report does not align with the optimistic assessments contained in the Memorandum.

The Memorandum establishes a partnership that should be “open, transparent and inclusive, and provide for a strong public-private multi-level partnership engaging representatives of EU institutions and bodies, industrial actors, business associations, social partners, representatives of civil society from both sides, as well as relevant ministries of interested Member States and Serbia.” This document particularly emphasizes respect for the principle of transparency. However, such an approach has not been confirmed in practice. Namely, the Memorandum envisages the development of a strategic roadmap within 6 months from the date of its signing. There is no indication that such a document has been drafted or published, or that the signatory parties adhered to the principles of transparency and inclusiveness during the preparation of the strategic roadmap. Also, the public in Serbia is not familiar with the outcome of the annual ministerial-level meetings envisaged by the Memorandum, or whether these meetings were held at all. Supervision of the implementation of the Memorandum should be carried out by a working group composed of senior officials, yet here too, the public in Serbia has not been informed whether this working group has met and what the outcomes of those meetings were.

Although the Memorandum of Understanding is not a document that creates rights and obligations between the signatory parties, it envisages some concrete steps that should ensure monitoring of its implementation, defining strategic directions of cooperation, and respect for the principles of inclusiveness and transparency. The public reaction in Serbia to the signing of the Memorandum – more precisely, the months-long protests that followed – at the very least demanded full openness from both signatory parties, regular public information, and strict monitoring of Serbia’s progress in improving environmental protection standards. However, the provisions of the Memorandum relating to transparency and stakeholder participation have so far remained only on paper.

VI DEFICIENCIES IN POLLUTION PREVENTION MECHANISMS THROUGH ENVIRONMENTAL IMPACT ASSESSMENT USING: THE CASE OF THE JADAR PROJECT

The weaknesses of the preventive environmental protection system through environmental impact assessment became evident during the procedures for establishing the scope and content of the environmental impact assessment study for the underground exploitation project of lithium and boron deposits by the company “Rio Sava Exploration”.¹²² In this procedure, methods were applied that investors use to present environmental impacts as smaller than they actually are, including project fragmentation (so-called salami slicing) and neglecting the conditions and approvals of other relevant authorities in the environmental impact assessment procedure. This case points to broader, systemic deficiencies in the application of the Law on Environmental Impact Assessment in Serbia, and to an institutional framework that enables, and even encourages, practices that lead to minimizing the real impacts of projects on the environment and making decisions without adequate protection measures.¹²³

Rio Tinto company resorted to dividing a single project into several smaller units, which is immediately noticeable because the company submitted a request for establishing the scope and content of the environmental impact assessment study exclusively for underground exploitation of lithium and boron deposits.¹²⁴ Such an approach ignores the fact that the planned project in the Jadar valley encompasses underground exploitation, ore processing, mining waste disposal at a landfill, water extraction from the Drina River alluvium, and construction of infrastructure for the project’s implementation.

Consequently, the request itself does not show the impact of ore processing on the environment. It is not known which types of reagents will be used, which types of waste and waste-

¹²² The company submitted the request on September 17, 2024. (The request that this company submitted in 2021 will not be analyzed here). More information about the submitted request is available at RERI: Rio Tinto - Salami slicing according to “the highest European environmental protection standards” [in Serbian]: <https://reri.org.rs/rio-tinto-salami-slicing-po-na-ivisim-evropskim-standardima-zastite-zivotne-sredine/>, October 7, 2024.

¹²³ For more details on problems in applying the Law on Environmental Impact Assessment, see: Application of the Law on Environmental Impact Assessment in the Republic of Serbia - twenty lost years [in Serbian], Regulatory Institute for Renewable Energy and Environment, Belgrade 2024.

The Law on Environmental Impact Assessment was adopted in 2004, and amendments to this law were adopted in May 2009. The new Law on Environmental Impact Assessment, which is currently in force, was adopted in November 2024 and entered into force on December 6, 2024. Neither the law from November 2024, nor its predecessors, are fully aligned with the current EU Directive on Environmental Impact Assessment.

¹²⁴ RERI: Rio Tinto - Salami slicing according to “the highest European environmental protection standards” [in Serbian].

water will be generated, nor how they will be treated. It is also not known how the mine will be supplied with water, and there was no presentation of the disposal of sludge from the production of lithium carbonate, boric acid and sodium sulfate, which can have significant negative environmental impacts. The Ministry of Environmental Protection issued a decision establishing the scope and content of the impact assessment study based on Rio Tinto's request and took the position that the mine (underground exploitation) can function as an independent unit, that is, that there is no causal relationship between the mine and the ore processing facility.¹²⁵ Such a conclusion by the Ministry is an obvious example of a state body's effort to protect the interests of a private company at any cost, contradicting both the provisions of the law and elementary logic. Namely, in theory it is possible for an underground mine to be an independent functional unit in relation to an ore processing facility, and such cases exist in practice. Consider a scenario in which a mining company builds a mine and begins exploitation but does not process the ore at all, but instead hands over the raw ore to another company that processes that ore at another location, perhaps even in another country. Such a situation is possible – except that is not the case with the Jadar project. Namely, it is a single project that includes the exploitation and processing of the jadarite mineral. When making the decision, the Ministry of Environmental Protection was not entitled to consider a hypothetical situation, but was obliged to decide on the basis of the project's specifics and location, the opinions of interested bodies and organizations, and the interested public. There was no room for any kind of abstraction such as the one the Ministry of Environmental Protection resorted to.¹²⁶ This conclusion is also confirmed by the conditions of the Institute for Nature Conservation, which explicitly state that this project requires an impact assessment study of the main mining project that will cover all phases of exploitation and processing of jadarite ore.¹²⁷

The procedure for deciding on Rio Tinto's request to establish the scope and content of the environmental impact assessment study also revealed the weaknesses of state bodies. RERI pointed out in its appeal against the Decision of the Ministry of Environmental Protection that the request for establishing the scope and content of the impact assessment study was not prepared in accordance with the water conditions set and issued by the Republic Water Directorate. In the decision establishing the scope and content of the study, the Ministry of Environmental Protection took the position that the project promoter fulfilled the legal obligation merely by attaching the water conditions, considering that there was no obligation to harmonize the request with the content of the issued conditions. In doing so, the Ministry reduced the conditions of public authorities to a mere formality, thereby essentially deviating from the purpose and rationale. The purpose of these conditions is to ensure that the project content is harmonized with them and integrated into the project itself. The Ministry's position was also confirmed by the Government of Serbia as the second-instance body in this procedure. The

¹²⁵ Ministry of Environmental Protection, Decision no. 002541265 2024 of November 15, 2024 [in Serbian].

¹²⁶ This conclusion is also confirmed by the opinion of retired university professor Vera Dondur, who stated in the TV program "Lithium: experts speak," produced by N1 [in Serbian]: "Instead of preparing an environmental impact study of jadarite exploitation and processing, (the company) presented this in fragments, in three completely separate materials that were done by different teams that obviously did not communicate much with each other".

¹²⁷ Decision of the Institute for Nature Conservation 03 no. 021-2818/7 of August 21, 2024 [in Serbian].

Government concluded that “the project promoter has attached conditions and approvals from other relevant bodies and organizations obtained in accordance with the special law to the request for establishing the scope and content of the impact assessment study, whereby that law (the Law on Impact Assessment) does not oblige the promoter to align said request with water-related and other conditions.”¹²⁸ Thus, both the Government and the Ministry of Environmental Protection take the position that the project promoter was not obliged to answer essential questions in the request for establishing the scope and content – the basis on which the relevant ministry establishes the content of the impact assessment study itself. The essential questions relate to: preventive protection of water sources of strategic importance for the Republic of Serbia in the Drina valley and the right bank of the Sava; risk management in case of emergency pollution or consequences of earthquakes; traffic accidents during transport of hazardous chemicals; and defense against catastrophic floods.

VII SOCIAL IMPACTS OF MINING PROJECTS – THE CASE OF THE ‘JADAR’ PROJECT

The project for exploiting lithium and boron in the Jadar River valley in Western Serbia has not been approved by the relevant authorities of the Republic of Serbia, nor have mining works begun. However, this project, currently in the environmental impact assessment decision-making phase, is a unique example of a project that has undoubtedly already had far-reaching impacts, considerably shaping the socio-political reality in Serbia.

This project has been promoted by officials as transformative for Serbian society, a project that will enable accelerated economic growth, create development opportunities and improve the country’s international position. High-ranking officials announced that, with the growth of gross domestic product that lithium exploitation would allegedly bring, Serbia would become a “different country”.¹²⁹ And while some experts dismiss these expectations, considering the overall benefits for the economy to be marginal,¹³⁰ this raises the question not only of the ecological costs, but also the social costs of implementing this project. In a context where the decision to pursue a particular project was made outside strategic frameworks, non-transparently and without the possibility of review, the consequences of such a decision encompass all levels of decision-making, reshaping decision-making processes, mechanisms for public participation and social organization.

To consider the social impacts of this mining project so far, it is crucial to take into account undemocratic patterns at different levels of governance in Serbia, and the absence of long-

¹²⁸ Decision of the Government of the Republic of Serbia, Administrative Commission, 14 no. 353-6953/2025 of June 26, 2025 [in Serbian].

¹²⁹ <https://europeanwesternbalkans.com/2024/07/19/eu-and-serbia-sign-a-memorandum-on-raw-materials-with-lithium-mine-in-sight/>.

¹³⁰ <https://n1info.rs/english/news/experts-warn-jadar-project-should-not-go-ahead/>.

term planning and a strategic approach to development. The state of democracy in Serbia has been gradually eroded over the last decade. Under the rule of the Serbian Progressive Party (SNS), which has been in power since 2012, Serbia has regressed from the status of a semi-consolidated democracy to a hybrid regime – an electoral autocracy with one of the highest rates of democratic erosion at the global level.¹³¹ Elections at all levels are held in highly irregular conditions that favor the ruling party, while power remains concentrated in the hands of the president of the state.¹³² The protection of human rights and fundamental freedoms has also been undermined, while the media are predominantly under regime control, with critics of the government exposed to discreditation and public attacks, intimidation, and even police repression.¹³³

Although it has been an EU membership candidate since 2012, Serbia has achieved very limited progress in the accession process – only two chapters have been provisionally closed. Since 2021, there has been no progress in negotiations, while annual European Commission reports persistently point to numerous challenges in implementing key reforms, including in the area of natural resource management and environmental protection. Serbia's regression has deepened further following the irregular elections in December 2023, which undermined the legitimacy of key institutions, and due to repression against civil society, environmental and student activists that has been ongoing since the summer of 2024.¹³⁴

LITHIUM EXPLOITATION PROJECT IN A CAPTURED STATE

The Jadar project represents one of the key polarizing issues in the domestic public sphere. The space for public dialogue has been narrowed by the undermining of democratic institutions and the rule of law.¹³⁵ More precisely, institutions in Serbia can be described as captured, which refers to a state in which individuals and/or groups gradually but systematically change the formal “rules of the game” to align them with their personal or special interests, at the expense of public interest.¹³⁶ These interests may include material gain or accumulation of political power at different levels of government, and are most often aimed at consolidating power as a means of strengthening further influence on decision-making and adapting those decisions to the particular interests of ruling groups.

The adaptation of the “rules of the game” in institutions of all branches of government and at all levels of governance best describes the course of implementing the Jadar project in Serbia, thereby preventing effective public debate and public participation in decision-making.

The Government's support was unequivocal from the project's announcement – it was declared strategically important and a unique development opportunity for Serbia. However, there was no inclusive and open discussion about the specific impacts of the project on the

¹³⁵ Katja Giebel, Mirko Popović and Jovan Rajić, “Lithium Mining in Serbia: “An Open and Productive Debate Is Not Possible”, July 18, 2024, <https://www.boell.de/en/2024/07/18/lithium-mining-serbia-open-and-productive-debate-not-possible>.

¹³⁶ Predrag Petrović, “State Capture in Serbia – A Conceptual and Contextual Introduction”, Security Sector Capture in Serbia – An Early Study, 2020. <http://dx.doi.org/10.55042/AZZW46a98>.

economy, environment and society. When President Vučić publicly stated that decisions are not being made because “we are waiting for Rio Tinto to come, to see what they have prepared and how they will protect the environment”,¹³⁷ decisions were already being made, without effective public participation. In Loznica, the spatial plan was amended to align with the Spatial Plan of the Special Purpose Area for the Jadar project, despite massive opposition from the local community. The Ministry of Environmental Protection then approved the company’s request for establishing the scope and content of the environmental impact assessment study, ignoring key objections from experts and civil society representatives.

The president announced that the project’s implementation could be decided by referendum at the local or national level. However, the Government initiated amendments to the Law on Referendum and Popular Initiative and the Law on Expropriation. The public perceived this as an attempt by the ruling majority to facilitate project implementation at the expense of public interest.¹³⁹ This provoked strong public reactions and led to protests and blockades across the country in November and December 2021. Faced with growing public dissatisfaction ahead of snap elections in April 2022, the Government eventually withdrew the proposed amendments to the laws and annulled the regulation on adopting the spatial plan, and all valid permits for the Jadar project. Demanding a permanent ban on lithium and boron mining projects in Serbia, civil society associations initiated a ban on lithium and boron mining, which was signed by more than 38,000 citizens and submitted to the National Assembly in May 2022.¹⁴⁰

However, the Assembly did not verify the citizens’ signatures, despite the legal obligation to do so, because the initiative was allegedly “lost”.¹⁴¹ In this way, the Assembly did not discuss this popular initiative despite its legal obligation. The suspension of the project remained based exclusively on the Government’s decision, which can be arbitrarily revoked just as easily as it was made, in accordance with the current political interests of the ruling majority. It soon became clear that the project was only temporarily “on hold” ahead of snap parliamentary elections, so as to meet the demands of a considerable part of the electorate.

In the meantime, the Ministry of Mining and Energy repeatedly extended the company’s deadline for obtaining an exploitation field permit, as many as 18 times over two years, without any explanation.¹⁴² This proved very convenient when the Government’s decision to suspend the project was annulled by the Constitutional Court just days before the signing of the Memoran-

¹³⁷ <https://www.slobodnaevropa.org/a/rio-tinto-rudnik-poslovanje-srbija/31576691.html>.

¹³⁸ Igor Todorović, “[Protests as City of Loznica in Serbia adopts spatial plan for Rio Tinto’s lithium project](#)”, Balkan Green Energy News, July 29, 2021.

¹³⁹ Igor Todorović, “[Masses block roads in Serbia in protest against lithium mining, controversial laws](#)”, Balkan Green Energy News, December 4, 2021.

¹⁴⁰ Insajder, “[Slučaj nestanka Inicijative sa 38.000 potpisa građana: Rokovi prošli, zakon prekršen, nadležni ne reaguju](#)”, July 24, 2024.

¹⁴¹ European Commission, Serbia 2023 Report, Brussels, November 8, 2023.

¹⁴² RERI, Ministry of Mining and Energy unjustifiably extends Rio Tinto’s deadline for obtaining lithium exploitation permit [in Serbian], April 11, 2023, <https://reri.org.rs/ministarstvo-rudarstva-i-energetike-neopravdano-produzava-rok-kompaniji-rio-tinto-za-dobijanje-dozvole-za-eksploataciju-litijuma/>.

dum of Understanding (MoU) on strategic partnership with the EU in the field of sustainable raw materials, battery value chains and electric vehicles.¹⁴³

These examples illustrate the manipulation of institutional and legal frameworks when it comes to a project whose implementation is strongly supported by the Government. Examples of various extractivist projects at the global level show that authoritarian governments resort to deregulation of legal frameworks, violation of procedures and clientelistic practices to ensure the most favorable conditions for investors.¹⁴⁴ Tendencies of constant reshaping of legal and institutional procedures, unjustified extensions of deadlines and selectively effective judicial mechanisms show that institutions do not function as independent guarantees of the rule of law, but as instruments in the service of particular interests, under the control of executive power. This not only undermines legal certainty and accountability, but also erodes citizens' trust in institutions, whereby public participation is systematically suppressed.

This was also confirmed during the public consultation on the Draft Strategy for Managing Mineral and Other Geological Resources in Serbia for the period from 2025 to 2040, with projections to 2050, which represented an opportunity for public participation in shaping policies in this area. Citizens' participation, however, was conditional on prior registration, although the date of the public consultation was announced only one day before it was held, and for most interested participants, including representatives of the expert public and civil society organizations, there was "no room" at the public consultation.¹⁴⁵ In this way, the possibility for inclusive dialogue on an important strategic and developmental issue was significantly limited, while the interested and expert public was prevented from influencing the content of this document, despite pointing out numerous harmful provisions, primarily when it comes to environmental protection and natural resources.¹⁴⁶

EU SUPPORT – EXTERNAL LEGITIMATION MECHANISM

Strong support for the project from EU and German officials has further expanded the regime's maneuvering space, given that claims about the project's benefits and sustainability very much rely on expected "guarantees from Europe".¹⁴⁷ This argument is frequently used to discredit existing criticisms about the project's harmful impacts in the domestic public sphere. European officials have praised the signing of the Memorandum of Understanding and the implementation of the Jadar project as an important step in Serbia's European integration process, a way to "confirm Serbia's European path," without insisting on fundamental

¹⁴³ Igor Todorović, "[Constitutional Court of Serbia rules in favor of Rio Tinto's lithium project](#)", Balkan Green Energy News, July 11, 2024.

¹⁴⁴ Olga Nikolić and Zoran Erić (eds.), "Lithium Mining and Ecological (In)Justice" [in Serbian], Belgrade: Institute for Philosophy and Social Theory, University of Belgrade, 2025.

¹⁴⁵ Jelisaveta Perišić, "[Public consultation on strategy for managing mineral resources held – citizens and experts dissatisfied](#)" [in Serbian], Balkan Green Energy News, August 7, 2025.

¹⁴⁶ Ibid.

¹⁴⁷ Radio Free Europe, "Serbian Government Restarts Rio Tinto's Contentious Lithium Mine Project", July 16, 2024, <https://www.rferl.org/a/serbia-lithium-mine-approved-rio-tinto/33038776.html>.

reforms and effective implementation of regulations, and without considering serious consequences for the environment and human rights.¹⁴⁸ The EU's symbolic support has enabled the Government of Serbia to present the project to the domestic public as a guarantee of Serbia's progress, not only in the EU accession process, but also on the international stage – as a way for Serbia to become “a reliable partner to Europe, Germany and the whole world in the full production chain”.¹⁴⁹

Support for the project without taking into account key problems regarding democratic governance and implementation of environmental protection regulations in Serbia, which are constantly pointed out in the European Commission's annual reports, threatens to undermine the credibility of the EU approach. Symbolic support for a government that does not implement substantial reforms and seriously undermines democracy and the rule of law as fundamental EU values may further contribute to the phenomenon of the “captured state.” Statements of support for the project from high EU officials may be interpreted as approval of the authorities' actions on the domestic front, including their attitude toward “critics” of the project, which further contributes to the suppression of existing criticisms and the weakening of accountability mechanisms.¹⁵⁰

This is particularly important given that repression against demonstrators, activists and civil society organizations opposing the project has progressively increased, escalating during mass protests across Serbia in July and August 2024 due to the project's relaunch. Against a backdrop of growing political divisions and an already highly polarized media landscape, the voices of local activists, civil society organizations and the academic community have increasingly faced negative campaigns and targeting by government representatives and pro-government media. Every form of organized citizen resistance to the project has been repressively quashed, most often under the pretext of hindering development and economic growth. Opponents of the project have been exposed to threats, especially in the digital space, where they have been labeled as “foreign agents,” “traitors” or even “eco-terrorists”.¹⁵¹ In addition to attacks in pro-regime media, activists have faced arbitrary police investigations and unlawful surveillance, which further testifies to the erosion of the rule of law and protection of fundamental rights and freedoms.¹⁵²

¹⁴⁸ European Commission, “[EU and Serbia sign strategic partnership on sustainable raw materials, battery value chains and electric vehicles](#)”, July 19, 2024.

¹⁴⁹ NIN, “Vučić: The project will mean Serbia's quantum leap into the future, I trust Scholz's word” [in Serbian], July 19, 2024, <https://www.nin.rs/politika/vesti/53329/vucic-projekat-ce-znaciti-kvantni-skok-srbije-u-buducnost-bicemo-pouzdan-partner>.

¹⁵⁰ Solveig Richter and Natasha Wunsch, “[Money, power, glory: the linkages between EU conditionality and state capture in the Western Balkans](#)”, *Journal of European Public Policy*, 27(1), 2020: 41-62.

¹⁵¹ Arthur Neslen, “Activist opposed to Rio Tinto lithium mine receives anonymous death threats”, *The Guardian*, August 22, 2024; Mašina, “‘They were dead silent’: Protest held in front of RTS against repression of activists”, September 2, 2024.

¹⁵² Amnesty International, “[Serbia: Authorities using spyware and Cellebrite forensic extraction tools to hack journalists and activists](#)”, December 16, 2024.

In its 2024 Report on Serbia, the European Commission reported on increased pressure on civil society and environmental activists, particularly highlighting arrests, home searches and seizure of activists' IT equipment after protests against lithium exploitation.¹⁵³ However, political statements in favor of the project proved far more effective in conveying the message than lengthy, bureaucratic reports. Linking the strategic partnership in the field of critical raw materials with Serbia's EU accession process has called into question the credibility of EU conditionality mechanisms, especially regarding the "fundamentals first" principle, which is emphasized in the new enlargement methodology. Brussels' strong support for the project was understood by the public as a message that the EU was placing its strategic interests ahead of substantial reforms, and such sentiment has further deepened in light of the ongoing political crisis in Serbia.¹⁵⁴

The European Commission's decision in June 2025 to recognize the Rio Tinto Jadar project as strategic within the CRMA regulation came during a period of historic protests in Serbia. The collapse of a canopy in Novi Sad, which claimed 16 lives, revealed corrupt practices, lack of accountability and inadequate institutional response, prompting months-long protests across Serbia. Amid increased regime repression, such a decision by the EU may send a strong message, particularly given the lack of response to numerous appeals from the academic community, experts, civil society organizations and students addressed to EU institutions. Ignoring the positions of important social actors could further affect growing citizen indifference toward the EU, which is reflected in a continuous and significant decline in support for EU membership in recent years.¹⁵⁵

LITHIUM EXPLOITATION – CAUSE OF SOCIAL DIVISIONS

Public opinion research shows that there is pronounced polarization in Serbia when it comes to lithium exploitation, with citizens' attitudes on this issue highly correlating with their political views. According to a Demostat poll from September 2024, about a third of respondents had a predominantly positive attitude toward environmental protests, with citizens who support the ruling party much more often having a negative attitude toward protests.¹⁵⁶ Namely, as many as 67% of citizens closer to the ruling party believed that protests against lithium and the construction of small hydroelectric plants are "exaggerated," while this is the view of only 5% of respondents closer to opposition parties.¹⁵⁷ On the other hand, when it comes to the project's impact on the environment and citizens' health, the majority of respondents (65%) trust experts the most, 7% the president of the state, while a significant number of citizens (20%) do not trust anyone, indicating a high degree of distrust in institutions.¹⁵⁸

¹⁵³ European Commission, [Serbia 2024 Report](#), SWD(2024) 695 final. Brussels, October 30, 2024.

