**OECD - DG-Reform TSI 10 EU Regions Project**

**Takeaways of the OECD mission to Central Greece**

**Introduction**

OECD team visited Central Greece during 12-15 February 2024, holding more than fifteen meetings with national, regional and local representatives, workers, mining association and companies as well as universities. The peer reviewers to the mission were Manuel Vasquez from Andalusia region (Spain) and Leena Suopajärvi from Lapland region (Finland). A main policy focus for the region is improving the information and social perception about moder mining.

**Current state:**

The region boasts the EU's largest production and refining of Bauxite, vital for Aluminium. While historically significant and relevant to provide job opportunities in remote municipalities, economically available deposits are shrinking, necessitating technological upgrades to locate new deposits and extract minerals from tailings.

While the national government is starting to take actions to improve coordination for mining permitting, there is incipient involvement of regions and municipalities in the strategic decision for mining . A national mineral strategy, including measures to rehabilitate abandoned mines or support circular practices in mining, will help enhance sustainable mineral supply in the country and improve the benefits of this activity in the region.

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| Strengths | Bottlenecks |
| Key European producer of bauxite and aluminium | Lack of national mineral strategy or promotion plan to attract investment in mining for exploration or operation |
| Positive social perception on existing mining projects | Complex and slow permitting process, for exploration, new projects and even extension of active mines- |
| Social responsibility actions by the main mining company in the region, including forest management, and training. | Lack of promotion of the benefits of the sector has led the installation of anti-mining narrative coming form the main cities. |
| Strong technical university ecosystem in Athens, piloting practical innovation projects on circular economy for the mining sector in Central Greece | Lack of collaboration between regional universities and professional education with mining companies. |
| Port Infrastructure and mining companies with potential to innovate. | Cost of energy for mining and metallurgy sector (Fossil fuel based). |

**Key takeaways**

* Technological investment is needed to extend the lifespan of Bauxite supply, to support greater investments for deeper reserves.
* Production of ferronickel, aluminum, and gallium as byproducts from waste in mining and refining processes can extend mineral supply relevance in the region. Yet, it needs additional funding for innovative processing technologies to ensure economic viability.

**Labour market:**

* A coordinated promotion of the benefits of working in the sector, stability, and relatively higher salaries is needed, especially given the growing difficulties in attracting workers due to the structural depopulation of rural areas and outdated perceptions of mining work, along with unclear knowledge about the relative salary benefits. This is particularly crucial amidst the increasing interest in working in tourism, despite its seasonality.

**Permitting and Strategy:**

* A long-term national mineral strategy with a promotion campaign is needed to attract investment and create better conditions for innovative and sustainable mining process.
* The permitting process in mining is unclear and slow, lacking timeframes for approvals. The shortage of skilled staff to analyse permits and Environmental Impact Assessments, along with the absence of a formal coordinator role, are two main bottlenecks. Establishing a single contact point with a standardized and digitized permitting procedure can help address the issue.

**Social perception and community impact:**

* Mining is historically and culturally significant in many towns of Central Greece, leading to local recognition of its importance.
* Better involvement of municipalities in decision-making for mining projects will help improve social perception. Currently, municipalities can provide opinions, but these are not determinative. Additionally, decisions on benefit-sharing agreements in new projects are made at the national level, without clarity for municipal participation.
* Improvement of staff for environmental monitoring of mining operations and at the Institute of Geology & Mineral Exploration for information dissemination regarding mining processes is necessary.
* The regional government must adopt a more proactive role in improving information sharing about mining with local communities. This includes communicating the economic and social benefits of projects, as well as the mechanisms to address environmental impacts.
* Rehabilitation of abandon mine that are under national government responsibility needs to be addressed, as it impacts social perception and opportunities for municipalities to reuse the land.

**Knowledge production (universities, skills, and innovation):**

* There are opportunities at