¹⁵⁴ Marko Kmezić, "Student protests in Serbia: The eleventh hour for EU fundamentals", January 23, 2025, <https://www.biepag.eu/blog/student-protests-in-serbia-the-eleventh-hour-for-eu-fundamentals>.

¹⁵⁵ Regional Cooperation Council, "[Balkan Public Barometer](#)", 2024.

¹⁵⁶ Demostat, "[Presentation of Demostat research findings: Government?-Dissatisfaction/Institutions?-distrust/Life?-Satisfaction](#)" [in Serbian], October 9, 2024.

¹⁵⁷ Ibid

¹⁵⁸ Ibid

According to research from February 2025, several months after the start of student protests in Serbia, about 80% of Serbian citizens support most of the students' demands, while student protests in general were supported by 64% of citizens.¹⁵⁹ A high degree of distrust in institutions, however, is also present among citizens who do not support the protests (56.3%), while citizens who support the protests consider this, along with corruption, one of the biggest problems in Serbia (80.3%).¹⁶⁰ On the other hand, over half of citizens, 55.4%, consider lithium mining as one of the major problems in Serbia.¹⁶¹ According to public opinion polls conducted by the New Serbian Political Thought (NSPM) from June 2024 to July 2025, about 55-60% of Serbian citizens do not support the implementation of the Jadar project.¹⁶²

A negative attitude toward lithium mining is particularly pronounced among young people. Research by NSPM from December 2024 showed that as many as 88.2% of young people under 30 years of age oppose the Jadar project, while among those over 60 years of age this percentage is 34%, which also correlates with their political views.¹⁶³ This is also confirmed by the latest research by the National Youth Council of Serbia (KOMS) conducted among young people aged between 15 and 30 in April and May 2025, which shows that 93% of young people oppose lithium mining in Serbia in the near future.¹⁶⁴ The same research indicates that young people consider the state of the environment in Serbia to be poor, while 91.7% of them believe that the state does not contribute sufficiently to environmental protection, which is recognized among young people as one of the most significant values in society.¹⁶⁵

VIII MINING ACTIVITIES IN THE BOR REGION – HEALTH IMPACTS AND ENVIRONMENTAL REGULATION ENFORCEMENT

IMPACTS OF MINING ON HUMAN HEALTH

A study by the Ministry of Health, the Ministry of Environmental Protection and the Institute of Public Health of Serbia “Dr. Milan Jovanović Batut” concludes that with regard to malignant tumors other than skin tumors, there is a significantly higher risk of disease in both men and

¹⁵⁹ CRTA, “[Overwhelming support from Serbian citizens for student demands and protests](#)” [in Serbian], February 19, 2025.

¹⁶⁰ Institute of Social Sciences, “[Student and civic protests in Serbia](#)” [in Serbian], April 4, 2025.

¹⁶¹ Ibid.

¹⁶² Nova srpska politička misao: Lithium and Serbian public opinion [in Serbian]: <http://www.nspm.rs/istrazivanja-javnog-mnjenja/litijum-i-srpsko-javno-mnjenje.html>; <http://www.nspm.rs/istrazivanja-javnog-mnjenja/srbija-jul-2025-%E2%80%93-i-komparacija-sa-majem.html>.

¹⁶³ Nova srpska politička misao, “[December 2024 - government, opposition, Rio Tinto, EXPO and national stadium by age groups](#)” [in Serbian], January 3, 2025.

¹⁶⁴ National Youth Council of Serbia (KOMS), [Alternative Report on the Position and Needs of Young People in the Republic of Serbia 2025](#) [in Serbian], Belgrade, 2025.

¹⁶⁵ Ibid.

women;¹⁶⁶ when it comes to malignant tumors other than skin tumors, a significantly higher risk of death has been observed in both men and women in Bor.¹⁶⁷ Analysis by the Public Health Institute of Zaječar indicates that the expected life expectancy of the population of the Bor District in the period from 2018 to 2022 decreased by more than two years.¹⁶⁸

Despite the fact that available data clearly indicate alarming trends, relevant authorities have taken an irresponsible and passive approach, deliberately postponing the implementation of new analyses of impacts on human health. The aforementioned study, which was never officially published by state institutions, is based on data collected before Zijin took over the Mining and Smelting Basin Bor ("RTB Bor") in 2018. Taking into account data on increased emissions into air, water and soil due to mine expansion and intensification of smelter operations, it is reasonable to assume that current environmental indicators are even more alarming. Although the short-term action plan from 2021 prescribed that "the possibility will be ensured for all interested citizens of the city and residents of surrounding villages to undergo toxicological laboratory tests for heavy metals once a year, free of charge," according to publicly available information this activity has not been implemented to date.¹⁶⁹ On the other hand, the air quality plan for the city of Bor envisages that "an epidemiological study will be done that links the state of air quality with effects on human health".¹⁷⁰ However, the fact that the deadline for preparing the study has been postponed to 2033 defeats the very purpose of the analysis and prevents its use in adopting timely public health protection measures.

Taking into account the chronic lack of available data, but also the evident unwillingness to collect and analyze it, RERI initiated data analysis by independent health experts, with the aim of assessing the impact of exposure to heavy metals and sulfur dioxide on the health of

¹⁶⁶ This pattern is observed for specific cancer sites, including cancers of the colon and rectum, pancreas, kidney, bladder, thyroid gland, lymphopoietic tissue, Hodgkin's and non-Hodgkin's lymphoma, leukemia and mesothelioma, and a significantly higher risk of lung cancer has been registered in both men and women in Bor. Ministry of Health, Ministry of Environmental Protection and Institute of Public Health of Serbia "Dr. Milan Jovanović Batut", "Improvement of Contaminated Site Management in Serbia - Strengthening national capacities and intersectoral synergies in the field of safe management of contaminated sites and hazardous chemicals in order to prevent harmful effects on human health and the environment in the Republic of Serbia" [in Serbian], 2020, p. 30.

¹⁶⁷ A higher risk of death in both sexes has been registered for all diseases and disorders, diabetes mellitus, diseases of the circulatory system, diseases of the respiratory system, and congenital deformities, malformations and chromosomal aberrations. Ibid.

¹⁶⁸ The expected life expectancy in 2018 was 74 years, while in 2022 it drastically decreased to 71.99 years. See "Analysis of the health status of the population of the Bor district in the period from 2018 to 2022" [in Serbian], available at: chrome-extension://efaidnbmnnnibpcajpcgiclfefindmkaj/https://zavodzajecar.rs/wp-content/uploads/2024/08/Analiza-zdravstvenogstanjaokrugBor2018-2022_compressed.pdf.

¹⁶⁹ Short-term action plan for reducing air pollution in the city of Bor [in Serbian] ("Official Gazette of the City of Bor" no. 20/21).

¹⁷⁰ Air quality plan for the Bor agglomeration [in Serbian] ("Official Gazette of the City of Bor" no. 9/24).

Bor's population.¹⁷¹ Thus, according to an opinion compiled based on data on arsenic emissions in the air in the period from 2019 to 2024, residents of the Bor region suffer from chronic arsenic intoxication with consequent severe multisystemic damage (increased risk of developing numerous respiratory, neurological, malignant and other chronic diseases). The analysis also concluded that cancer risk among Bor residents exposed to long-term inhalation of elevated arsenic concentrations drastically increased at some measurement sites during 2019- 2021 compared to previous years. The cancer risk rate per 100,000 residents reached up to 277, depending on the measurement site. It was also pointed out that children are particularly vulnerable, and that arsenic exposure is associated with reduced intellectual function and neurocognitive and behavioral problems, while reproductive and developmental effects of arsenic exposure may include low birth weight, neonatal mortality and increased infant mortality. Also, according to expert opinion, recorded concentrations of cadmium in the air in Bor during 2023 and 2024 inevitably lead to acute symptoms, and in the case of exposure over a longer period of time, to kidney function disorders with severe irreversible kidney damage, as well as lung, prostate, kidney, testicular and other cancers. According to expert opinion, on days when sulfur dioxide concentrations dangerous to human health were recorded, the risk of respiratory morbidity increased manifold, manifesting as elevated rates of emergency examinations and hospital admissions due to respiratory diseases, particularly asthma. During certain days in 2020, this risk was found to be up to 32 times higher than baseline levels.

LAND DEGRADATION DUE TO MINING ACTIVITIES

The analysis of soil quality in Bor and its surroundings indicates long-term pollution associated with the activities of the mining and smelting complex. Although soil quality testing was conducted at 25 locations, the analysis neither assessed the consequences of the contamination nor examined its causes, extent, or degree, but was limited to presenting the sampling results. For this reason, a forensic expert was engaged to prepare an expert opinion, confirming that soil contamination results from continuous air, water and soil pollution arising from surface mining and metallurgical ore processing.¹⁷² The results show significant presence of heavy metals (arsenic, cadmium, chromium, nickel, lead and mercury), with concentrations at multiple locations measuring two to three times above reference values.¹⁷³

¹⁷¹ The author of the expert opinions is Dragana Jovanović, a distinguished pulmonologist in Serbia, retired professor of internal medicine and palliative medicine at the Faculty of Medicine, University of Belgrade, Doctor of Medical Sciences, specialist in pneumophthisiology, specialist in pulmonology and (pulmo)oncology, founder of the specialization program in palliative medicine and head of the Department of Palliative Medicine 2012-2019. From 1979 until her retirement in 2019, she worked at the Institute for Pulmonary Diseases and Tuberculosis of the Clinical Center of Serbia (KCS), specifically at the KCS's Clinic for Pulmonology, and from 1996 until retirement she was head of the clinical department. She was also director of the Institute for Pulmonary Diseases, founder of the Center for Interventional Pulmonology at the KCS Institute for Pulmonary Diseases, and founder of the Palliative Care Unit and the Cancer Pain Clinic at the KCS Institute for Pulmonary Diseases. She is the author/co-author of more than 370 scientific papers. She is the founder of the Association of Pulmonologists of Serbia and founder and first president of the Respiratory Society of Serbia.

¹⁷² Opinion of forensic expert Snežana Milošević no. 4-2023-1 dated August 30, 2023 [in Serbian].

¹⁷³ Analysis Report no. 1440/23 by the Institute for Mining and Metallurgy Bor [in Serbian], <https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fbor.rs%2Fwp-content%2Fuploads%2F2023%2F05%2Fizvestaj-o-ispitivan-ju-GU-Bor-1440-23.docx&wdOrigin=BROWSELINK>.

In addition to heavy metals, the analysis also detected carcinogenic volatile organic compounds, including toluene and xylene, attributable to traffic and heavy machinery operations at surface mines. The consequences of such pollution are reflected in the loss of soil fertility, degradation of vegetation and wildlife, and increased health risks for the population due to long-term exposure. Based on measured contamination levels, the need for implementing remediation measures has been identified at multiple locations, indicating serious ecological consequences of mining activities and the lack of a comprehensive approach to assessing impacts on soil and biodiversity.

OVERSIGHT OF REGULATORY IMPLEMENTATION

If grounded in adequate legal provisions that are consistently applied, inspection supervision represents the most important and effective mechanism in the system of legal environmental protection, intended for timely prevention of violations and harm. As a first-instance mechanism, inspection supervision should order companies to bring their operations into compliance with regulations and prevent further violations. As such, it should be easily accessible to citizens and ensure a timely response from relevant authorities. However, in recent years the role of inspection has been marginalized, especially in the oversight of large infrastructure and investment projects that are designated as projects of “strategic” or “national” importance. Obstructed and ineffective communication with relevant inspection authorities, combined with systematic failure to act on requests for extraordinary inspection supervision, has resulted in ineffective protection and severe erosion of public trust in existing institutional protection mechanisms.

The systemic problem is not related to individual oversights, but to the way the inspection system interprets its role: extraordinary inspection supervision initiated by citizens is reduced in practice to an exception, even in situations where there is obvious and serious risk. This denies opportunities not only for prevention but also for documenting illegalities. Consequently, companies go unpunished, which can result in significant and often irreparable damage to citizens and the environment. Thus, the Ministry of Environmental Protection has established a practice of responding to almost all requests for conducting extraordinary inspection supervision with the statement that regular inspection supervision is planned on an annual basis, without explaining why it considers that the conditions for urgent action are not met. However, the purpose of regular and extraordinary inspection supervision are completely different in legal terms, which is why the law prescribes conditions for conducting each of these two types of supervision. In accordance with current regulations, an inspector can refuse to conduct extraordinary inspection supervision only in two cases: if they assess that there is no significant risk or if the applicant is abusing the right to initiate inspection supervision.¹⁷⁴ However, RERI's requests involved serious risks to health and the environment in almost every case and represented an exercise of the right to initiate inspection supervision, not an abuse of it. For example, although the arsenic content in Bor far exceeded permitted values at every measuring station in the city during 2022, the Ministry of Environmental Protection concluded that the

¹⁷⁴ Article 18, paragraph 5 of the Law on Inspection Supervision [in Serbian].

level of risk was insufficient to initiate extraordinary inspection supervision proceedings. It also noted that heavy metal emissions had been subject to verification through regular inspection.¹⁷⁵ On the other hand, in cases where certain facilities were not covered by the inspection supervision plan, since they were built illegally, without building permits and an environmental impact assessment, the environmental protection inspection resorted to either completely disregarding submitted requests entirely or forwarding them to authorities lacking jurisdiction over the matter. The inspection of the Ministry of Construction, Transport and Infrastructure in a significant number of cases delayed inspection supervision until building permits were obtained, after which it suspended proceedings on the grounds that the company had obtained the necessary permits.¹⁷⁶

CASE STUDY: DIVERSION OF THE KRIVELJ RIVERBED DUE TO LANDFILL EXPANSION

The illegal construction of a bypass tunnel for the Krivelj River, Bor River and Saraka Stream in the zone of the Veliki Krivelj flotation tailings pond represents one of the most illustrative examples of the passivity of inspection authorities and abuse of regulations in supervising the work of mining companies. The Serbia Zijin Copper company has been carrying out work on tunnel construction since 2022 without a decision approving the execution of mining works. These activities also include the construction of a dam and reservoir downstream from the Krivelj village, which are being implemented without obtained water permits and without a conducted environmental impact assessment. Due to the absence of an impact assessment, it is not known whether the Bor River has the capacity to receive redirected waters from the Krivelj and Bor Rivers, which exposes residents of the villages of Krivelj and Slatina to direct risk of flash floods. Additionally, excavated material resulting from tunnel excavation is being deposited in the depression below the Bor Mining and Smelting Complex's flotation tailings pond, designated for receiving material in the event of an accident, thereby further endangering the lives, health and property of the population.

The inspection of the Ministry of Construction, Transport and Infrastructure did not act on requests for conducting extraordinary inspection supervision. Subsequently, information obtained through a request for access to information of public importance showed that Serbia Zijin Copper notified the inspection about commencing "urgent" work on the construction of the Krivelj River bypass tunnel, without having previously obtained a building permit. Al-

¹⁷⁵ More information on arsenic emissions in Bor available at <https://reri.org.rs/otrovna-prasina-opasnija-tisina/> [in Serbian].

¹⁷⁶ For example, in April 2022, RERI submitted a request for inspection supervision of Serbia Zijin Copper to the Ministry of Construction, Transport and Infrastructure because the reconstruction of the Bor smelter was being carried out without appropriate permits and provided all necessary evidence. In correspondence from the Ministry of Construction, Transport and Infrastructure no. 363-354-00127/2022-18 dated February 13, 2023, after several follow-ups, RERI was informed that the inspection carried out inspection supervision on June 22, 2022. Just a week later, the company obtained permits, and the procedure was suspended. The inspector did not file charges against the company.

though the Law on Planning and Construction provides for an exception that enables work without a building permit exclusively based on an inspector's decision, no such decision was made in this case. Nor did the construction inspection issue an order or approval for the works or redirecting the flow of the Krivelj River.¹⁷⁷ Instead, the inspection accepted that a simple notification from the company could replace the legally prescribed procedure and "legalize" the undertaken works.¹⁷⁸ In parallel, the Ministry of Environmental Protection forwarded RERI's request to the Ministry of Mining and Energy, claiming it lacked jurisdiction to assess whether facilities are being built without environmental impact assessment. Meanwhile, RERI received no response to its objections and appeals – a case of administrative silence.¹⁷⁹ Only the inspection of the Ministry of Agriculture, Forestry and Water Management determined that the project is being implemented without previously obtained water permit and initiated appropriate penalty proceedings. However, follow-up inspections were not conducted. As a result, authorities failed to establish that activities were continuing without necessary permits, and that the tunnel was already in use, despite continuous requests from the local community and RERI.

In none of the inspection supervision proceedings initiated before relevant authorities was RERI enabled to actively participate in the procedure as a representative of public interest.¹⁸⁰ Even more problematic is the newly established practice whereby members of the local community are not recognized as having party status in inspection supervision proceedings. This is despite the fact that illegal exploitation activities are carried out directly in front of their homes and undoubtedly and directly affect their rights and interests.¹⁸¹ Thus, inspection supervision in practice is reduced to a closed procedure between the inspection and the investor, preventing citizens and organizations that protect public interest from effective protection of rights and control of the work of inspection authorities.

¹⁷⁷ Article 143 of the Law on Planning and Construction [in Serbian] ("Official Gazette of RS", nos. 72/09, 81/09, 64/10, 24/11, 121/12, 42/13, 50/13, 98/13, 132/14, 145/14, 83/18, 31/19, 37/19, 9/20, 52/21, 62/23 and 91/25).

¹⁷⁸ Minutes of the Ministry of Construction, Transport and Infrastructure no. 363-354-00195/2022-18 dated October 3, 2022 [in Serbian].

¹⁷⁹ Correspondence from the Ministry of Environmental Protection no. 353-03-00043/38/2022-07 dated July 6, 2022 [in Serbian].

¹⁸⁰ For example, see decisions of the Ministry of Mining and Energy no. 000087874 2025 14820 007 003 042 002 of March 6, 2025 and no. 003570053 2024 14820 007 003 042 002 of February 28, 2025, Decisions of the Ministry of Environmental Protection no. 915-480-501-16/2022-07 of May 19, 2022 and no. 910-480-501-00063/2021-04 of February 18, 2022 [in Serbian].

¹⁸¹ Conclusion of the Ministry of Mining and Energy, Sector for Geology and Mining, Department of Geological and Mining Inspection, no. 001831532 2025 14820 007 003 070 001 dated May 29, 2025 [in Serbian].

CASE STUDY: ILLEGAL OPERATIONS AT ZAGRAĐE LIME FACTORY STOPPED ONLY AFTER ADMINISTRATIVE INSPECTION RESPONSE

Serbia Zijin Copper's lime factory, which was expanded and put into operation before obtaining building and operating permits, represents an example of enabling multi-year violation of regulations due to the absence of timely inspection response. During a three-year period, the Ministry of Construction, Transport and Infrastructure and the Ministry of Mining and Energy passed responsibility back and forth for inspection supervision, claiming they lacked jurisdiction to conduct supervision over the factory's operations. Illegal activities were discovered only after the administrative inspection initiated oversight of the construction inspection's work and issued multiple follow-ups. At that point, a ban on operations was imposed until the company obtained necessary permits, due to endangerment of human lives and health and environmental safety.¹⁸² The company has not obtained operating permits to date.

SANCTIONS IN CASE OF REGULATORY VIOLATIONS

While inspection supervision primarily represents a preventive protection mechanism, the issue of companies' criminal liability for violating regulations also represents a repressive mechanism aimed to motivate the specific company, and other ones, to comply with relevant regulations. Serbian law recognizes criminal liability for environmental pollution, but prescribes liability for that criminal offense exclusively in the case where the consequence is pollution of air, water or soil.¹⁸³ The Criminal Code does not cover cases where pollution creates a risk to human health, which represents a fundamental legislative gap and lack of alignment with European Union *acquis*.¹⁸⁴

INADEQUATE PUNISHMENT FOR YEARS-LONG POLLUTION

Serbia Zijin Copper has for years emitted enormous quantities of polluting and hazardous substances, which has led to pollution of air, water and soil, as well as increased risk of carcinogenic diseases in Bor and the surrounding area. Air quality in Bor has been classified as excessively polluted during all years of the company's operations. However, although the Law

¹⁸² Correspondence from the Ministry of Public Administration and Local Self-Government, Administrative Inspectorate, no. 001243835 2025 14800 010 004 070 002 dated June 9, 2025 [in Serbian].

¹⁸³ Article 260 of the Criminal Code of the Republic of Serbia [in Serbian] ("Official Gazette of RS", nos. 85/05, 88/05, 107/05, 72/09, 111/09, 121/12, 104/13, 108/14, 94/16, 35/19 and 94/24).

¹⁸⁴ Directive (EU) 2024/1203 of the European Parliament and of the Council of April 11, 2024 on the protection of the environment through criminal law.

on Liability of Legal Entities for Criminal Offenses¹⁸⁵ is in force in Serbia, under which companies can be held liable and sanctioned for environmental crimes, the company has not been adequately sanctioned to date, in a manner sufficient to compel compliance with regulations.

RERI filed criminal charges against the company Serbia Zijin Copper in 2021 for the criminal offense of Environmental Pollution, due to years of violating environmental protection regulations. After criminal proceedings, the company was convicted in the first instance by the Basic Court in Bor.¹⁸⁶ The court found that from 2019 to 2020, by violating regulations related to environmental protection, preservation and improvement, the company polluted the air, water, and soil in Bor, thereby endangering human health and increasing carcinogenic risk for the population. However, although the judgment undoubtedly established the impact of pollution on human health, the court was limited by existing legal norms and prescribed penalties, and sentenced the company to a penalty insufficient to motivate it to align its operations with laws.¹⁸⁷

The existing regulatory framework clearly fails to deter Serbia Zijin Copper and similar companies from further violations. Investigative evidentiary actions are, at the time of writing, being conducted against this company before the Basic Public Prosecutor's Office in Bor for the same criminal offense covering 2020 to 2022. Meanwhile, RERI, together with ten residents of Krivelj, Bor and Slatina, filed a criminal complaint for air, soil, and water pollution during the period 2022 to 2023. The years-long continuity of court proceedings against the same company for the same criminal offense indicates that the existing punishment model is neither adequate nor effective.

In practice, illegal construction without appropriate building permits represents one of the most common regulatory violations in large mining project. This violation is continuously repeated due to inadequate judicial response. The unwillingness of public prosecutor's offices to act in a timely and adequate manner against companies that illegally build complex facilities is particularly noticeable, despite clear legal authority to prosecute and a precisely defined criminal offense of construction without a building permit. Despite criminal complaints filed by RERI, public prosecutor's offices have not submitted a single indictment, and consequently courts have not issued a single conviction for this criminal offense.

IMPUNITY FOR ILLEGAL CONSTRUCTION

When it comes to multinational mining companies, in practice it has almost become the rule to build complex construction facilities without a building permit. However, although Construction Without a Building Permit is prescribed as a criminal offense by the Criminal Code, the relevant public prosecutor's offices show lack of interest in prosecuting Serbia Zijin Cop-

¹⁸⁵ Law on Liability of Legal Entities for Criminal Offenses [in Serbian] ("Official Gazette of RS", no. 97/08).

¹⁸⁶ Judgment of the Basic Court in Bor K19/24 dated September 3, 2024 [in Serbian].

¹⁸⁷ The company Serbia Zijin Copper was sentenced by judgment K 19/24 to a monetary fine of one million dinars.

per.¹⁸⁸ For example, in 2021 RERI submitted to the Basic Public Prosecutor's Office in Bor a criminal complaint against this company and the responsible person due to suspicion that they committed the criminal offense of Construction Without a Building Permit, that is, carried out work on increasing the capacity of the smelter within the mining and smelting complex. However, although RERI, along with the criminal complaint and its subsequent amendments, provided relevant evidentiary material, the public prosecutor's office in Bor continues to conduct evidentiary proceedings without making a decision on the submitted complaint. Such conduct – effectively allowing time to pass without initiating court proceedings – carries a serious risk that the statute of limitations for criminal prosecution will expire, while public interest is further endangered by illegal construction of complex facilities without established construction conditions.

RECOMMENDATIONS

RECOMMENDATIONS FOR THE EUROPEAN UNION

Political support for strategic projects of importance to the EU, such as critical raw materials exploitation projects, must be based on knowledge of the real conditions in partner countries. The EU's interest in critical raw materials in its neighborhood is recognized as a priority for preserving the Union's competitiveness at the global level and implementing the green transition. However, this cannot be accompanied by neglect of human rights violations and erosion of democracy and the rule of law in countries that possess mineral resources.

The European Commission should review the decision to grant strategic project status to the Jadar project, because such recognition should depend on strategic decision-making about the project at the national level and be conditional on observing democratic principles and the rule of law, including transparency, public participation and respect for environmental protection standards.

Full transparency should be ensured in the implementation of the Memorandum of Understanding in the field of critical raw materials, including publication of the roadmap and outcomes from institutional mechanisms and working bodies implementing the Memorandum. EU institutions should insist on publishing information about the course of preparation and content of documents whose preparation is envisaged by the Memorandum, and on regularly informing the public about the work of joint working bodies and ministerial meetings. Transparency of implementation must become the standard, not the exception, especially for projects with high risks for society and the environment.

¹⁸⁸ Article 219a of the Criminal Code [in Serbian].

RECOMMENDATIONS FOR GOVERNMENTS OF SERBIA AND BOSNIA AND HERZEGOVINA

The Governments of Serbia and Bosnia and Herzegovina should adopt key strategic documents in the areas of economic development, spatial planning, mining and mineral resource management that are based on genuine social dialogue, timely public information provision and meaningful participation of local communities. The absence of such a framework reinforces arbitrary institutional decision-making and increases the risk of conflicts and abuses. Key strategic documents must identify, describe and assess risks to vital resources (water, air, soil) and base decisions on mineral exploitation on the capacity to protect and preserve these resources.

Governments must thoroughly review legal provisions that enable broadly and imprecisely defined exceptions regarding the conversion of agricultural and forest land, declaration of public interest and award of concessions. Exceptions must be strictly limited, clearly justified and subject to independent control, so as to prevent systemic abuses.

RECOMMENDATIONS FOR IMPROVING PENAL POLICY AND SUPERVISION

Courts in Serbia and Bosnia and Herzegovina should consistently recognize the procedural legitimacy (party status in proceedings) of civil society organizations in proceedings concerning environmental protection.

The judiciary should use existing legal provisions to ensure genuine individual and corporate accountability for environmental pollution and regulatory violations, while laws should prescribe stricter sanctions with deterrent effects – especially in cases of recidivism (repeated violations of law). Mild and symbolic penalties encourage repetition of violations and undermine public trust in the rule of law.

Inspection authorities bear direct institutional responsibility for preventing and stopping illegal and harmful activities in mining. In cases of high risk to human health and the environment, the absence of a timely, coordinated and decisive inspection response must be treated as a serious institutional failure, not as a matter of discretion. Clear accountability mechanisms must be established for inspection inaction, including mandatory public documentation of inspections carried out, measures taken, and reasons for any inaction.

ABOUT THE AUTHORS

Jovan Rajić is an attorney-at-law specializing in human rights and environmental law and the founder of RERI. He dedicates his practice to defending public interest, advancing institutional accountability and protecting the environment through strategic litigation.

Darjana Macanović is a legal advisor at RERI, with a background in international law and human rights. At RERI, she is working on environmental protection and the right to a healthy environment, with a focus on corporate accountability and access to justice.

Mirko Popović is the Programme Director of the Platform for Social Development and Innovation. He is an independent policy analyst specializing in environmental and energy governance with extensive experience in preparing policy reports, analyses, and research studies. He has a proven track record of providing strategic advice to civil society organisations, public authorities, and international organisations.

Jovan Cvijetinović is a master spatial planner with many years of experience in the drafting of spatial and urban planning documents, where he acquired the licenses of responsible planner and responsible urban planner. During his professional engagement in the public and civil sector, he participated in the drafting and analysis of documents of environmental, technical documentation and environmental impact assessment. In his work, he uses geospatial data analysis tools such as QGIS.

Ivana Milićević is a Research Assistant at the Institute for Philosophy and Social Theory (IFDT) and a PhD student in International and European Studies at the Faculty of Political Science, University of Belgrade. Her work focuses on regional and European integration, as well as environmental policy research. She has been a BiEPAG fellow at the Centre for Southeast European Studies, University of Graz.

Hristina Vojvodić is a Senior Legal Advisor at the Platform for Social Development and Innovation, with many years of experience in environmental, climate, mining, and energy law. Her work focuses on major polluters, preventive environmental mechanisms, access to justice, and human rights standards in environmental governance. She is a PhD candidate at the Faculty of Law, University of Belgrade, in the field of commercial law.

Ljubica Vukčević is a Senior Legal Adviser at the Platform for Social Development and Innovation and an attorney with extensive experience in environmental law. Throughout her career, she has represented clients in environmental litigation, including criminal proceedings and expropriation cases. She has also conducted legal analyses in the fields of environmental, energy, and climate policy, focusing on environmental impacts, regulatory compliance, and relevant legislation.

CHAPTER 4

MINING IN THE WESTERN BALKANS: WHO REALLY PROFITS?¹

Biljana Jovanović, Kristijan Fidanovski, Branimir Jovanović

¹ This chapter reports monetary values in the currency in which the original data are expressed, either EUR or USD. As the EUR/USD exchange rate was close to parity at the time of writing, no conversion into a common currency was applied.

INTRODUCTION

In recent years, the mining sector in the Western Balkans has moved to the forefront of public and policy debates, driven by several large extraction projects across the region. The most prominent examples include Rio Tinto's proposed Jadar lithium mine in Serbia, the proposed Lopare lithium project in Bosnia and Herzegovina, the operating Rupice mine (silver, gold, zinc) in Bosnia and Herzegovina, and the Chinese-owned copper and gold operations in Serbia's Bor region. At the same time, earlier attempts to develop large-scale mines have faced strong local resistance – most notably in the south-east of North Macedonia, where plans for a large copper-gold project were eventually halted following sustained protests. These developments have rekindled longstanding questions about who really benefits from mining in the region, and at what economic, social, and environmental cost.

This chapter aims to contribute to that debate by examining the economic significance of the mining sector in the six Western Balkan economies – Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia and Serbia. First, we analyze available macroeconomic data on mining – including value added, employment, investment, and wages – to assess the overall size and significance of the sector in each economy and in the region as a whole. We then disaggregate to the firm level, drawing on company financial statements to document how many firms operate in the sector, what their financial results are, how many workers they employ, how much they pay in wages, how much they contribute in taxes, and how much profit accrues to their owners. Finally, we complement this quantitative analysis with four case studies of major mining projects in the region.

This chapter aims not only to quantify the economic importance of mining but also to examine its distributional dimension – specifically, the share of value captured by owners (through profits), by workers (through wages) and by the state (through taxes) – to determine who really benefits from mining in the Western Balkans. By documenting both the economic importance of mining and who really benefits from it, we aim to complement debates that focus primarily on environmental impacts, democratic accountability, and the political instrumentalisation of mining projects.

MACROECONOMIC ANALYSIS

OVERVIEW

The macroeconomic analysis reviews the main trends in the mining sector in the Western Balkans over the past 10–15 years. The data come from the Annual Database of the Vienna Institute for International Economic Studies (wiiw Annual Database) and refer to NACE sector B (Mining and Quarrying), which includes oil and gas extraction. We document trends in value

added, employment, wages and investment, to highlight the key developments in the mining sector in the six economies.

The mining sector in the Western Balkans remains relatively small and, in most countries, has generally been declining in economic importance over the past decade. Limited investment, depleted reserves, and structural shifts toward services and manufacturing have contributed to a downward trend in both output and employment across much of the region.

The structure of the mining sector in the region is highly heterogeneous, reflecting differences in natural endowments and historical development paths. With regard to oil and gas, Albania stands out as the region's only significant crude oil producer, with petroleum accounting for an important share of the sector's value added. Serbia also produces small amounts of oil and natural gas, while hydrocarbon output in the remaining Western Balkan countries is negligible.

Mineral and metal mining also shows wide variations across the region. Albania's mining sector is anchored by chromite production, alongside smaller outputs of copper, nickel, and limestone. Bosnia and Herzegovina and Kosovo remain heavily coal-based, with more limited metal mining, whereas North Macedonia and Montenegro rely primarily on metals and industrial minerals such as copper, gold, lead-zinc, and bauxite. Serbia has one of the most diversified mining sectors in the region, with copper and lignite as its dominant subsectors. It also holds significant lithium potential associated with the controversial Jadar project, which is currently suspended.

VALUE ADDED

Across the Western Balkans, the mining and quarrying sector accounts for between 1% and 3% of GDP, being usually among the five smallest of the roughly 20 NACE sectors, but with a share of GDP several times larger than the average EU country² In Albania, Bosnia and Herzegovina, Montenegro, and North Macedonia, its share is approximately 1%, while in Kosovo it is about 1.5%. Serbia is the only country with a noticeably higher share, at approximately 3%.

In Albania, Bosnia and Herzegovina, and Kosovo, the mining share has gradually eroded as other sectors – particularly services – have expanded more rapidly. Albania experienced a short-term increase around 2012–2014, driven by growing oil production and a major expansion in investment and output at the Bulqizë chromium mine.³ However, this boost turned proved temporary: with the subsequent decline in commodity prices, the mining sector's share of val-

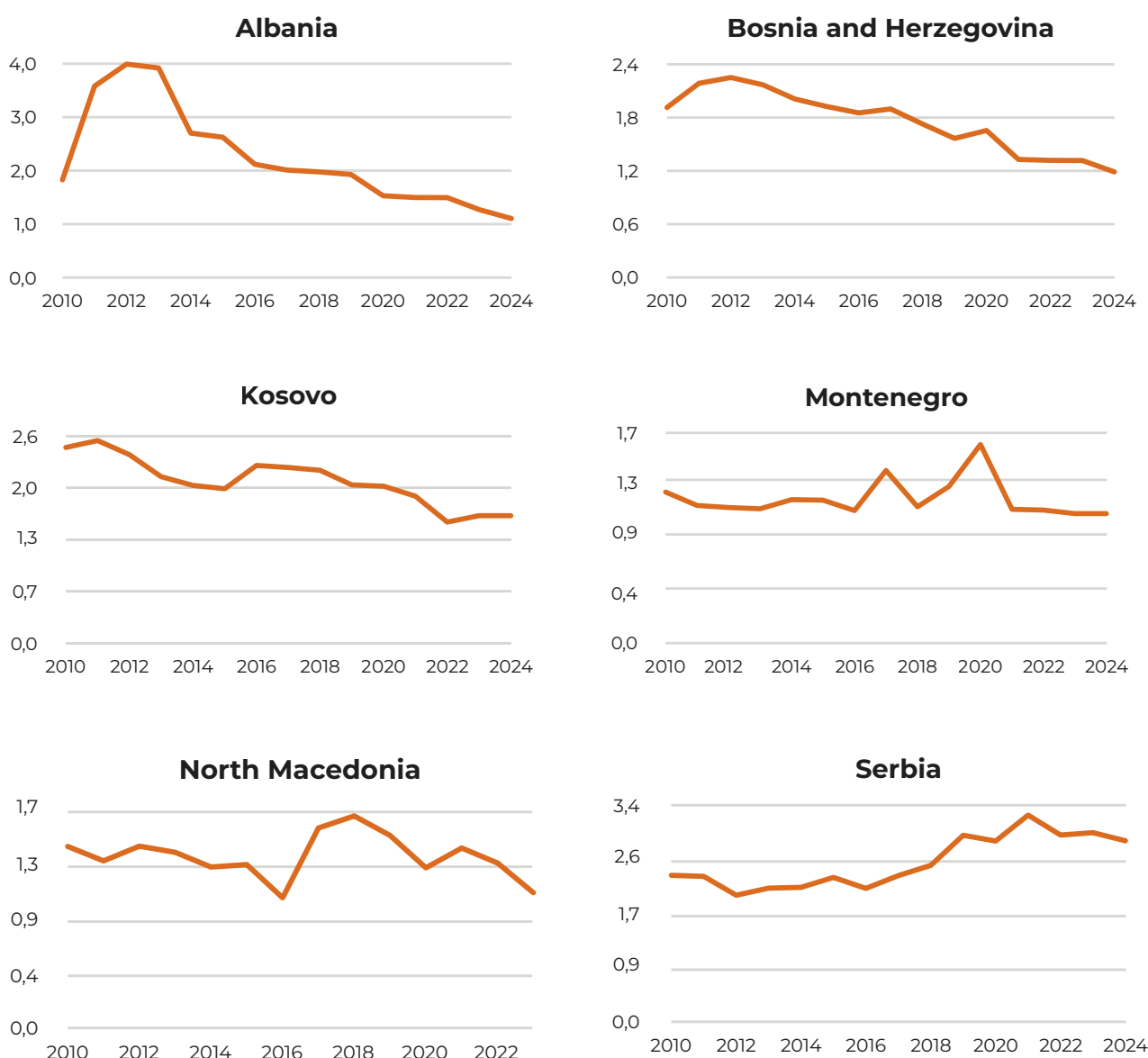
² OECD (2025). Enhancing Regional Mining Ecosystems in the European Union. https://www.oecd.org/en/publications/enhancing-regional-mining-ecosystems-in-the-european-union_97ba1224-en/full-report/strengths-and-challenges-in-eu-mining-regions_49afad58.html

³ EITI. (2015). Albania 2013–2014 EITI Report. <https://eiti.org/documents/albania-2013-2014-eiti-report>

ue added resumed its downward trend.⁴ In Montenegro and North Macedonia, the share remained mostly stable but is relatively small (slightly above 1% of GDP) throughout the period.

Serbia stands out as the only Western Balkan country where the mining sector has recently shown a moderate upward trend. The sector's share of GDP has increased from 2.3% in 2010 to around 3% in recent years, reflecting increased production in copper mining largely driven by the revitalization of RTB Bor following its acquisition by Chinese investors.⁵

Figure 1. Value added in the mining and quarrying sector in the Western Balkan economies, the 2010-2024, % of GDP



Source: wiiw Annual Database. Data for North Macedonia available until 2023.

⁴ Tirana Times. (2015). Mining royalty dropped by 30% in 2014. <https://www.tiranatimes.com/mining-royalty-dropped-by-30-in-2014/>

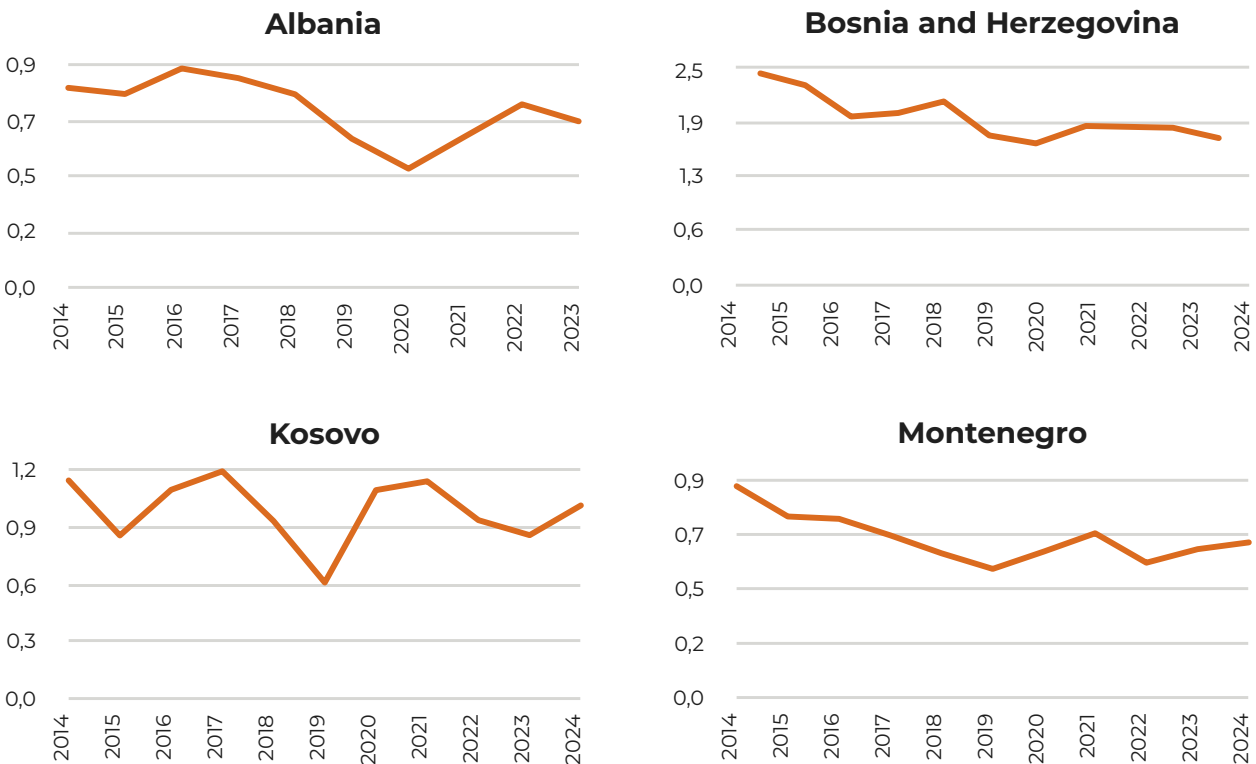
⁵ Serbia Business. (2025). Serbia's mining moment: Incentives vs. obstacles for international operators. <https://serbia-business.eu/serbias-mining-moment-incentives-vs-obstacles-for-international-operators/>

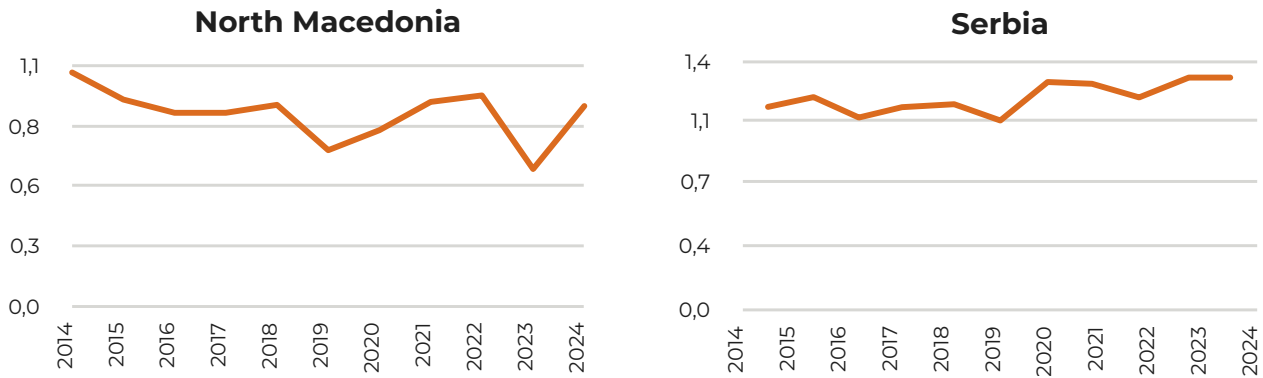
EMPLOYMENT

Employment patterns reflect the declining economic importance of the mining sector. The sector accounts for a very small share of total employment across the region, typically around 1%. Bosnia and Herzegovina maintains a slightly larger share (1.7% in 2024) due to the higher number of employees in the state-owned coal mines, but even there the overall trend points downward.

Employment shares have fallen in all Western Balkan economies except Serbia. The largest decline has been in Bosnia and Herzegovina, where the share fell from 2.4% in 2014 to 1.7% in 2024. Serbia is the only country where there is a modest upward trend – from 1.1% in 2014 to 1.3% in 2024 – broadly consistent with the Chinese takeover and expansion of operations at the Bor mine. However, the increase in employment has been smaller than the increase in value added. In recent years the employment share (around 1.3%) has remained well below the value-added share (around 3%), indicating that mining in Serbia is highly capital intensive, with high value added per worker and relatively limited direct job creation.

Figure 2. Employment in the mining sector in the Western Balkan economies, 2014-2024 (% of total employment)

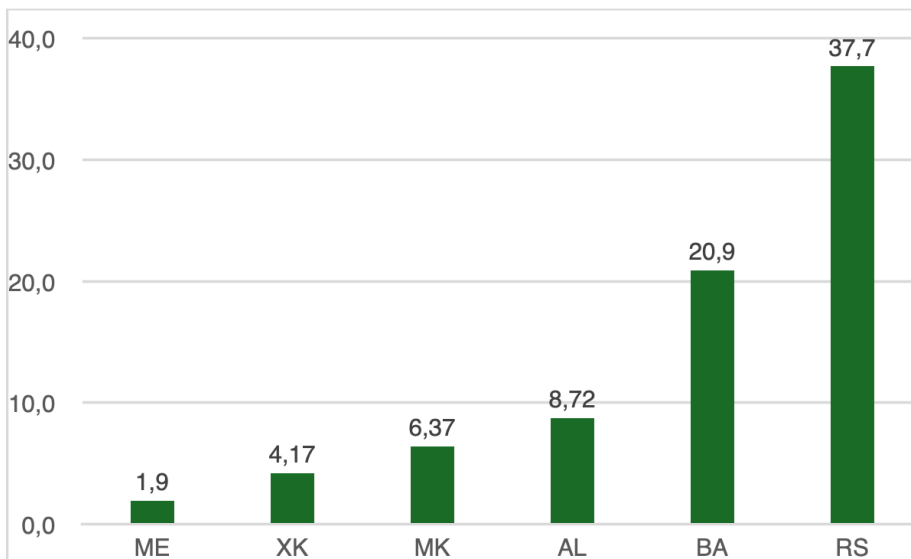




Source: wiiw Annual Database

The sector employs relatively few workers in most economies – in the low thousands. Montenegro has around 2,000 employees, Kosovo about 4,000, North Macedonia around 6,000, and Albania around 9,000. Bosnia and Herzegovina has roughly 21,000 mining workers, while Serbia has around 38,000 (Figure 3).

Figure 3. Employment in the mining sector in the Western Balkan economies in 2024 (thousands of employees)

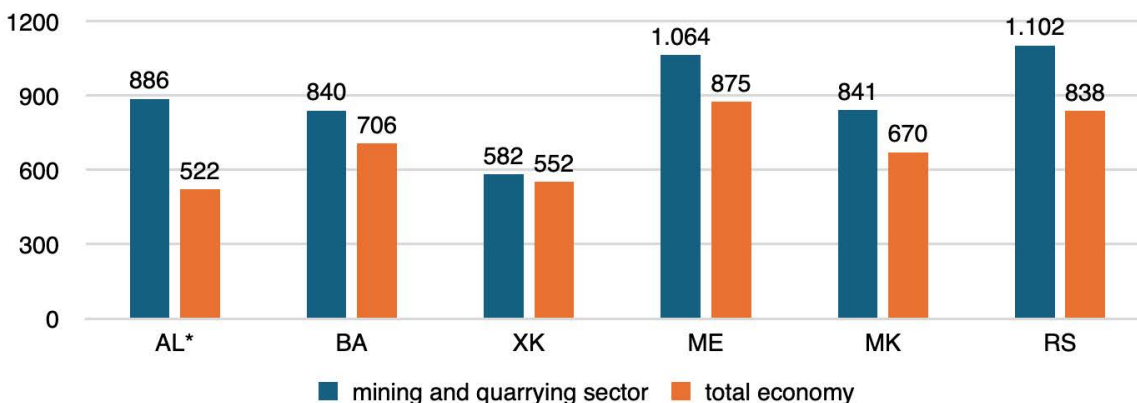


Note: The latest available data for Albania refer to 2023. Source: wiiw Annual Database

WAGES

Wages in the mining sector are moderately to significantly above the national average across the Western Balkans. The wage premium ranges from around 5% in Kosovo to almost 70% in Albania, and stands at 20–30% in the remaining four economies (Figure 4). This premium, which is also common outside the region, largely reflects the specific working conditions in the sector, including elevated occupational safety risks, exposure to hazardous environments, and the physical intensity of mining operations.

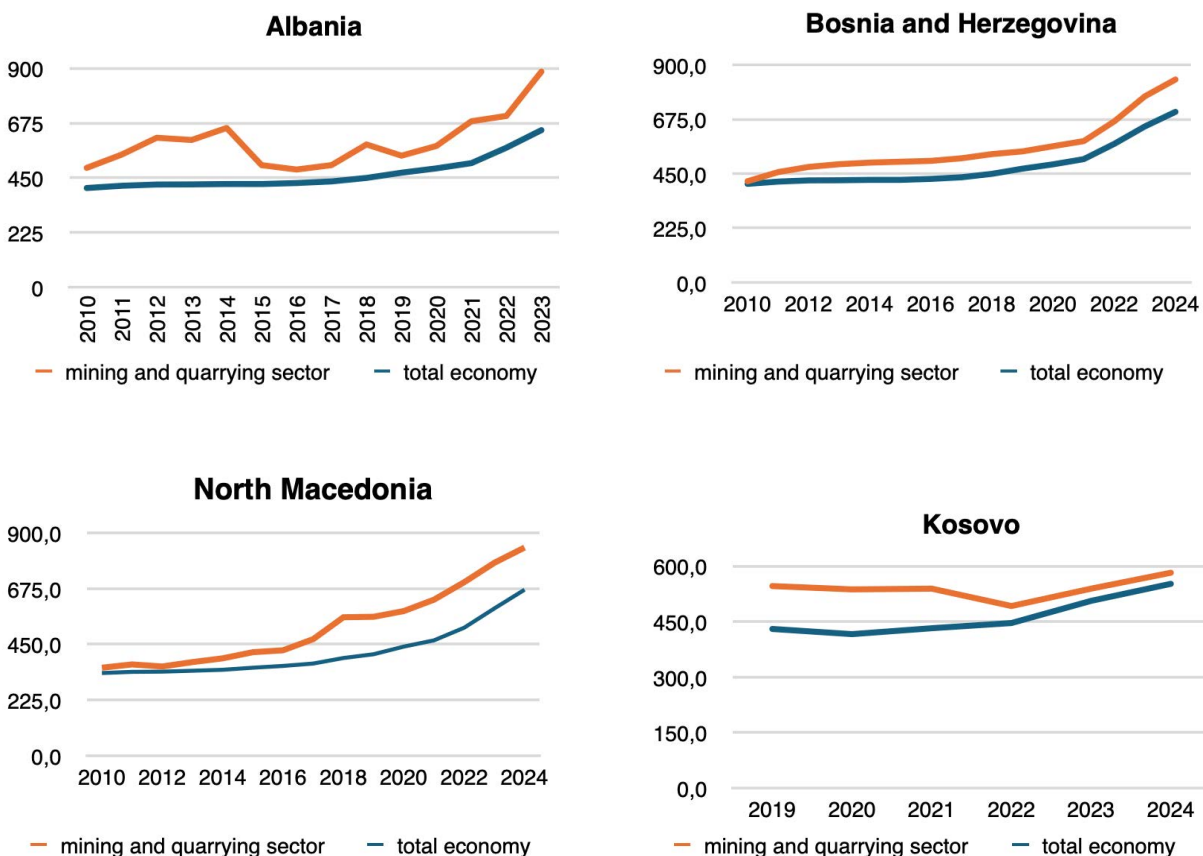
Figure 4. Net wages in the mining and quarrying sector in 2024 (EUR)

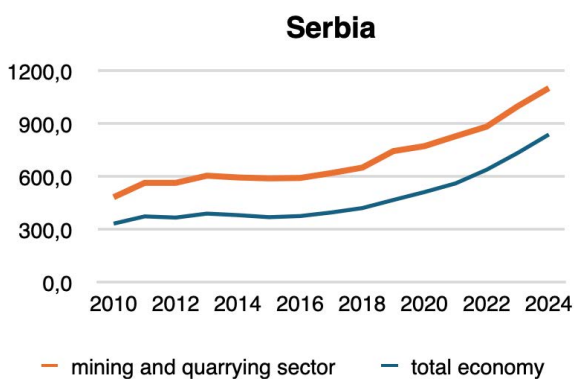
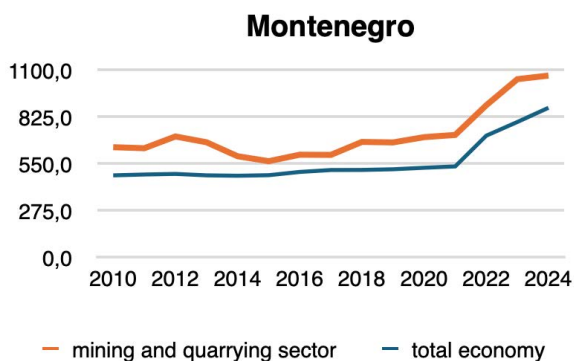


Note: The latest available data for Albania refer to 2023. Source: wiiw Annual Database

Wages in the mining sector have increased steadily over the past decade, broadly consistent with the upward trend in economy-wide wages. The cumulative increase ranges from around 70% in Bosnia and Herzegovina to around 150% in Serbia. However, mining wages have grown faster than average economy-wide wages only in Bosnia and Herzegovina and North Macedonia.

Figure 5. Net monthly wages in the mining and quarrying sector, 2010-2024 (EUR)



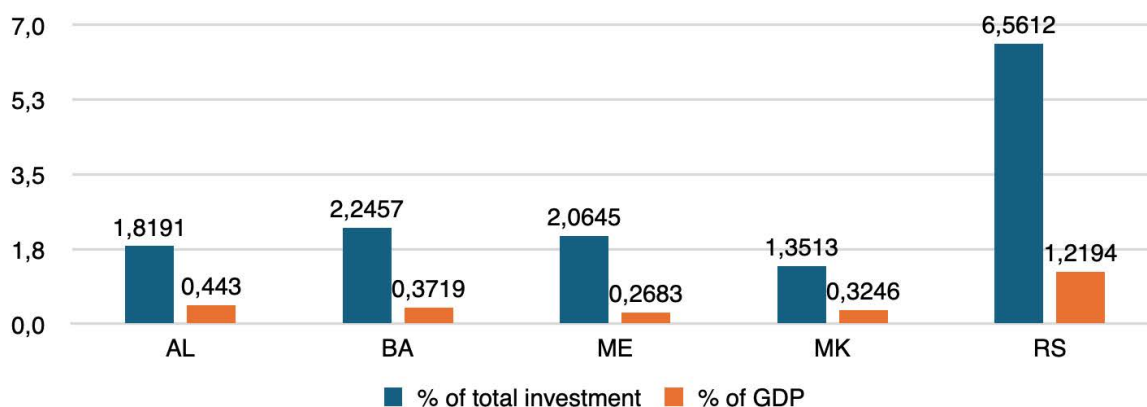


Source: wiiw Annual Database

INVESTMENT

Investment patterns across the Western Balkans are consistent with the picture of mining as having relatively modest economic importance in the region, although investment shares are somewhat higher because of the sector's high capital intensity. Available data suggest that the mining sector remains a limited contributor to capital formation across the region – mining-related fixed investments in the region accounts for around 2% of total investment and roughly 0.5% of GDP, with Serbia as a notable exception. In Serbia, mining investment accounts for around 7% of total investment and about 1.2% of GDP in 2024 (Figure 6), reflecting substantial capital inflows tied to the operations of Zijin Mining and the company's revitalization of the copper mining complex.

Figure 6. Gross fixed investment in the mining and quarrying sector, latest available year



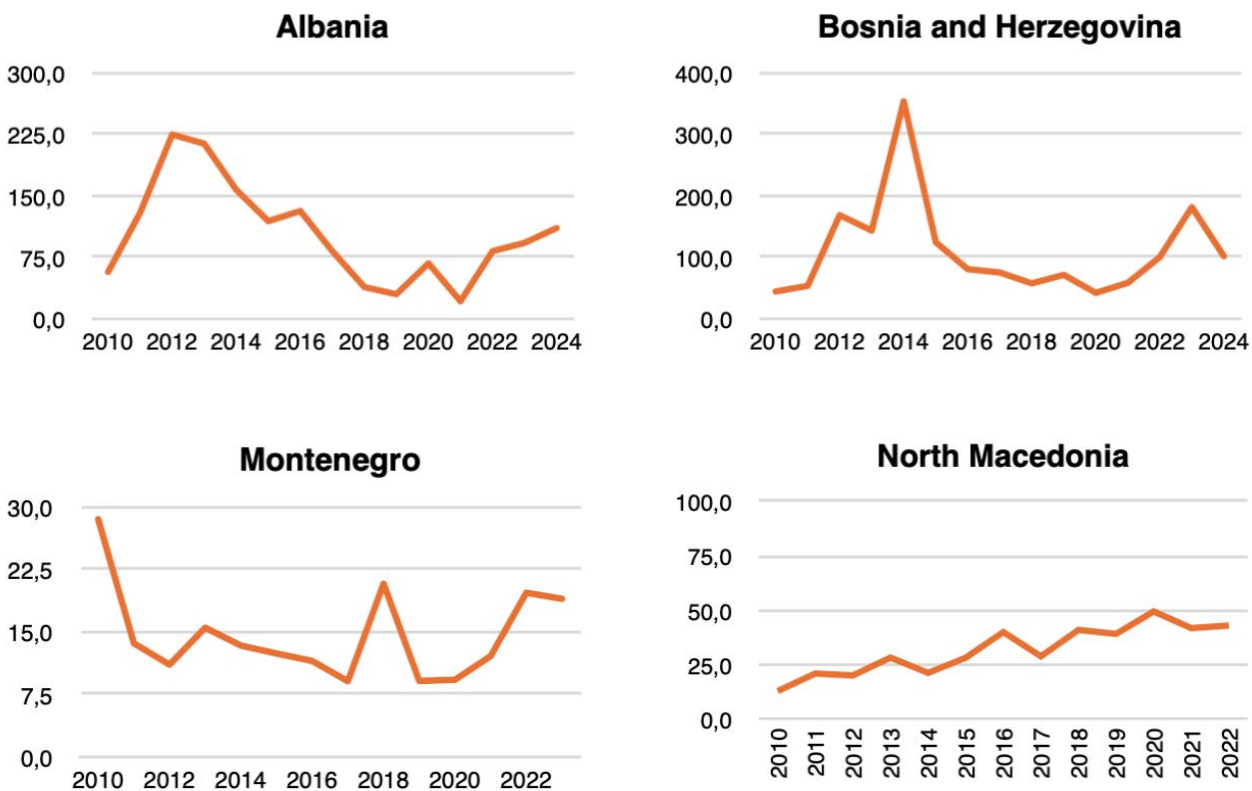
Note: Latest available year refers to 2022 for North Macedonia, 2023 for Montenegro, and 2024 for Albania, Bosnia and Herzegovina and Serbia. Source: wiiw Annual Database and National Statistical Offices.

Nominal investment in the mining sector has remained low and declined in most countries over time. There have been occasional spikes linked to specific projects or commodity-price surges. In Albania, mining investment in 2024 amounted to around €110 million, having remained below this level for most of the preceding decade. Larger inflows were recorded only during 2012–2014, when major projects – particularly at the Bulqizë chromium mine – temporarily pushed annual investment above €200 million. Bosnia and Herzegovina shows a similar

pattern, with investment now around €100 million and fluctuating around that amount for most of the period, except for a spike to about €350 million in 2014, linked to investment in new coal-mining capacity. In Montenegro, mining investment has generally remained at or below €20 million per year, while in North Macedonia it has hovered around €40 million (Figure 7).

Serbia is again the only clear exception. After 2020, investment in mining surged as the Chinese company Zijin Mining Group expanded copper production and exploration following its acquisition of the Bor complex in 2018. Between 2018 and 2024, the company invested around \$2.5 billion (approximately €2.3 billion)⁶ in its copper-mining operations in Serbia. Official data indicate mining investment of about €1 billion across the whole sector in 2024.

Figure 7. Gross fixed investment in the mining sector, 2010-2024 (EUR million)



⁶ BalkanEngineer.com. (2024). The investments of the Chinese company Zijin Mining Group in Serbia reached 2.3 billion euros. <https://balkanengineer.com/news/investments-chinese-company-zijin-mining-group-serbia-reached>



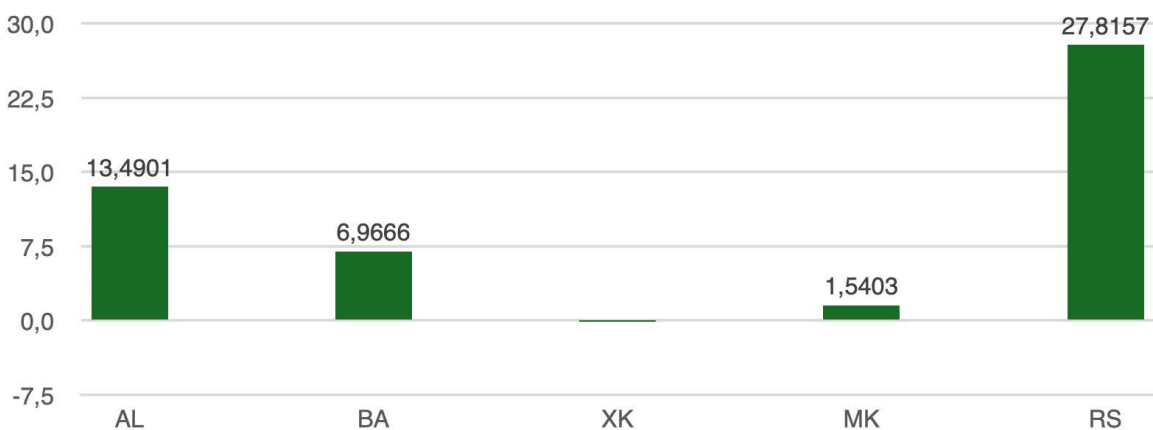
Note: Kosovo does not publish data on investment by sectors. Source: wiiw Annual Database and National Statistical Offices.

FOREIGN DIRECT INVESTMENT

Mining’s share is somewhat more pronounced in foreign direct investment than in GDP or employment. In 2024, Serbia recorded 28% of its FDI inflows in the mining and quarrying sector. As discussed previously, this is primarily driven by Chinese investment in copper mining: Zijin Mining has been investing consistently since 2018, and according to publicly available reports, its cumulative investment in Serbian mining operations had reached around €2.3 billion by 2024. Overall, Serbia remains by a wide margin the leading destination for mining-sector FDI in the region.

Other Western Balkan economies have much smaller mining-related FDI shares, though some remain significant. In Albania, the share of FDI inflows going to mining and quarrying was around 13.5% in 2024, largely owing to AlbChrome, the country’s main chromium and ferrochrome producer, which has reportedly invested more than €43 million over the past five years. In Bosnia and Herzegovina, sectoral breakdowns show a more modest share of FDI flows into mining – around 7% of total FDI inflows in 2024. In Kosovo and North Macedonia, mining-sector FDI remains very limited, at below 2% of total FDI inflows.

Figure 8. FDI in the mining and quarrying sector in 2024 (% of total FDI inflows)

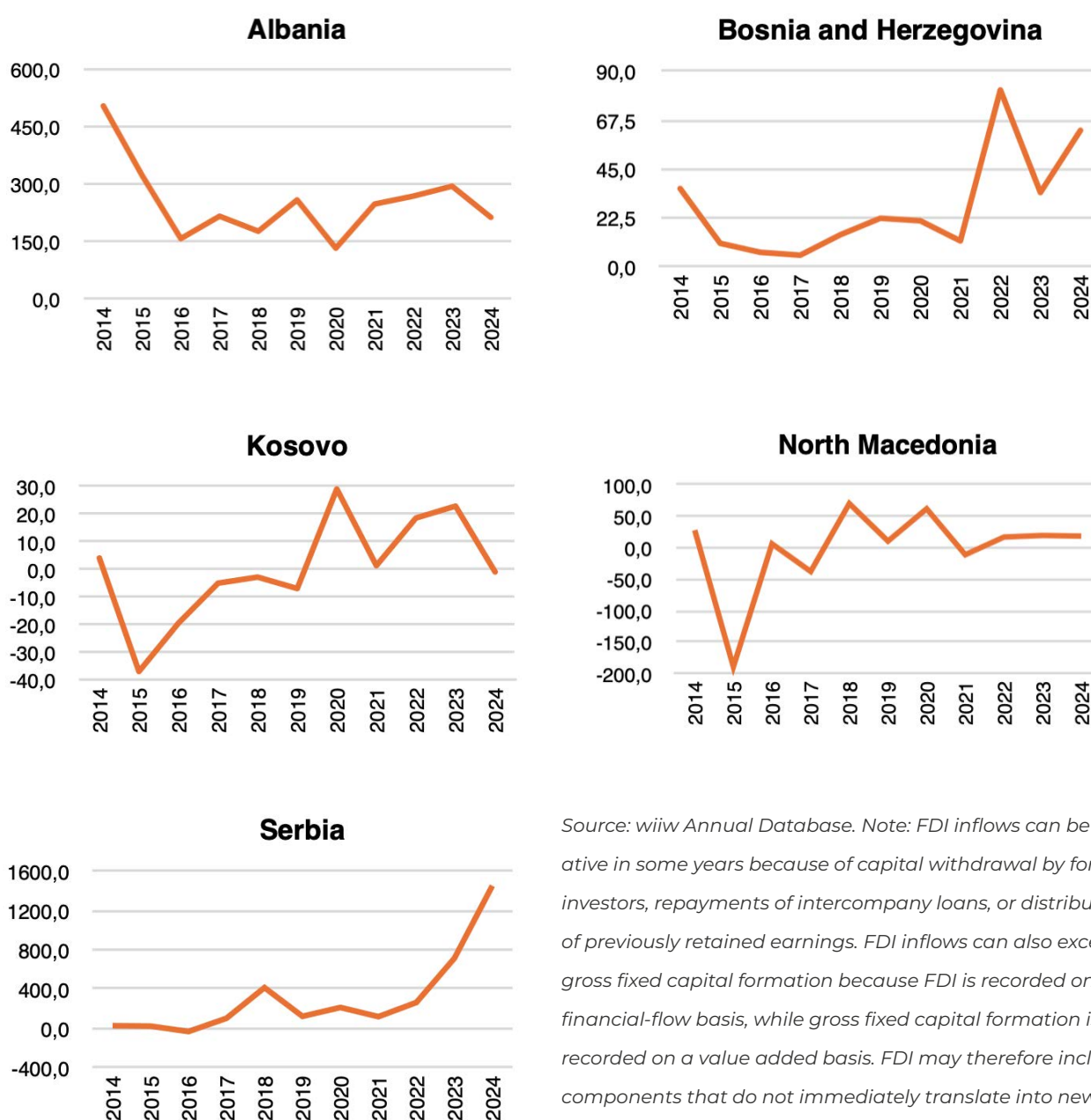


Source: wiiw Annual Database.

Nominal FDI inflows into mining over time follow trends similar to those observed for total investment. In Albania, inflows have declined over the past decade and in recent years have stabilized at around €200 million per year. In Bosnia and Herzegovina, FDI in mining has increased somewhat but remains low, at around €50 million annually in recent years. Kosovo's inflows fluctuate, but generally lie in the €10–20 million range, with a North Macedonia showing a similarly modest and variable pattern.

Serbia is again the main exception. FDI inflows into mining ranged between €100 and €200 million per year until 2022, before surging in recent years to reach approximately €1.5 billion in 2024.

Figure 9. FDI in the mining and quarrying sector, 2014-2024 (EUR million)



Source: wiiw Annual Database. Note: FDI inflows can be negative in some years because of capital withdrawal by foreign investors, repayments of intercompany loans, or distribution of previously retained earnings. FDI inflows can also exceed gross fixed capital formation because FDI is recorded on a financial-flow basis, while gross fixed capital formation is recorded on a value added basis. FDI may therefore include components that do not immediately translate into new value added, such as acquisitions of existing assets and intercompany debt flows.

FIRM-LEVEL ANALYSIS

INTRODUCTION

This section analyzes available firm-level data on medium and large companies operating in the mining sector in the Western Balkans, to examine how the sector operates. The analysis covers company numbers, employment, total and average wages, profitability, tax payments, ownership structure, and mineral types extracted. The data used here come from the annual financial statements that companies submit to central registries in their countries.

Firm-level data are available for four of the six Western Balkan economies – Bosnia and Herzegovina, Montenegro, North Macedonia and Serbia. The sample includes medium and large enterprises, meaning that small and micro companies are excluded. The data exclude oil and gas and focus only on mining. In practice, we include firms classified in the US SIC system as: Metal Mining, Anthracite Mining, Bituminous Coal and Lignite Mining, and Mining and Quarrying of Non-Metallic Minerals (Except Fuels). Our analysis focuses on 2022, the year for which we have the best and most comparable coverage across the four countries. We therefore do not analyze trends over time, as historical data are less complete and of lower quality. The results are presented country by country, providing a cross-country snapshot of the mining sector based on a common set of indicators.

BOSNIA AND HERZEGOVINA

The mining sector in Bosnia and Herzegovina is dominated by domestically owned coal mines, closely linked to state-owned power utilities. In 2022, it comprised 63 medium and large companies, of which 38% were domestically owned and 22% foreign-owned, with ownership information unavailable for the remaining 40%. The largest employers were domestic firms. Most foreign owners came from other European countries; companies with known ownership included only two smaller Russian-owned firms and no Chinese-owned companies, and the largest foreign-owned mine was controlled by a company based in Luxembourg. By number of firms, the sector was dominated by producers of non-metallic minerals, accounting for 67% of all companies, followed by coal mines (17%) and metal mines (16%). However, coal mines were by far the largest employers, accounting for more than 60% of total employment in the sector, and the major coal mines were domestically owned and typically integrated with state-owned power utilities.

Altogether, these companies employed 9,477 workers – roughly half of the mining employment reported in the macroeconomic data, which likely reflects the exclusion of numerous small firms predominantly engaged in the extraction of construction materials (stone, sand, gravel). These companies spent a total of \$153.4 million on employee compensation⁷, corre-

⁷ Wage data in the firm-level analysis include labor taxes, i.e. refer to the gross wage, unless specified otherwise.

sponding to an average gross monthly salary of \$1,349, which is consistent with the macroeconomic data. The sector paid around \$1.9 million in taxes and recorded an aggregate loss after tax of \$28.3 million in 2022. This loss stems entirely from the state-owned coal mines, which have long operated at a deficit, being required to supply electricity at regulated, low prices and operate under non-market conditions that prevent them from covering costs from operating revenues.

If the coal mines are excluded, the remaining mines are highly profitable, with a total net profit after tax of around \$20 million, compared with total employee costs of about \$44 million and tax payments of around \$1.4 million. The simple average EBIT margin across firms was 13%, indicating that many companies operate with healthy operating margins and that the negative aggregate result for the sector is driven by a small number of loss-making coal mines.

Table 1. Snapshot of the mining sector in Bosnia and Herzegovina in 2022

Number of companies	63
Ownership	38% domestic, 22% foreign, 40% no info
Types of mines	67% W-metallic, 17% coal, 16% metals
Total employees	9477
Total employee compensation	\$153.4 m
Average gross monthly salary	\$1,349
Total taxes paid	\$1.9 m
Total profit after taxes	- \$28.3 M
EBIT margin (simple average)	13%

Source: Annual financial statements submitted to national business registries.

MONTENEGRO

The mining sector in Montenegro is also dominated by a domestically owned coal mine, closely integrated with the state-owned power utility and its only coal-fired thermal power plant. The sector is small, reflecting the country's size: in 2022 it comprised 13 medium and large companies, of which 31% were domestically owned and 23% foreign-owned, while for the remaining 46% ownership information was not available. By number of firms, the sector is dominated by producers of non-metallic minerals, which accounted for 83% of all companies, with coal and metal mines each accounting for around 8%. However, the main coal mine dominated the aggregate picture, employing more than half of all workers in the sector and generating more than half of total profits.

Altogether, these 13 firms employed 1,913 workers in 2022 – the same number as in the macro analysis. They spent around \$30 million on employee compensation, which corresponds to

an average gross monthly wage of \$1,307, very close to the figure obtained from the macro data. The sector paid approximately \$4.4 million in taxes and generated a net profit after tax of about \$17 million. Profitability indicators are relatively strong: the simple average EBIT margin across firms was 24%, suggesting that many of the companies operate with healthy operating margins and that, unlike in Bosnia and Herzegovina, the sector as a whole was clearly profitable.

Table 2. Snapshot of the mining sector in Montenegro in 2022

Number of companies	13
Ownership	31% domestic, 23% foreign, 46% unknown
Types of mines	83% non-metallic, 8% coal, 8% metal
Total employees	1,913
Total employee compensation	\$30 m
Average gross monthly salary	\$1,307
Total taxes paid	\$4.4 m
Total profit after taxes	\$17 M
EBIT margin (simple average)	24%

Source: Annual financial statements submitted to national business registries.

NORTH MACEDONIA

The mining sector in North Macedonia is slightly more diversified than Bosnia and Herzegovina and Montenegro, with metal mines dominating. There is no single dominant mine; instead, there are several sizeable operations, mostly in metals, some domestically owned and others foreign-owned. In 2022, there were 51 medium and large companies operating in mining, of which 65% were domestically owned and 14% foreign-owned, while for the remaining 21% ownership information was not available. Despite the numerical dominance of domestic firms, the largest mine in the country by number of employees is foreign-owned (Bulgarian), as was the third largest (Greek-owned). By number of firms, the sector was dominated by producers of non-metallic minerals (80%), with metal mines accounting for 16% and coal mines for only 4%. However, this masks the underlying structure, as roughly two-thirds of all employees worked in metal mines.

Altogether, these companies employed 3,493 workers – more than half the employment figure reported in the macroeconomic data, which likely reflects the exclusion of micro and small firms from this part of the analysis. The companies spent around \$53 million on employee compensation, corresponding to an average gross monthly wage of \$1,265 (consistent with the macroeconomic data). The sector paid about \$10 million in taxes and generated a net profit after tax of about \$86 million in 2022 – substantially exceeding total employee compen-

sation. Profitability was strong: the simple average EBIT margin across firms is 23%, indicating that mining companies in North Macedonia generally operated with high operating margins and that the sector as a whole was clearly profitable.

Table 3. Snapshot of the mining sector in North Macedonia in 2022

Number of companies	51
Ownership	65% domestic, 14% foreign, 21% unknown
Types of mines	80% non-metallic, 4% coal, 16% metal
Total employees	3,493
Total employee compensation	\$53 m
Average gross monthly salary	\$1,265
Total taxes paid	\$10 m
Total profit after taxes	\$86 M
EBIT margin (simple average)	23%

Source: Annual financial statements submitted to national business registries.

SERBIA

The mining sector in Serbia is the most diversified in the region, both by ownership and types of mines, although activity is still heavily concentrated in a few large operations. In 2022, the sector comprised 91 medium and large companies, of which 65% were domestically owned and 23% foreign-owned, with ownership information unavailable for the remaining 12%. By number of firms, non-metallic minerals dominated (85% of all companies), while metal mines accounted for 11% and coal mines for 4%. However, metals and coal clearly dominated in economic terms. Two large Chinese-owned metal mines form the core of the sector, while coal mining – mostly in domestic hands – also accounts for a substantial share of employment and output. By contrast, the numerous non-metallic mineral producers are small by employment and other key indicators.

Altogether, these 91 companies employed 17,568 workers – less than half the employment figure in the macroeconomic data, owing to the exclusion of oil and gas extraction from the firm-level sample, which is more significant in Serbia than elsewhere. The companies spent around \$285 million on employee compensation in 2022, corresponding to an average gross monthly wage of \$1,351 – consistent with other economies in the region and with the macroeconomic data. The sector paid about \$49 million in taxes and generated an exceptionally high net profit after tax of \$907 million. The average EBIT margin across firms was 15%, indicating robust profitability overall, with profitability concentrated primarily in metal mining.

The largest mines record far higher profitability than the sector average. The biggest mine –

the Chinese-owned Čukaru Peki – reported an EBIT margin of around 74% in 2022, while RTB Bor, also Chinese-owned and the second largest, had an EBIT margin of about 42%. In other words, their annual operating profits amounted to roughly three quarters and two fifths of their sales – a exceptionally high profitability. On the other hand, the two big state-owned coal mines operated at a loss in 2022, for similar reasons to those in Bosnia and Herzegovina.

Table 4. Snapshot of the mining sector in Serbia in 2022

Number of companies	91
Ownership	65% domestic, 23% foreign, 12% unknown
Types of mines	85% non-metallic, 4% coal, 11% metal
Total employees	17,568
Total employee compensation	\$285 m
Average gross monthly salary	\$1,351
Total taxes paid	\$49 m
Total profit after taxes	\$907 M
EBIT margin (simple average)	15%

Source: Annual financial statements submitted to national business registries.

SUMMARY OF THE FIRM-LEVEL ANALYSIS, OR WHO GAINS THE MOST?

The firm-level data confirm that mining in the Western Balkans employs relatively few workers, pays wages somewhat above the national average, and – in most cases – generates sizeable profits for their owners, while contributing relatively modest amounts in taxes.

Table 5. Comparison of salaries, taxes, and profits of mining companies in the Western Balkans in 2022

Country	Employee compensation (USD million)	State taxes (USD million)	Owners' profits (USD million)
Bosnia and Herzegovina	153.4	1.9	-28.3
Montenegro	30.0	4.4	17.0
North Macedonia	53.0	10.0	86.0
Serbia	285.0	49.0	907.0
Total	521.4	65.3	981.7

Source: Annual financial statements submitted to national business registries.

In Bosnia and Herzegovina, the sector paid \$153.4 million in wages, contributed only \$1.9 million in taxes, and recorded an aggregate loss of \$28.3 million, due entirely to loss-making state-owned coal mines. If these state-owned mines were excluded, the sector was highly profitable, generating net profits of \$20 million, with total employee compensation of \$44 million and tax payments of around \$1.4 million.

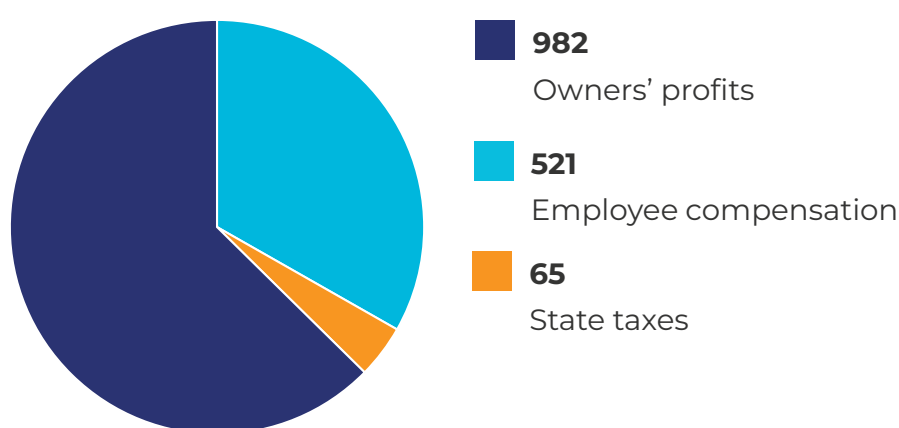
In Montenegro, employee compensation amounted to \$30 million, compared with \$4.4 million in taxes and \$17 million in net profits, so workers receive a somewhat larger share of the value added than owners, while the state gained relatively little.

In North Macedonia, the picture is starker: \$53 million in employee compensation and \$10 million in taxes compare with \$86 million in net profits, meaning that owners capture a clearly larger share than workers or the state.

Finally, in Serbia the imbalance was most pronounced – the sector paid \$285 million in employee compensation and \$49 million in taxes, but generated \$907 million in net profits, implying that the bulk of the gains accrued to owners, particularly in the large foreign-owned metal mines.

At the regional level, profits were almost twice as large as the total wage bill and around fifteen times higher than tax payments. The medium and large mining companies in these four economies paid \$521.4 million in wages in 2022, contributed \$65.3 million in taxes, and generated \$981.7 million in net profits (Figure 10).

Figure 10. Distribution of value added generated by the medium and large mining companies in the four Western Balkan economies in this analysis, 2022 (USD million)



Source: Annual financial statements submitted to national business registries.

This pattern indicates that, where mining is profitable in the Western Balkans, the sector primarily benefits its owners – often foreign – while workers and especially the state capture a much smaller share of the value added.

CASE STUDY ANALYSIS

This section presents four case studies of major mining projects in the region. Specifically, we examine two already operational projects in the metal extraction sector: the Rupice mine in Bosnia and Herzegovina, which contains silver, gold, lead, zinc, copper, antimony, and other critical raw materials; and the Bor mining and smelting complex in eastern Serbia, which primarily produces copper and gold. We also analyze two planned but not yet operational projects focused on the extraction and processing of lithium: the Jadar project in Serbia and the Lopare project in Bosnia and Herzegovina.

Each case study includes a brief historical overview and an assessment of economic contributions, outcomes, and profitability. We also discuss the main criticisms and controversies associated with these projects. The case studies reinforce the findings of the preceding sections. In particular, the evidence suggests that mining companies contribute relatively modest amounts in taxes, wages, and social contributions, while royalty payments are particularly low across all four cases. At the same time, these projects generate very high profits and feature projected breakeven periods of only a few years, raising important questions about the distribution of economic benefits and the long-term development impact of large-scale mining investments in the region.

RUPICE – DUNDEE/ADRIATIC METALS

The Rupice mine in Bosnia and Herzegovina, which contains silver, gold, lead, zinc, copper, antimony, and other critical raw materials, is a particularly difficult case to assess in socioeconomic terms. On the one hand, it records some of the strongest performance indicators in the region, as measured by its contribution to municipal and national GDP, and its operating company Adriatic Metals (recently purchased by Dundee) has devoted considerable effort to enhancing its public profile and presenting itself as a responsible local community partner. On the other hand, it stands accused of having obtained substantially preferential royalty rates at several key stages of the approval process.

Overview

In the spring of 2013, the Bosnian mining company MM Project (later renamed “Eastern Mining”) acquired an existing lead, zinc, and baryte mine in the small town of Vareš, located in the Zenica-Doboj canton of the Federation of Bosnia and Herzegovina, with a population of around 8,000. The company was a subsidiary of Balkan Mining Pty, a mining company owned by Miloš Bošnjaković, an Australian businessman of Bosnian origin. In March 2013, MM Project obtained mining rights for 116.8 hectares – about 3% of the area eventually covered by the project. In 2017, MM Project (by then renamed Eastern Mining) was acquired by the British-Australian company Adriatic Metals, which shortly afterwards purchased a five-times-larger piece of land (584 hectares) and launched the prospecting stage of the project. The third (and largest) batch of 3,200 hectares was purchased in 2020, complemented by a final acquisition of an

additional 128 hectares in 2022, amounting to a total of around 4,000 hectares. While deforestation and other preparatory work had been underway since 2021, the excavations began in early 2024, and the mine began commercial production in July 2025. The CEO of Adriatic Metals was Paul Cronin, a British former director of a similar mining project in Spain. The company was simultaneously conducting mining operations in Raška, Serbia. In June 2025, Adriatic Metals was acquired by major Canadian mining company Dundee Precious Metals.

The expected quantity of extracted minerals is estimated at 800,000 tonnes per year, predominantly high grade. Adriatic Metals has built a preprocessing plant near the mine producing silver, lead, and zinc concentrates. The preprocessed materials are transported from Vareš to an export harbor in Croatia, after which they are shipped towards European metal smelters in Germany, Scandinavia and other European countries.

Contributions

Dundee/Adriatic Metals plans to invest \$250 million over the course of the mining operations, with operations estimated to last between five and ten years. According to company estimates, the project aims to account for about 2% of the country's GDP. This appears unrealistic, given that the entire mining sector is currently contributing just around 1% of GDP, unless their value-added estimates refer to cumulative output over the full operational period compared with a single year of GDP. The project provides around 300 direct jobs (projected to rise to 700), three quarters of which go to local residents. The company also cites approximately 1,000 indirect jobs supported by it, in hospitality and other services. Two thirds of suppliers – comprising nearly a thousand companies – are national and more than a third are from the Zenica-Doboj canton. One in three employees is female, twice the industry average and three times the national average. Wages are reported to be 54% higher than the industry average, corresponding to approximately \$1,300 per month net. Given that three quarters of workers are younger than 30, the project claims to be helping reduce brain drain – an assertion bolstered by reports that the number of kindergarten pupils in Vareš has multiplied over the past few years.

In addition to the direct contributions of the project, Dundee/Adriatic Metals has invested considerable effort in cultivating a positive image as a socially responsible company. From 2018 to 2023, it donated \$260,000 for community support activities and \$92,000 for infrastructure improvements. These contributions have included a company-funded mining class at the local high school, free English lessons, and dozens of donations to cultural organizations, women's NGOs, sports events, clubs, communities, and scouts, including funding for the expansion of the local kindergarten.

Profits and Criticisms

Each of the four stages of land acquisition described earlier was marred by controversy. Combined with the substantial profits Dundee is projected to generate, this raises serious questions about the net socioeconomic impact of the mine on the local community and the country.

The concession fees paid for land acquisition have been criticized in two respects. First, the initial two land purchases, amounting to a combined one quarter of the total size, were made at a fee of 1,500 Bosnian convertible marks (KM), or \$900 per hectare – approximately one seventh of the generally applied rate for such projects (10,000 KM). This discount is estimated to have cost Bosnian taxpayers five million KM (around \$3 million). Second, the remaining two purchases, including the third (largest) one, were lowered further to 150 KM (\$90) per hectare. This maneuver required an amendment to royalty legislation, successfully lobbied through by Paul Cronin, by self-admission, under which royalties are now charged only during active extraction, on a per-tonne basis. While the per-tonne rate has indeed been raised by almost three times to compensate for the de facto abolition of the lump-sum rate, the new methodology has raised concerns about transparency and foregone revenues.

By its own estimate, Dundee will contribute \$177 million in corporate tax and social contribution payments and \$23 million in royalty payments over the course of the mining operations. However, these contributions are dwarfed by projected post-tax earnings of \$1.06 billion, according to a 2021 feasibility study, which also estimated a breakeven point of only 0.7 years after the start of excavations. If these estimates prove correct, Adriatic Metals will have already recouped its capital investment of \$168 million, supplemented by an additional \$7 million from the European Bank for Reconstruction and Development (EBRD) awarded based on the assessed strategic value of the project.

At the same time, the wages for the workers are likely to be even smaller than both taxes and profits. If the average net wage is – as announced – 54% higher than the industry average, i.e., \$1,300 per month, that is approximately \$1,900 gross, which is \$22,800 per year per worker. If the mine employs 500 workers (assuming an average of the current and projected workforce), that is equal to \$11.4 million total salaries per year. Even if the mine operates for 10 years, this would still amount to only \$110.4 million – a fraction of the company's profits. Even if the number of workers increases to the full 700 projected by the company, the overall picture would not change substantially.

The expected profits are thus likely to dwarf both wages and taxes – \$1 billion of post-tax profits compared with \$200 million government revenues and \$110 million total wages and a few hundred thousand in social contributions. This means that most of the economic value that the mine will create will accrue to the company's owners rather than to the community or the state. In fact, the projected profitability of this project exceeds – by several orders of magnitude – the already-sizeable profitability of the private mining sector in the country.

It is unclear, however, whether the company would have proceeded with the project under less favorable conditions. Mr. Bošnjaković, who exited the project when his company was acquired by Adriatic Metals, and who is otherwise critical of the project in its current form, admits that Adriatic Metals would never have gone forward with the third (largest) stage of land acquisition had no preferential treatment been offered, which would have deprived Vareš of the socioeconomic benefits it has received over the past several years and is expected to receive in the coming years.

JADAR – RIO TINTO

The Jadar mine, which contains battery-grade lithium and borates, would be by far the most expensive mining project in the region, with the highest potential for socioeconomic gains but also the greatest risk of disproportionate profit accumulation amid legal and regulatory confusion. It is also particularly difficult to analyze given the uncertainty of its execution, timeline, and financial structure. As one of the largest FDIs in the region's history, it holds significant potential for local and national fiscal revenue and employment growth. However, the lack of transparency around royalty rates and taxation mechanisms, compounded by the Serbian government's documented governance deficits and poor anti-corruption record have raised concerns about preferential treatment for investors and diminished socioeconomic benefits.

Overview

The Jadar mine is a proposed project for the extraction and processing of lithium and borate in the Jadar Valley, located near the city of Loznica in the western part of Serbia. Rio Tinto, the world's second-largest mining corporation, a British-Australian company, first publicly announced the Jadar idea after discovery and exploration work in the early 2000s, which was later complemented by extensive technical documentation and feasibility studies through 2020–2022. Rio Tinto has targeted battery-grade lithium carbonate production of roughly 55,000–58,000 tonnes per year, comprising an integrated mine, concentrator, and processing complex.

The project footprint defined in the spatial plan and other company materials covers several scales: a central project footprint (surface plant and facilities) of roughly 220–260 hectares, and a broader Special Purpose Area covering about 2,030 hectares when infrastructure corridors and buffer zones are included. The spatial plan was initially adopted in 2020 and revoked in early 2022 after major protests. In the summer of 2024, the Serbian Constitutional Court declared the revocation unconstitutional, and an EU-Serbian strategic partnership was signed shortly afterwards, followed by an EU announcement in June 2025 listing the project among 13 key strategic mining projects outside EU borders boosted the Jadar Mine's prospects. However, given the repeated delays and lack of final approval by national institutions, the execution of the project and its potential start dates remain uncertain, with both the government and the company expressing hopes for an early 2028 construction start date.

Contributions

Since the project is still in its planning stages, any socioeconomic contributions must be considered separately for the construction phase and for eventual operations. While it is difficult to estimate the exact construction time, a 2023 feasibility study commissioned by Rio Tinto projects roughly 1,300 permanent operational jobs directly at the site, with several thousand additional (2,500–3,300) indirect jobs across the wider economy (e.g. supply chain, services, and induced spending). If one considers the 1,300 jobs at the site, and assumes a monthly gross wage of around \$2,000 (slightly above the wage level at the Rupice mine, and above

the average wage in mining in Serbia), that implies a monthly wage bill of \$2.6 million, or \$31.2 million annually.

Overall, the feasibility study estimates a net total economy-wide job uplift of around 4,500 jobs when multipliers are included. Even accepting this generous estimate, it falls far short of the 20,000 jobs pledged by Serbian Parliament Speaker Ana Brnabić earlier this year.

There is much less clarity regarding direct fiscal revenues. The Serbian government typically charges royalties of 5% on annual revenues for metal ores, alongside a standard corporate tax rate of 15%. On this basis, the feasibility study estimates total government receipts (royalties, corporate tax, withholding tax, property tax, and personal income tax) at over \$200 million per year once initial government incentives expire and the project is fully operational. The study breaks these down at approximately \$95 million corporate income tax, \$55 million in royalties, \$28 million in dividend withholding tax, \$5–6 million property tax to Loznica, and additional municipal receipts — with the municipality of Loznica forecast to receive around \$18 million per year, approximately 40% of royalty-based revenues.

In the meantime, however, Rio Tinto has invested considerable effort in improving its significantly damaged reputation in the country amid major public opposition. It has committed to a Jadar Development Fund of approximately \$5.5 million per year for at least 10 years to support local economic development initiatives, alongside commitments to training, local procurement, and community programs.

Profits and Criticisms

Rio Tinto has estimated capital costs in the region of \$2.5–3 billion, based on detailed technical reports describing the deposit and its potential production profile. These would make the project one of the largest one-off FDIs in the history of Serbia and the Western Balkans. About a fifth of these upfront expenses (\$550 million) have reportedly already been incurred for exploration and feasibility studies over the past two decades.

Profit estimates vary widely between Rio Tinto's projections and those of activists or other independent researchers, partly due to different assumptions about lithium prices, which are prone to fluctuation and have recently been declining, and partly due to the opacity of fiscal revenue projections discussed above. Using the feasibility study data – if the corporate tax revenues are \$95 million, with the Serbian corporate tax rate of 15%, this implies that profits before tax are around \$630 million per year, or approximately \$535 million after corporate tax. Alternative estimates by critics of the project question the fiscal revenues, which they place significantly lower, partly under the assumption that value-added processing will occur outside Serbia. If these estimates prove more accurate, this would imply higher annual profits, potentially by another several hundred million dollars.

Overall, the feasibility study commissioned by Rio Tinto indicates gross salaries for workers of around \$30 million per year, government revenues of around \$200 million, social contributions of \$6 million and profits after taxes of \$535 million. In other words, the owners' share would be

twice that remaining in the community through workers' wages and state taxes. This is largely consistent with the current asymmetrical income distribution in the mining sector in Serbia, as well as the profit distribution pattern of the country's largest mines.

LOPARE – ARCORE

The Lopare mine, which contains lithium carbonate, magnesium, potassium, and boron, is currently awaiting permit approval. Significant uncertainty surrounds its feasibility, potential implementation, and applicable royalty fees. The project company, Arcore, has completed discovery work and established a partnership for conversion of extracted materials in Germany. Arcore has indicated a potential investment of several hundred million dollars and the potential creation of several thousand jobs, but concerns about preferential government treatment during the exploration and the permit-application stages have already been raised.

Overview

Arcore is a “junior mining” company, solely dedicated to the exploration and extraction of raw material. It is based in Switzerland but has a same-named subsidiary in Bosnia and Herzegovina and is currently active only on this project. Having acquired the exploration permit in 2018 and completed discovery work by late 2023, it applied for an operations permit in February 2025. The proposed mining area is 25 km² and is located in Republika Srpska, 140 kilometres north of Sarajevo and 24 kilometres from Tuzla. The nearest town, Lopare, has a population of around 3,000.

The discovery work, conducted by the mineral resource consulting company CSA Global, identified reported resources of 1.5 million tonnes of lithium carbonate equivalent (LCE), 14 million tonnes of boron (B₂O₃), 35 million tonnes of potash (KCl), and 94 million tonnes of magnesium sulfate (MgSO₄). The total value of these resources is around \$68 billion at current prices⁸, though it should be noted that this estimate ignores many factors such as recovery rates, processing losses, ore quality and marketability, price volatility, operating costs, infrastructure, and transport needs. Even if all these factors reduce gross revenues to half this figure, the implied resource value would still be around \$30 billion. If the ore is exploited over the announced 50-year operational period, annual gross revenues amount to around \$600 million.

According to Arcore, the minerals are located relatively close to the surface in layers 100-200 metres thick and would be mined by open-pit mining, which is criticized by environmental activists as a very damaging extraction method. The company expects to receive approval to begin the extraction in late 2026. It has already formed a partnership with Rock Tech, a cleantech company with operations in Canada and Germany, whose German facility would process the extracted minerals should the project be approved.

⁸ The price of lithium is approximately \$12,000 per tonne (t), the price of potash is approximately \$350 per t, the price of boron is approximately \$1,000 per t, and magnesium sulfate is \$260 per t. Multiplying the quantities by these prices results in approximately \$68 billion.

Contributions

Since the application for the permit was submitted only recently, little detail is available on the project's potential implementation or its implications for the local community. While there is no formal feasibility study, Arcore has pledged to create around 1,000 jobs directly and 3,000-5,000 jobs indirectly – which appears to be a significant overestimate, given that it exceeds Lopare's entire current population. These figures should be understood in the context of the company's projected 50-year operational period. Assuming 1,000 workers employed in the mine, with a gross salary of \$1,900 per month (assuming the same salary levels as the Rupice mine), that yields an annual wage bill of \$22.8 million, less than 4% of the potential annual gross sales.

As for royalty payments, Bosnia and Herzegovina's laws stipulate that in an "extremely under-developed" area such as the Lopare region, 90% of royalty revenues would accrue directly to the municipality. Arcore has suggested royalties of around \$7 million per year; under this scenario, the \$6.2 million flowing to the municipality would double its total annual budget. In the absence of a feasibility study, remaining contributions are difficult to estimate.

Profits and Criticisms

In the absence of a feasibility study, one approach is to benchmark Lopare against Serbia's Jadar project. Jadar estimates 2.3 million tonnes of lithium carbonate over a projected 40-year mine life; Lopare estimates 1.5 million tonnes over 50 years – placing Lopare at roughly half of Jadar's annual lithium carbonate production. If Jadar is projected to generate net profits of around \$535 million per year according to Rio Tinto's own feasibility study, this would suggest annual profits for the Rupice mine in the range of \$200-300 million – broadly consistent with the earlier estimate of \$600 million in annual gross sales. Applying BiH's corporate income tax rate of 10% to these profit estimates implies a corporate tax liability of approximately \$20-30 million per year.

Comparing projected profits with estimated salaries, royalties and corporate taxes yields a distributional picture similar to – and potentially even more lopsided than – that observed for the other mines examined in this chapter. Projected annual profits of \$200-300 million dwarf the annual wage bill of €23 million, royalties of \$7 million and corporate income of €20-30 million.

Amid the uncertainty around Arcore's contributions, concerns have mounted in Bosnia and Herzegovina, not least due to perceptions about substantially undervalued royalty fees in the largest ongoing mineral extraction project in the country (see section on Rupice – Dundee/Adriatic Metals). While the relevant legislation is set at the entity level – with Lopare under Republika Srpska's jurisdiction and Rupice under the Federation's – both cases share major similarities regarding asserted strategic importance of the minerals, underdeveloped local economies, and the lack of trust in local, entity-level, and national authorities, all of which raise concerns about preferential treatment for Arcore.

These fears only been compounded by the apparent permissive approach authorities have taken toward the company so far. By law, the deadline for submitting the permit application should have been February 2024, that is, two years after the exploration work had begun. Critics argue that the reasons for the one-year postponement by Republika Srpska's Ministry of Energy were political, as the government might have wanted to avoid any public backlash ahead of local elections. In any case, the postponement is seen as having given the company additional time to prepare its application and increase the likelihood of success. Similar criticisms have been raised regarding the exploration work, as Republika Srpska's national assembly amended its relevant laws shortly prior to it. The changes resulted in a 50-fold increase in the permitted extraction volume for metallic minerals and allowing exploration to proceed without clear legal or socioeconomic parameters governing a potential collaboration, while bypassing municipalities in the decision-making process.

Despite the lack of a feasibility study, the available evidence suggests that the socioeconomic profile of the Lopare-Arcore project is likely to resemble that of the previous two cases. The mine is likely to generate substantial profits for its owners, which would substantially exceed wages for its approximately 1,000 workers and modest fiscal revenues for the authorities (relative to the accumulated profit).

BOR – ZIJIN

The Bor mine is a mining-and-smelting complex primarily producing copper and gold located in the small city of Bor (population 41,000) in eastern Serbia. Operational for more than a century, the mine has been owned by the Chinese company Zijin Mining Group since 2018. It is the largest project in the country's sizeable mining sector.

Overview

Mining at Bor is a long-established activity. The first systematic geological exploration in the Bor area began in the late 19th century and the modern mining-and-smelting complex developed through the 20th century under successive owners and subsequently state ownership as Rudarsko-topioničarski basen (RTB) Bor – a household name in former Yugoslavia with tens of thousands of employees at its historical peak in the mid-20th century.

After a period of decline and struggles in the post-socialist transition period, ownership of the complex changed fundamentally in 2018, when Zijin Mining Group was designated as strategic partner and acquired a 63% stake in RTB Bor, ushering in an era of growing Chinese investment in the country. The deal, finalized in late 2018, saw Zijin pledge to invest in the complex, settle its existing debts, and retain local employment levels. The reconstructed and expanded complex re-opened in 2021.

Alongside the acquisition of RTB Bor, Zijin expanded in the same geological district through the Čukaru Peki copper-gold mine, a separate and newer operation located near Bor. The deposit was identified through exploration in the 2010s and later passed through a sequence of

ownership changes before coming under full Zijin control. Čukaru Peki is widely regarded as one of the richest copper–gold deposits in Europe, offering both a high-grade initial mining zone and a much larger deeper resource base supporting production over many years.

According to Zijin’s own published data, Čukaru Peki was the larger of the two by mineral resources, producing more copper and gold in 2024. The total available resources at these two mines amount to around 11.5 million tonnes of copper and 383 tonnes of gold; among them, Čukaru Peki contains 7.5 million tonnes of copper and 250 tonnes of gold.

Contributions, Profits and Criticisms

As both companies have been operating for some time, their financial statements are available. Based on financial statements for 2022, Bor employs far more workers (5,945) than Čukaru Peki (846), although both report similar operating revenues of around \$1 billion. Their cost structures differ sharply: Bor records much higher material costs (\$284 million) and staff costs (\$95 million), whereas Čukaru Peki reports very low material costs (\$38 million) and far lower staff costs (\$20 million). Corporate taxes are modest in both cases – particularly at Čukaru Peki (\$14 million) compared with Bor (\$27 million) – despite Čukaru Peki’s substantially larger profit after tax (\$682 million compared with \$271 million). This disparity is likely attributable to tax exemptions. Overall, while both mines are profitable, Čukaru Peki reveals an even bigger asymmetry between corporate profits and state and wage contributions than in our remaining case studies, while this disparity is considerably lower for Bor.

Zijin has publicly stated its intention to modernize smelting and processing, rather than merely extracting ore, with the aim of capturing more value locally. The post-2018 upgrades were explicitly presented as increasing cathode and refinery output rather than merely exporting raw concentrate – a central element of the bid to national authorities and a feature distinguishing Zijin’s approach from most other major mining projects in the region.

Over the past seven years, Zijin has announced multiple community and social initiatives in Bor. Examples included donations for local infrastructure, such as a reported \$1.2 million donation for a water-supply project in the nearby village of Metovnica, and scholarship and education programs. The latter include a multi-year commitment to the “For a Better Future” education project budgeted in the hundreds of thousands of euros, and several smaller community grants and charitable donations. Revenues at Bor have tripled since 2021, ranging between hundreds of millions and one billion dollars in peak years.

Overall, the lack of reported royalty discounts or other preferential treatment, and the government’s retained one-third stake in the management structure, distinguish Bor from many other major mining projects in the region. However, the considerable profits flowing to Zijin reflect deeper structural and legislative shortcomings that deprive municipal and national budgets of substantial additional revenues.

Table 6 – Overview of the case studies

Mine	Company	Stage	Location	Political context	Main materials	Scope of work
Jadar	Rio Tinto (British-Australian), since initial prospecting in early 2000s	Planned (paused by the company)	Western Serbia	Supported by government, EBRD, and EU (2025 Strategic Partnership)	Lithium	Extraction and processing
Bor	Zijin (Chinese), since 2018	Operational (long-standing)	Eastern Serbia	Supported and co-owned by government	Copper and gold	Extraction and processing (smelting)
Lopar	Arcore (Swiss), since prospecting approval in 2018	Planned (application for operations permit submitted in February 2025)	Bosnia and Herzegovina – Republika Srpska	Tentatively supported by national government; mixed signals from opposition-party mayor	Various CRMs	Extraction
Rupice	Dundee (Canadian), since 2025; Adriatic Metals (British-Australian), 2017-2025	Ongoing (since 2024, prospecting since 2017)	Bosnia and Herzegovina – Federation	Supported by national and local government	Various CRMs	Extraction and pre-processing

Table 7 – Cost-benefit assessment of the case studies

Mine	Capital investment	Revenues	Royalty fees	Tax contributions	Direct job creation	Total wages per year	Net profits	Break-even time
Jadar	\$2.5–3.0 b	≈ \$1.1b/year	≈ \$55m/year	≈ \$145–150m/year	≈ 1,300	≈ €31.2m/	≈ \$535m/	4,7 - 5,7 years
Bor (including Čukaru Peki)	n/a	≈ \$2.0b/year	n/a	≈ \$41.5m/year	6,791	≈ \$114.9m/year	≈ \$953.2–300m/year	n/a
Lopar	\$0.4–0.6 b	≈ \$600m/year	≈ \$7m/year	≈ \$20–30m/year	≈ 1,000	≈ €22.8m/year	≈ \$200–300m/	≈ 2 years
Rupice	\$250 m	n/a	\$23m (total)	\$177m (total)	300–700	≈ €6.8–16.0m/year	\$1.06b (total)	0,7 years

Note: All figures are estimates or projections, except for Bor, where they are drawn from official annual financial statements. Figures for Rupice are shown for the total lifetime of the project in line with the relevant feasibility study.

CONCLUSIONS AND RECOMMENDATIONS

The analysis presented in this chapter shows that the mining sector in the Western Balkans plays a relatively minor role in the region's economies. At the same time, the value added it generates is highly skewed in its distribution. The proverbial canaries in Western Balkan mines sing big disparities, as most of the value generated takes the form of large profits for private – often foreign – companies, while workers and the state retain only a marginal share. This resembles a neo-colonial pattern: natural resources generate very large profits for private investors, but comparatively little for workers, municipalities, and the state, alongside serious concerns about the destruction of nature and the inhabitability of entire regions. Our findings may, if anything, paint too positive a picture. Our estimates do not account for the significant social and environmental costs of large-scale mining projects – from the degradation of land and water to the disruption of agriculture and local livelihoods. These costs are substantial and are largely borne by local communities, which often receive little or no compensation.

At the same time, mining cannot be dismissed entirely. It is an extremely broad sector producing a wide range of materials and must not be reduced to controversial large-scale projects. Despite its capital-intensive nature, mining remains one of the few sources of formal employment in some small towns and remote areas. Moreover, with the expansion of green technologies, global demand for critical raw materials is rising rapidly. The key challenge, therefore, is not whether mining should continue, but how it should be organized and for whose benefit. A different approach is needed – the following measures could help ensure a more balanced distribution of the economic value generated by mining in the Western Balkans.

First, governments should explore more active involvement in mining, including direct public investment, so that a larger share of the value generated is retained by the society. This would represent a fundamental reconsideration of the prevailing model of granting access to natural resources almost exclusively to private – often foreign – companies. Where full public ownership is not feasible, public–private partnerships should be considered, with the state retaining a substantial stake – potentially close to one half – and meaningful decision-making power, such as a golden share. Supporting domestic companies to participate and co-invest in mining projects should also be a policy priority, although this might be difficult for some critical minerals which require niche expertise and track record. At the same time, unprofitable state-owned coal mines, especially in Bosnia and Herzegovina, ought to be gradually phased out as part of a broader decarbonisation strategy and efforts to reduce air pollution. This process should not be abrupt, given their role in the electricity system and in local employment, and should be accompanied by sustained state investment in renewable energy and alternative employment opportunities in more productive sectors.

Second, the fiscal regime governing mining needs to be rebalanced. Royalty rates should be higher and designed to increase in line with commodity prices, with a strong minimum rate.. In addition, governments should consider introducing more progressive taxation, particularly mechanisms that capture windfall profits in periods of exceptionally high returns. If some of

the planned mining projects are as large and economically valuable as investors claim, they could provide an opportunity for the state to capture a larger share of the value generated and use these revenues to support broader structural reform in the Western Balkan countries, helping them move away from their outdated low-tax growth models established during the post-socialist transition.

Third, alternative forms of economic organisation, ownership and management should be considered. Employee and community ownership arrangements deserve particular attention. If local communities held a meaningful stake in new mining projects and shared in the huge profits they are expected to generate, that would not only ensure a fairer distribution of income and wealth, but could also help build broader social support for these projects, particularly in areas most directly affected.

Fourth, specific measures ought to be taken to maximise the domestic value of large-scale mining projects. These include hiring a predominantly domestic workforce but also ensuring that a larger share of the (higher-grade) processing of the minerals, which tends to generate far larger revenues than the raw extraction, is conducted locally.

Fourth, where people are displaced or otherwise adversely affected, adequate and enforceable compensation must be guaranteed. This includes not only one-off payments, but also long-term mechanisms that reflect the permanent loss of land, livelihoods, and environmental quality.

Finally, on top of these policy recommendations, governments should also commission their own cost-benefit studies to enable a more balanced assessment of the socioeconomic implications of these projects, rather than blindly relying on those conducted by the interested companies, which carry the risk of bias and inflated estimates. Independent analysis would also help generate a Laffer curve of company profitability, enabling governments to strategize around how high their proposed royalty rates can go without causing the investors to lose interest – a point almost certainly not reached by the current arrangements documented in the four case studies.

The overall verdict of this chapter is that mining carries some socioeconomic potential for the Western Balkans, but one that current approaches to planned large-scale projects stop far short of realising. Ultimately, while neither the overall size of the mining sector nor the ambition of the four case studies is negligible, mining must not be framed as existential for the future development of Western Balkan economies. Instead, any policy choices in this area must be made holistically and with full consideration of their environmental, political, and other implications, with economic arguments serving as complementary, rather than as a definitive basis for either endorsement or dismissal.

ABOUT THE AUTHORS

Biljana Jovanović is Economist at wiiw with extensive research experience in a wide array of topics, such as monetary policy, economic growth, macroeconomic forecasting, productivity and firm behaviour. Her most recent research is focused on tobacco taxation and determinants of smoking initiation. Previously, she has worked as a researcher and an adviser at the National Bank of the Republic of North Macedonia from 2007 to 2021. She holds a master's degree in economics from the Staffordshire university, Stoke-on-Trent and a Ph.D. in Economics from the Institute of Economics – Skopje.

Kristijan Fidanovski is Economist at wiiw focusing on tobacco taxation in Eastern Europe and the political economies of the Western Balkan countries. He holds a PhD from the University of Oxford's Department of Social Policy, where he examined pronatalist policies and politics in (Eastern) Europe as a Barnett Scholar. His other research interests include population aging, EU integration, and electoral systems; his single- and co-authored work has been published in Nature Communications, Social Policy Administration, and by Routledge, among other places. He has provided consulting services to the European Union, The Economist Intelligence Unit, Oxford Analytica, the United Nations Fund for Population Activities, and the Parliament of South Korea. Kristijan has also written for, appeared on, or been quoted in The Economist, European Voices, Eurozine, New Eastern Europe, Balkan Insight, Oxford Political Review, Quillette, Bloomberg Adria, among other media outlets. He holds an MA and BA in East European Studies from Georgetown University and University College London, respectively, and is a former fellow of the Institute for Human Sciences (IWM) in Vienna as well as a research assistant to Prof. Timothy Garton Ash.

Branimir Jovanović is Economist at wiiw, covering the Western Balkans and serving as a country expert for North Macedonia and Serbia. He works on a broad range of topics, including economic growth and development, inequality and poverty, fiscal policy and taxation, social policies and labour rights, EU integration, and foreign direct investment. From 2017 to 2019, he advised the Minister of Finance of North Macedonia, and from 2007 to 2015, he was a researcher at the National Bank of North Macedonia. He holds a PhD from the University of Rome "Tor Vergata" in Italy and an MSc from Staffordshire University in the UK.

CHAPTER 5

RECASTING THE CIVIL SOCIETY LANDSCAPE: CIVIC MOBILIZATION AGAINST MINING PROJECTS IN THE WESTERN BALKANS

Jelena Vasiljević

INTRODUCTION: ENVIRONMENTAL MOBILIZATION IN CONTEXT

Environmental and anti-mining mobilizations have emerged as one of the most dynamic civic forces in the Western Balkans over the past decade. Although environmental issues were long peripheral to political debates in the region, the rapid expansion of extractive projects – often shaped by opaque decision-making, weak institutional safeguards, and competing geopolitical interests – has triggered an unprecedented wave of citizen engagement. From small, locally grounded initiatives to mass national protests, these mobilizations have begun to reshape the civic landscape, challenging entrenched power structures while revealing new possibilities for democratic participation.

Understanding civil society mobilization against mining in the region is important for several reasons. First, it provides valuable insights into citizens' concerns regarding planned mining projects – how they perceive potential threats, the anticipated impact on their way of life, and their prospects for the future in the affected areas. Although this resistance is predominantly local, emerging in specific locations targeted by mining initiatives, these struggles have expanded to the national level, shaping broader societal debates and forming networks with researchers, academics, and activists across the country. In this way, they articulate concerns that extend beyond narrowly defined local grievances: activism against mining has become a platform for expressing broader social and political positions on these issues, particularly in a context of institutional capture and controlled media, where conventional channels for expressing dissent are constrained.

Second, environmental mobilization has emerged as a significant political factor, particularly in Serbia, where its implications for future processes of democratization should not be overlooked. Mobilization against mining has become an integral component of the year-long protest cycle in Serbia, with the flags of *Ne damo Jadar* – an emblematic movement opposing the mining project in the Jadar Valley – frequently visible in protest marches. It is therefore essential to situate this mobilization within a broader discussion of ongoing struggles over Serbia's political and social future and, by extension, that of the wider region.

A brief historical background is necessary to understand how environmental concerns have transformed civil society in the region and influenced the political landscape through the rise of green political parties, some of which have become parliamentary actors. Until the mid-2010s, environmental issues were not particularly prominent in civil society, and environmental NGOs (eNGOs) rarely challenged official politics. For instance, Fagan and Ejduš wrote¹ about the conspicuous absence of eNGOs from the protests against the notorious Belgrade Waterfront project (BW), despite its well-documented risks related to surface water contami-

¹ Fagan, A., & Ejduš, F. 2022. "Lost at the waterfront? Explaining the absence of green organizations in the Don't let Belgrade D (r) own movement." *Environmental Politics* 31(7): 1289-1308.

nation, flooding, and air pollution. Their conclusion is twofold, pointing to the emerging divide between the “old” and the newly forming civil society – or the divisions “between established NGOs on the one side and grassroots activists on the other”. On the one hand, the eNGOs of the time became increasingly “locked into policy reform processes” and remained cautious toward any “street actions” that could compromise their credibility or eligibility to participate in such reform efforts. On the other hand, the political and ideological framing of the protests against BW made it difficult for established, donor-driven NGOs to join, as the movement embraced a broader ideological critique of neoliberal politics and practices, reflecting growing disenchantment with how NGOs operate and (fail to) address citizens’ grievances.

Opposition to new large-scale investment plans, which threatened to radically transform and commodify public spaces and natural habitats, marked a new phase in civil society struggles across the region. These movements also echoed the global resurgence of interest in protecting the commons and the environment. Right-to-the-city movements in Zagreb and Belgrade, for example, rallied a new generation of green activists opposing “urban megaprojects,”² who later established new green political parties – *Možemo!* (“We Can”) in Croatia and the *Zeleno-levi* front (Green-Left Front) in Serbia. Smaller cities and rural areas have likewise seen a rise in environmental activism with notable mobilization potential, such as protests against waste landfills in rural Montenegro or against air pollution in Tetovo, North Macedonia.

A true turning point in this respect, however, was the pan-regional mobilization against small hydropower plants (SHPs). Again, state-sponsored investment plans provided the backdrop for resistance. As the region committed itself to producing more clean energy, governments began incentivizing hydropower investments. Due to the abundance of fast-flowing mountain rivers ideal for small facilities, investors enthusiastically took advantage of feed-in tariffs. Approximately 3,000 SHPs were planned across the Balkans, including 856 in Serbia. Despite generating clean energy, SHPs have faced criticism for inflicting severe ecological damage by diverting water flows, degrading riverbeds, and disrupting fish migration.³ This prompted activists and local residents to organize some of the most dynamic protests in the region.⁴ Formal and informal organizations – such as the “Brave Women of Kruščica” or “Let’s Defend the Rivers of Stara Planina” – gained international visibility.⁵ Struggles like the one in Štrpce in Kosovo resonated beyond the region as well, especially because of their success in bridging the ethnic divide and uniting Albanians and Serbs in joint opposition.⁶ Over time, these initiatives fostered interregional cooperation and sustained collaboration among civil society organizations across the Western Balkans. In 2021, a regional alliance called “Let’s Defend the Rivers of the Balkans” was formed, uniting environmental activists from Bosnia and Herzegovina,

² Zeković, S., & Maričić, T. 2022. “Contemporary governance of urban mega-projects: a case study of the Belgrade waterfront.” *Territory, Politics, Governance* 10(4): 527-548.

³ <https://riverwatch.eu/en/balkanrivers/news/bankwatch-study-broken-rivers>

⁴ Vasiljević, J. 2020. “Environmental activism in the Balkans: from direct action to political subjectivity.” BiEPAG blog: <https://biepag.eu/environmental-activism-in-the-balkans-from-direct-action-to-political-subjectivity/>.

⁵ <https://www.ern.org/en/goldman-environmental-prize-for-the-brave-women-of-kruscica/>; <https://balkanrivers.net/en/news/award-for-stara-planina-activists>

⁶ <https://prishtinainsight.com/without-water-life-cannot-continue-say-hydropower-protestors/>

Serbia, Montenegro, Croatia, and Kosovo. In late October 2025, the alliance changed its name to “Let’s Defend the Nature of the Balkans,” welcomed new organizations, and expanded to include North Macedonia.

Many of these organizations, along with this same alliance, now form the foundation for mobilization against lithium mining. Connections are particularly strong between activist groups from Bosnia and Herzegovina and Serbia, especially in regions targeted for mining projects. *Ne damo Jadar* from the Jadar valley has become a symbol of resistance to lithium mining, but numerous other organizations interact and cooperate. Their past experiences, established ties, and ongoing collaboration largely shape the dynamics and landscape of civil society mobilization against mining projects in the Western Balkans today.

NATIONAL CONTEXTS AND THE CONTOURS OF ANTI-MINING ACTIVISM

Resistance to mining in Western Balkan countries follows similar patterns but is also shaped by local and, more importantly, national contexts. Dissenting voices are raised primarily over environmental concerns and fears that water, air, and soil will be irreparably contaminated. Motives for mobilization also include the lack of transparency in projects and the exclusion of citizens from consultations and decision-making processes. For these reasons, the local and national political climate matters, as the (non)existence of platforms for dialogue and the exchange of opinions affects the development of citizen organizing.

Montenegro illustrates a case in which local concerns and arguments were recognized and ultimately prevailed over legally questionable procedures. Brskovo, in the municipality of Mojkovac in northeastern Montenegro, holds substantial deposits of zinc, lead, copper, and silver. The Swiss company Tara Resources was granted an exploration and mining concession in 2010, and drilling commenced shortly thereafter. According to the company’s website, the aim was to establish Brskovo as one of Europe’s largest zinc mines. However, the local population expressed serious concerns, not through street protests but via well-attended public debates. Organized citizens argued that the project documentation was riddled with inaccuracies and omissions; they pointed to the Public Health Institute’s findings of high concentrations of heavy metals in the air, water, and soil, which were falsified in the project’s plan. In 2023, the Minister of Energy and Mining formed an interdepartmental commission, which concluded that, due to numerous irregularities and the company’s failure to fulfil its obligations, the contract should be rescinded. Consequently, the concession agreement was terminated – although, in the latest development, Tara Resources has initiated arbitration proceedings against Montenegro.⁷

⁷ <https://montenegrobusiness.eu/montenegro-faces-300-million-arbitration-over-terminated-brskovo-mine-deal/>

In North Macedonia, the triangle comprising civil society, the state, and mining companies' interests has resulted in more ambiguous outcomes. The Strumica valley – a region known for its fertile soil but also for rich deposits of gold and copper – has become a site of contestation. The corporation Euromax Resources was granted a concession in 2012, with a four-year period to meet the conditions necessary for exploitation. The company failed to meet these conditions, but the state revoked the concession only in 2019. In January 2016, however, the company received another concession under the same terms. By 2020, the conditions still had not been fulfilled. Although the deadlines have expired, the Ministry of Economy and the government have not revoked this second concession. In addition to clear breaches of the law – and allegations that the company has ownership ties to local politicians⁸ – civil society has consistently warned that mining operations would seriously damage the environment and compromise the agricultural base of the area. Anti-mining campaigns have highlighted environmental risks associated with cyanidation or leaching with sodium cyanide, the most common gold-processing method. If leaked into soil or groundwater, this substance can cause permanent harm to ecosystems and human health.

Since 2012, at least 80 mining concessions have been granted in North Macedonia, following new legislation introduced by the Gruevski government to boost mining investment. During the autumn 2017 local elections, then-Prime Minister Zoran Zaev assured residents that no mining operations would be established in the region. However, these promises were broken in 2023 when the government approved the merger of two concessions for copper and gold extraction, as requested by Euromax Resources. Massive protests by organizations such as *Zdrava Kotlina* from Strumica and *Eco Dolina* from Novo Selo followed. The government reversed its decision, and Euromax Resources subsequently initiated legal proceedings to challenge this reversal. The company still needs to secure additional permits, including approval of an environmental protection study and a final exploitation permit. The government has indicated that these will not be granted without genuine local consultation and meaningful inclusion of public opinion. Currently, mining in the Strumica area is stalled, local opposition remains strong, and the company has threatened further legal action against the state.

In Bosnia and Herzegovina and Serbia, the relationship between the state and anti-mining civil society appears even more complex and contentious. Both countries are involved in strategic lithium-mining projects, which has placed anti-lithium mobilization at the center of civic resistance, although opposition to other mining initiatives also persists. The following paragraphs outline the broader context and provide an overview, while the subsequent section offers a more in-depth analysis based on fieldwork and focus groups conducted with activists.

In Bosnia and Herzegovina, the case of Lopare illustrates the dynamics of early-stage anti-mining mobilization and the role of information asymmetries in shaping public response. In 2023, local residents became aware of plans to mine lithium in the Majeвица region not through official communication but via activist networks, notably *Karton revolucija* (Cardboard Revolution), a prominent environmental organization based in Tuzla. The fact that exploratory

⁸ <https://www.slobodnaevropa.mk/a/rudnik-ilovica---shtuka-so-vladin-amin-preku-nokj-/32493479.html>

research and drilling had already been underway prior to public disclosure contributed to a strong initial reaction marked by alarm and distrust. In response, local actors established *Čuvari Majevice*, one among a growing number of grassroots environmental initiatives in Bosnia and Herzegovina focused on monitoring lithium-mining developments. Although typically small in scale, these groups benefit from substantial public support and form dense networks of cooperation, which enhance their capacity for mobilization and information-sharing. Their influence is evident in the ability of local opposition to reshape political positioning at the municipal level: in September 2024, the mayors of eight towns and cities, from Lopare to Tuzla, publicly opposed lithium extraction, citing the risk of irreversible environmental and health consequences. The statement by the mayor of Bijeljina, indicating a willingness to resort to civil disobedience, further reflects the politicization of environmental concerns. However, the impact of such local political alignment should be interpreted with caution. Bosnia and Herzegovina's complex, multi-layered administrative system constrains the effective authority of municipal governments, as higher levels of governance retain the capacity to override local decisions. This institutional configuration highlights a key tension between locally grounded resistance and centralized decision-making structures, limiting the extent to which grassroots mobilization can translate into binding policy outcomes.

In Serbia, mining has raised broader public concern since the Chinese Zijin Mining Group took over the large copper mining and smelting complex in Bor in 2018. In April 2021, Zijin was instructed to temporarily halt operations due to failure to comply with environmental standards and was required to establish a wastewater treatment plant. The company has faced protests over its environmental record and its alleged use of opaque agreements to exploit Serbia's more lenient environmental regulations. In the Homolje area, Dundee Precious Metals received a license for exploration and has been operating for nearly two decades. According to the local initiative *Rendžeri istočne Srbije (RIS)*, the company has drilled more than 2,000 wells, resulting in substantial environmental damage, including forest degradation, watercourse pollution, and contamination of drinking and agricultural water sources.

However, the main headlines concerning mining in Serbia have focused on Rio Tinto's Jadar project. Public debate intensified when the Serbian government reinstated plans for lithium mining in the Jadar valley – after cancelling them in 2021 due to massive civic protests. This reversal occurred during German Chancellor Scholz's visit to Serbia, when the EU and Serbia signed the so-called "lithium deal" in the summer of 2024. What sets anti-mining activism in Serbia apart is the extraordinary pressure placed on activists. Those opposing mining face state repression, including blacklisting, detentions, interrogations, and media smear campaigns, in which they are labelled "eco-terrorists." Another distinctive aspect is the scale of mobilization: the fight for the Jadar valley has become a symbol of resistance to corruption and a broader call for the rule of law. A protest in December 2021, when thousands blocked

⁹ On rising mistrust in the EU concerning its transactional and "deal-oriented" approach to the region, see: V. Džihčić, *Mining in the Western Balkans – The Rise of Dangerous Transactionalism*, BiEPAG policy brief, March 2025, <https://www.biepag.eu/publication/mining-in-the-western-balkans-the-rise-of-dangerous-transactionalism>

major roads across Serbia to oppose the Jadar project, was among the largest in Serbia's contemporary history and marked the beginning of a broader wave of mass protests.

Beyond environmental concerns, anti-mining initiatives across the Western Balkans share grievances related to corruption and exclusion from decision-making. While these organizations advocate for clean air, unpolluted water, and biodiversity, they are also raising broader alarms about systemic corruption and demanding greater citizen participation and oversight. They consistently employ similar methods – protests, petitions, legal actions, and awareness campaigns. Their successes and failures vary and appear linked to national contexts: basic freedoms, the rule of law, and institutional independence shape whether meaningful dialogue with the state is possible and whether environmental civil society can effectively influence major national projects. In more authoritarian environments marked by institutional capture and intimidation of the third sector, efforts to contest state flagship projects tend to deepen polarization and societal conflict.

Finally, the geopolitical context surrounding the demand for rare minerals influences civil society's orientation toward internationalization and cooperation with similar movements abroad. To some extent, this also shapes their ideological positioning. Besides regional cooperation and the creation of Balkan-wide networks (as discussed earlier), activists from Bosnia and Herzegovina and Serbia are increasingly forging links with international movements. For example, ZBOR – Združeni balkanski otpor i rad (United Balkan Resistance and Labor) was founded in 2023 in Berlin as a “transnational collective and platform for articulating a united position against the capitalist green transition and all forms of violent extraction.”¹⁰ A year earlier, representatives of nine organizations from Portugal, Germany, Serbia, Chile, and Spain signed the “Jadar Declaration” on international solidarity in struggles against lithium exploitation and for environmental protection.¹¹

INSIDE THE MOVEMENT: PROFILES, MOTIVATIONS, AND STRATEGIES OF ANTI-MINING INITIATIVES

This section provides a more detailed examination of civic initiatives engaged in anti-mining mobilization in Bosnia and Herzegovina and Serbia, particularly in areas targeted for lithium extraction. As these organizations constitute the core infrastructure of anti-mining activism in the Western Balkans, a closer analysis of their narratives – encompassing motivations, strategies, and the conditions under which they operate – offers deeper insight into the dynamics of civil society mobilization against extractive projects in the region.

¹⁰ <https://projekte.berlinergazette.de/workshops/2023/10/06/unworking-balkans/>

¹¹ <https://balkangreenenergynews.com/jadar-declaration-unites-activists-in-global-resistance-against-lithium-mining/>

The accounts presented here are based on focus groups conducted in June 2025 in Tuzla, Bosnia and Herzegovina and Loznica, Serbia. Discussions sought to cover the following topics: motives for organizing, organizational practices and links with the local community, modes of action, relationships with institutions, regional and wider cooperation, and reflection on successes, failures and obstacles. Organizations from Bosnia and Herzegovina that participated include: *Karton revolucija* (Tuzla), *Budimo se ljudi* (Doboj), *Aarhus centar* (Sarajevo), *Čuvari Ozrena* (Doboj), *Eko forum* (Zenica), *Eko put* (Bijeljina), *Fondacija Atelje za društvene promjene* (Sarajevo). Organizations from Serbia include: *Neko brine za Levač* (Levač), *PAKT – Podrinjski antikorupcijski tim* (Loznica), *Koalicija organizacija protiv korupcije u zaštiti životne sredine* (Loznica), *Ne damo Jadar* (Gornje Nedeljice, Loznica), *Suvoborska greda* (Gornji Milanovac), *Rendžeri istočne Srbije* (Petrovac na Mlavi). Twenty activists took part in two focus groups, each lasting about three hours. Although most of the activists had already made public statements and appearances, their comments are treated anonymously here.

These civic initiatives exhibit several distinctive features in terms of their composition, motivations, and modes of action. A notable characteristic is the significant presence of older participants, who in some cases also served as the initial organizers. This pattern cannot be explained solely by the ageing demographic structure of the affected areas, as has been observed in certain environmental movements in Eastern Serbia,¹² but rather reflects a specific form of locally grounded responsibility. Activists in places such as Loznica emphasize that those who have remained are precisely the ones who feel compelled to defend their communities. In Bosnia and Herzegovina, some organizations also include war veterans among their key participants. These individuals bring extensive life experience and a particular understanding of the intersection between political and economic interests. Their engagement is shaped by an awareness that, although local politics continues to rely on nationalist narratives, it is often driven more fundamentally by corruption and clientelistic practices. At the same time, younger people are also actively involved. *Karton revolucija* represents a notable example of a youth-led organization that plays a significant role in linking activists and facilitating coordination across the region.

Most of these organizations emerged spontaneously, often in response to immediate local threats. The majority of activists had no prior experience in civic or political engagement; rather, their involvement was triggered by the discovery of (frequently illegal or opaque) attempts to initiate mining projects. Initial reactions typically took the form of direct, often physical, resistance aimed at preventing the commencement of such activities. These early acts of opposition subsequently facilitated broader mobilization, eventually leading to the formation of more structured organizational forms. In several cases, prior involvement in resistance to small hydropower plant projects served as an important precursor, providing both experiential knowledge and initial mobilization networks.

¹² See: I. Rajković, Whose death, whose eco-revival? *Focaal—Journal of Global and Historical Anthropology* 96 (2023): 71–87, <https://www.berghahnjournals.com/view/journals/focaal/2023/96/fcl960106.xml>.

One of the central themes discussed in relation to the prime motives for engaging in activism is the widespread lack of information among citizens. By and large, citizens were unaware of major mining plans, and activists view this lack of public knowledge as evidence of citizens' exclusion from decision-making processes. Recognizing this exclusion – and the general absence of transparency – was a key motivator for organizing. Activists also regard informing people about the environmental consequences of mining as one of their core responsibilities. One informant, for example, explained how mining could have detrimental effects on an endangered species of bats, and how the potential loss of bat populations would severely damage local ecosystems, yet few citizens understood this.

A particularly important issue they raise is the introduction of new spatial plans, which foresee many exploratory drilling sites and suggest a broader shift towards transforming these countries into mining economies. Many activists described how overwhelming the scale of the unknown is: while the general public now knows about the Jadar project, few realize how many other concessions, exploratory works, and mining plans exist. Because the media are widely perceived as captured or corrupted, these civic initiatives view themselves as the primary channels for informing the public – essentially replacing the media.

Across civic initiatives in Bosnia and Herzegovina, activists consistently emphasize the importance of cooperation across ethnic lines. Collaboration between individuals from different entities and communities is often framed as both necessary and inevitable, given that environmental threats are perceived as shared and indiscriminate. In this sense, local environmental mobilization is frequently presented as one of the most salient instances of cross-ethnic cooperation, standing in contrast to the entrenched dominance of divisive ethno-political narratives. Such mobilization thus not only addresses environmental concerns but also implicitly challenges existing political cleavages. As one activist put it: “We have to unite... not to be Serbs, Bosniaks, Croats... we are the people who oppose the idea of Bosnia and Herzegovina turning into a mine.”

Regional – and increasingly international – cooperation is widely regarded as essential. Activists see themselves as part of a broader network of environmental movements, a trend especially evident among anti-lithium initiatives in Serbia. They participate in regional events and conferences, exchange knowledge, and maintain formal networks. Yet many lament the small number of dedicated activists and wish their movements had more members. Ne damo Jadar from Serbia is viewed as a key partner, particularly given their shared opposition to lithium mining. Activists also place great value on cooperation with expert communities – scientists, lawyers, researchers, and the academic community at large. This cooperation lends their work legitimacy, strengthens advocacy, and increases visibility.

When discussing their relationship with institutions, activists overwhelmingly focus on threats and pressures. In Serbia, institutions are described as “captured” or virtually non-existent. Similar issues arise in Bosnia and Herzegovina, where frequent complaints concern institutional unresponsiveness and the withholding of information. Citizens learn about plans and projects directly from these organizations. As the Rangers of Eastern Serbia's (RIS) website states:

“There is almost no institutional protection in this area, nor is there any effective oversight on the ground. This is why the Rangers exist, as a response to the vacuum left by the services that should be protecting nature but do not perform their role.”

The widely shared perception is that, due to institutional and media capture, these organizations have become substitutes for institutions. Citizens now turn to them for information and assistance; they have lost trust in institutions and fear the authorities. While the fear of protesting or questioning authorities has long been widespread, activists in Serbia now observe that “fear has changed sides,” reflecting sentiments from the country’s wider protest movements. Ultimately, activists across the organizations underline that their goal is to secure reliable and responsive institutions.

Activists consistently highlight the behavior of local politicians, whom they describe as “sheriffs,” acting as if they own everything and bear no responsibility to citizens. They also emphasize the nexus of local war profiteers (from the wars of the 1990s), tycoons, corrupt politicians, and multinational companies. In fact, corruption is often discussed as the single biggest problem (“In essence, it all comes down to corruption”). They stress that the interests of large international companies are not the main issue – corrupt local and national politicians are. They warn that their countries risk becoming new “mining colonies” due to the corruption of local actors. Emphasizing the centrality of the anti-corruption struggle and the call for independent and accountable institutions, activists from Serbia highlight how this narrative and their campaign – which mobilized wider social support – positioned them as the vanguard of a broader student and citizen protest wave (“We mobilized the whole state”).

Pressures and attacks are among the most frequently reported experiences. Activists from Bosnia and Herzegovina report being denied entry to Serbia, being denied Serbian citizenship despite proper documentation, being followed, or experiencing mobile signal outages while in Serbia. SLAPP lawsuits are common. Media targeting is widespread, as are false accusations intended to delegitimize their work or attack their personal careers – sometimes directly from state leaders (“The President himself attacks us in the media”). Activists from Serbia cite instances in which websites and media outlets label them as “eco-terrorists,” including displaying their full names and personal photographs. In Serbia, the media are recognized as a crucial part of the problem due to disinformation, inaccurate reporting, toxic narratives, and direct personal targeting (“the biggest enemy of our society is the media”).

Local governments are often openly hostile or entirely unresponsive. Many activists report feeling personally targeted, and even their families are facing repercussions – for example, one activist whose son was the only local student denied a municipal scholarship. Activists from Fojnica report that their entire community has been punished for opposing small hydropower plants, including the removal of their bus stop.

The issue of trust, consequently, pervades their accounts. Local organizations struggle to identify who genuinely supports them, and widespread institutional mistrust, especially in Serbia, fuels generally low levels of social trust. However, as these initiatives increasingly play a role in

providing accurate information and advocating for the public good, they are gradually earning citizens' trust by effectively substituting for caring institutions.

Relations with international institutions receive mixed assessments. Activists from Bosnia and Herzegovina feel there is little encouragement from the Office of the High Representative (OHR) and little overall interest. Diplomatic pressure is regarded as important, but they remain frustrated by the lack of meaningful inclusion in discussions that affect their communities. They feel strongly about being consulted in various consultations or decision-making processes, resenting the passive role often imposed on them.

In Serbia, disappointment with the West is pronounced, particularly regarding its perceived support for President Vučić and the lithium-related project. Activists often feel compelled to clarify that criticizing Western actors does not make them Russophiles or right-wing, as they are frequently labelled. They also explain that complaints about Chinese mines (e.g., in Bor) are met with understanding in the West, whereas complaints about illegal actions by Western companies conducting exploratory drilling often lead to accusations of anti-Western sentiment. As one activist put it, “Both those from the West and the East see us as prey.”

Their activities are funded through donations and self-funding, with some organizations occasionally taking on project-based work, though their level of professionalization varies. Many prefer to remain cautious about expanding their membership, as they do not trust everyone, even though they value mass participation at events. Some sell merchandise, recognising that citizens want to support and identify with their struggle. Many groups are informal and lack bank accounts, relying on ad hoc donations. Several have turned to advocacy, moving from self-organized protection to more formal CSO work. Yet they also highlight the negative effects of “NGOisation”: while sometimes necessary to secure funds, project work demands administrative time they would rather spend on activism. Consistent with broader findings on local civic initiatives,¹³ they value genuine community support more than donor-dependent financing. Even the largest organizations avoid project-heavy funding structures to preserve their autonomy; *Ne damo Jadar*, for example, relies primarily on citizen donations.

Reflecting on their successes and strengths, activists highlight tangible results, including the ability to mobilize the local community. They take pride – especially younger activists – in “combating the state” online (“This is where we are ahead of them”). They are also proud of their legal strategies, having filed several lawsuits, and express faith in the eventual rule of law despite institutional pressures and current experiences. Above all, they are satisfied with having brought local communities together for the shared benefit. They believe mobilization must begin locally: “If there’s no resistance of the local community, there is nothing.” Yet they also recognize that meaningful success requires national or even regional action.

¹³ See B. Radovanović and J. Vasiljević (2022), Community foundations in Serbia: Bottom-Up Empowerment. The role, challenges, and prospects for the development. Belgrade: Trag Foundation: <https://tragfondacija.org/wp-content/uploads/2022/05/Community-foundations-in-Serbia.pdf>.

Examples of successful mobilization include halting planned logging on Mount Konjuh and, in Serbia, Ne damo Jadar highlights uniting citizens, academia, and the opposition, ultimately preventing the adoption of the spatial plan for Loznica. They take pride in placing environmental protection at the center of public debate and in highlighting corruption as the country's primary issue.

Recent developments suggest that Rio Tinto may be abandoning the Jadar project.¹⁴ Some activists view this as a victory, while others remain cautious, arguing that the risks remain high and the threat persists. They stress that lithium is only part of the problem: broader mining plans across the region – reflected in new laws and spatial strategies – pose a much greater danger. Activists warn of thousands of exploratory boreholes and call for a comprehensive public debate on the future of mining, emphasizing that citizens know almost nothing about these plans.

When asked about the main obstacles, responses focus on politicians, the lack of free media, and the absence of opportunities to publicly debate proponents of mining projects – convinced that they would win public support if such debates were possible. Another obstacle is the sheer number of environmental threats, which makes it difficult, if not impossible, to address them all. Many of these are also linked to corrupt local officials and businessmen, for example, the massive illegal gravel extraction (in the same parts of Bosnia and Herzegovina threatened with lithium mines). However, activists are unable to alert the public to so many different threats and problems occurring simultaneously.

Activists from Serbia identify their president and the current regime as the biggest obstacles. Across both countries, disappointment with the EU is widespread. Many feel that the EU supports criminal political elites and backs environmentally harmful projects. After voicing such criticism, activists are quick to add that they are not anti-Western – a reflection of the stigma they face for opposing EU-backed policies. A wide range of ideological perspectives is present in these movements; nationalism cannot be said to dominate. Their critique is directed at the behavior of international actors rather than rooted in ideological opposition.

CONCLUDING REMARKS

Over the past decade, the Western Balkans have witnessed the emergence of powerful environmental and anti-mining mobilizations that are reshaping the civic landscape. Initially rooted in local grievances over land, water, and community integrity, these movements have evolved into broad coalitions that challenge opaque governance, weak regulatory standards, and the dominance of external investors in the region's development agenda. Their trajectory offers a critical lens for understanding democratic participation, institutional accountability, and the future of civic space.

¹⁴ <https://balkangreenenergynews.com/rio-tinto-halts-lithium-mining-project-jadar-in-serbia/>

These dynamics underscore why environmental and anti-mining movements offer a particularly revealing lens for examining the evolution of civil society in the Western Balkans. They illuminate how citizens mobilize in contexts marked by institutional fragility, how new actors enter the public arena, and how alliances are forged across local, national, and transnational scales. At the same time, they expose the limits of existing participatory mechanisms and the deepening tensions around resource governance, development models, and political accountability. Environmental struggles are simultaneously becoming struggles over democratic practice, rights, and the very contours of civic space in the region.

The insights from the focus groups and direct discussions with activists further reveal a civic landscape shaped by distrust in institutions, lack of political transparency, and endemic corruption. Civic initiatives under scrutiny share a strong sense of local responsibility, a determination to protect their communities, and an understanding that environmental mobilization requires both local rootedness and broader regional alliances. Their experiences show that, in the absence of institutional protection, citizens are stepping into roles that state institutions have failed to fulfil: informing the public, monitoring developments, and mobilizing collective resistance. Despite pressures, smear campaigns, and legal harassment, these groups have achieved notable successes, from stopping harmful local interventions to influencing the wider public debate on corruption and environmental protection. Their activism emerges both as a defensive fight against immediate threats and as a broader call for accountable institutions, transparent governance, and a meaningful rethinking of the region's development path.

Key findings:

1. Environmental mobilization has become a major driver of civic engagement.

Local struggles against lithium mining, in Serbia, have expanded into national movements capable of influencing political debates, shaping public opinion, and mobilizing tens of thousands of citizens.

2. These movements articulate concerns that transcend environmental protection.

They respond to deeper governance deficiencies: lack of transparency in decision-making, elite capture, state–investor collusion, and the erosion of public trust. Environmental questions have therefore become a proxy for broader democratic and socio-economic grievances.

3. A new generation of civil society actors is transforming traditional NGO landscapes.

Grassroots initiatives, informal networks, and place-based movements increasingly set the agenda, often outpacing established NGOs. Their legitimacy stems from local embeddedness and transparent decision-making – qualities often lacking in older donor-dependent organizations.

4. Regional cooperation is strengthening civic capacity.

The pan-Balkan alliance, formed around river protection and now expanded to “Let’s Defend the Nature of the Balkans,” demonstrates growing cross-border solidarity. Activists from WB countries increasingly share strategies, expertise, and monitoring capacities.

5. Lithium and other mining projects are likely to remain flashpoints.

Given high global demand for critical minerals, intensified investor interest, and inadequate environmental governance in the region, mining conflicts will continue to shape civic mobilization and political contestation.

ABOUT THE AUTHOR

Jelena Vasiljević

Senior Research Associate at the Institute for Philosophy and Social Theory, University of Belgrade, and Vice-Chair of its Governing Board. Jelena's academic work focuses on citizenship transformations, civic engagement, solidarity, and memory politics in the post-Yugoslav space. She coordinates the Laboratory for Philanthropy, Solidarity, and Care Studies, and contributes to international research and civil society projects across Europe.

CHAPTER 6

HOW TO COUNTER AUTHORITARIAN EXTRACTION



Vedran Džihic, Marko Kmezić



As the European Union accelerates its green and digital transitions, demand for critical raw materials has increased sharply. The Western Balkan candidate countries, particularly Serbia, Bosnia and Herzegovina, North Macedonia and Montenegro, have emerged as strategically important sites for lithium, copper, and other mineral extraction. For the EU, mining in the region offers an opportunity to strengthen supply chain resilience and advance strategic autonomy. For Western Balkan governments, it promises foreign investment, fiscal revenues, and closer economic integration with the EU.

However, extractive expansion has generated considerable political and social contestation. Local communities and civil society actors have raised concerns about environmental degradation, weak regulatory enforcement, limited transparency in concession agreements, and insufficient public participation in decision-making. These tensions risk undermining both environmental standards and public trust in EU enlargement.

The main conclusions of this policy study show, first, that mining expansion in the Western Balkans is being aggressively promoted as a strategic economic opportunity, especially in the context of the EU's green transition, but it is unfolding within weak, fragmented, and inconsistently enforced governance systems that are not capable of ensuring environmental protection, rule of law, or democratic accountability. Regulatory frameworks are structurally fragile, whereas mining laws allow broad discretion in concessions, expropriation, and contract terms, often privileging private investors over public interest. Spatial planning is outdated or project-specific, enabling ad hoc approvals rather than long-term territorial governance. The case of the Bor region illustrates serious pollution and health consequences, alongside weak monitoring and lack of effective oversight, while the example of the Jadar lithium project shows how authorities accepted partial assessments that excluded core environmental impacts, reducing safeguards to procedural formalities. Mining expansion is thus a governance test: it exposes whether states can align extractive development with environmental protection, human rights, public participation, and rule of law. Without deep institutional reform, expanded mining risks entrenching environmental degradation and further weakening democratic accountability. We argue that the EU needs to take a more proactive approach.

Second, mining in the Western Balkans has a limited overall economic importance but generates very high and highly concentrated profits, with most of the value accruing to private, mostly foreign, owners rather than to workers, local communities, or the state. Case studies, such as Rupice, Bor, the Jadar lithium project, and Lopare, confirm the pattern, as they all are projected to yield enormous private returns, with short breakeven periods and comparatively modest public revenues through taxes and royalties. Put simply, the sector functions as a capital-intensive enclave that integrates into global commodity chains but has weak linkages to broader domestic development and contributes little to long-term structural transformation. From the perspective of domestic public benefit, it is crucial to reconsider how mining is regulated and how the value it generates is distributed, especially given that environmental and social costs are not even included in the financial calculations presented in this study.

Third, anti-mining mobilization in the Western Balkans represents a profound civic transformation, where environmental resistance has become a vehicle for democratic renewal and a challenge to entrenched systems of political and economic power. However, in contexts like Serbia and partly in Bosnia and Herzegovina, repression, surveillance, and smear campaigns show that anti-mining activism has become politically threatening to ruling elites. Environmental issues thus act as entry points into broader challenges to authoritarian governance. The struggle is therefore about governance, not just mining. While lithium and other critical raw materials are immediate triggers, the deeper issue concerns who decides on development, whose interests are prioritized, and whether institutions function transparently and accountably. The decisive factors shaping mining conflicts are domestic: weak institutions, environmental mistrust, democratic backsliding, and limited public participation. Geopolitical competition amplifies stakes but does not explain resistance.

To conclude, this study argues that mining governance constitutes a critical test of enlargement credibility. If extractive projects proceed without robust safeguards, they may reinforce perceptions of unequal integration and externalized environmental risk. Conversely, strengthening environmental enforcement, transparency, and participatory mechanisms could position mining governance as a model for rule of law consolidation and sustainable development under EU accession. In other words, if the EU prioritizes securing raw materials without firmly linking critical raw materials policy to enlargement conditionality and rule of law reforms, it risks undermining its own democratic standards in the region.

Critical raw materials mining in the Western Balkans is therefore not peripheral; it lies at the heart of enlargement's political legitimacy. If refined according to the following set of policy recommendations, critical raw materials mining could serve as both a practical and symbolic anchor for the fading legitimacy of the EU enlargement project:

Link EU enlargement policies and the Critical Raw Materials Act

1. Align EU enlargement policy with the Critical Raw Materials Act by explicitly integrating the environmental and rule-of-law *acquis* into the framework governing strategic projects.

This task necessitates direct channels of communication and joint undertaking by EC Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW), Directorate-General for Trade (DG TRADE), Directorate-General for Environment (DG ENV), and Directorate-General for Neighbourhood and Enlargement Negotiations (DG NEAR). The implementation of the Critical Raw Materials Act should be formally coordinated with the EU enlargement process to ensure that strategic raw materials projects in accession countries comply with the EU's environmental and rule-of-law *acquis*. This alignment would generate institutional synergies between enlargement policy and the Critical Raw Materials Act, preventing regulatory inconsistencies whereby strategic imperatives could otherwise undermine accession standards. Embedding *acquis* compliance from the outset would enhance

legal certainty, reduce political risk, and strengthen the long-term sustainability and legitimacy of critical raw materials projects in candidate countries.

2. Introduce robust governance safeguards, environmental conditionality, and mandatory public consultation requirements for CRMA-designated strategic projects.

All strategic critical raw materials projects—particularly those located in accession countries—should be subject to clear governance benchmarks, strict environmental conditionality, and transparent public consultation procedures. While the application of higher standards may initially extend project timelines, it would ultimately reduce political leverage exercised by individual governments, reinforce EU oversight, and prevent strategic projects from distorting or bypassing accession requirements. Such safeguards would protect the integrity of the enlargement process while ensuring that strategic autonomy objectives remain consistent with EU values and regulatory principles.

Address governance gaps and state capacity limitations

3. Establish institutional safeguards and independent monitoring mechanisms to ensure compliance with the EU environmental and rule-of-law *acquis*.

Given state capture and autocratization in several countries of the Western Balkans, monitoring mechanisms and other safeguards are needed as governments are unable and/or unwilling to monitor the extraction of CRMs. Under these conditions, reliance solely on national authorities is insufficient to safeguard EU standards. Inclusive and robust monitoring regimes are the only way to secure citizen support.

4. Strengthen and enforce EU environmental and participation standards beyond formal alignment.

EU bodies should move beyond a box-ticking approach to *acquis* alignment and ensure that Aarhus Convention principles (access to information, public participation, access to justice) are substantively applied in practice, including during early exploration phases.

5. Environmental protection must be substantially strengthened.

Without strict standards, independent monitoring, and credible enforcement, mining risks causing irreversible harm that far outweighs its limited economic benefits.

6. A multi-level governance framework.

Involve critical raw materials beneficiaries like automakers and battery manufacturers in a shared responsibility framework—EU institutions, national governments, local communities, and industry all have aligned incentives to ensure environmental and social standards are met.

7. Public-private partnerships (PPP).

The EU must commit considerable additional financial resources to support citizens and communities where critical raw materials are extracted. These regions bear the environmental, social, and economic costs of supplying resources essential to Europe's green transition. Targeted funding for local development, environmental restoration, and capacity-building is not charity; it is a strategic investment in resilient, sustainable, and responsible supply chains. EU institutions can facilitate co-financing of independent monitoring programs where industry shares costs in exchange for verified sustainable sourcing. By ensuring that communities benefit fairly, the EU can uphold its climate goals while securing long-term stability and cooperation with partner countries.

8. Provide targeted support to start-ups working on the recovery of **secondary raw materials** and develop an EU-wide classification framework to facilitate their use.

Institutionalize public participation.

9. The EU should strengthen trust and accountability in its engagement with Western Balkan societies by institutionalizing **formal consultation mechanisms with local communities, grassroots initiatives, and civil society organizations**. Rather than relying primarily on dialogue with central governments and investors, EU institutions should recognize affected communities as legitimate stakeholders and involve them directly in discussions related to EU-supported projects and investments. Such engagement should also create room for **addressing concerns about perceived EU double standards**, including criticism that Western-backed companies benefit from regulatory leniency or political protection. By openly engaging with these concerns and incorporating local perspectives into decision-making processes, the EU can enhance transparency, rebuild public trust, and strengthen support for EU integration in the region.

10. All contracts, approvals, independent monitoring results, EIAs, and pollution assessments must be publicly available in accessible formats. **Full transparency** should be ensured in the implementation of MoUs in the field of CRMs, including publication of the roadmap and outcomes from institutional mechanisms and working bodies implementing the Memorandum. Transparency of implementation must become the standard, not the exception, especially in the context of projects with high risks for society and the environment.

Ensure equitable and sustainable resource governance.

11. Firstly, the prevailing model of granting access to natural resources almost exclusively to private – often foreign – companies must be fundamentally reconsidered. **Governments should pursue more active involvement in mining**, including direct public investment,

rather than allowing the bulk of profits to accrue to private owners. Where full public ownership is unrealistic or infeasible, public–private partnerships should be considered, with the state retaining a substantial stake and meaningful decision-making power. Supporting domestic companies to participate in and co-invest in mining projects should also be a policy priority. Special attention must be paid to recycling, particularly the recovery of materials from mining waste, which would also contribute to environmental recovery.

12. Secondly, the **fiscal regime governing mining needs to be rebalanced**. Royalty rates should be higher and designed to increase automatically when commodity prices and profitability rise. In addition, governments should consider introducing more progressive taxation, particularly mechanisms that capture windfall profits in periods of exceptionally high returns.

13. Thirdly, models **of employee and community ownership should be considered** alongside these options. Such arrangements could ensure a fairer distribution of income and help build broader social support for mining projects, especially in areas most directly affected, while offering new employment and training opportunities.

14. Fourthly, where people are displaced or otherwise adversely affected as in the case of mining in Bor in Serbia, **adequate and enforceable compensation must be guaranteed**. This includes not only one-off payments, but also long-term mechanisms that reflect the permanent loss of land, livelihoods, and environmental quality.

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ABOUT THE AUTHORS

Vedran Džihic is a Senior Researcher at the Austrian Institute for International Affairs, Co-Director of the Center for Advanced Studies Southeast Europe at the University of Rijeka, a Lecturer at the University of Vienna, and a Balkans in Europe Policy Advisory Group (BiEPAG) member.

Marko Kmezić is a Lecturer and Senior Researcher at the Centre for Southeast European Studies at the University of Graz and a BiEPAG coordinator.

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The Balkans in Europe Policy Advisory Group (BiEPAG) is a group of policy analysts, scholars, and researchers established as a joint initiative of the European Fund for the Balkans and the Centre for Southeast European Studies at the University of Graz. It works to advance the European integration of the Western Balkans and to support the development of democratic, open, and resilient societies across the region. BiEPAG brings together leading experts from the Western Balkans and across Europe, recognised for their expertise and in-depth understanding of the region and the political, economic, and social processes shaping its future.

BiEPAG members are: Bojan Baća, Odeta Barbullushi, Dimitar Bechev, Florian Bieber (BiEPAG Coordinator), Nikola Burazer, Milica Delević, Nikola Dimitrov, Vedran Džihic, Donika Emini, Giorgio Fruscione, Richard Grieveson, Damir Kapidžić, Marko Kmezić (BiEPAG Assistant Coordinator), Jovana Marović, Lura Pollozhani, Tena Prelec, Frauke M. Seebass, Corina Stratulat, Marta Szpala, Nikolaos Tzifakis, Marina Vulović, Jelena Vasiljević, Gjergji Vurmo.

 www.biepag.eu

 Contact: **SAMIR BEHARIĆ**, Programme Manager

 samir.beharic@balkanfund.org

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 www.balkanfund.org 

 Contact: **VETON ZEKOLLI**, Executive Director

 veton.zekolli@balkanfund.org

The Centre for Southeast European Studies was established in November 2008, following the designation of Southeast Europe as a strategic priority at the University of Graz in 2000. It is an interdisciplinary, cross-faculty institution dedicated to research and education, providing a platform for the university's diverse teaching and research activities on Southeast Europe, while fostering interdisciplinary collaboration.

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 www.suedosteuropa.uni-graz.at/en/

 Contact: **UNIV.PROF. DR. FLORIAN BIEBER**, Professor of Southeast European History and Politics

 florian.bieber@uni-graz.at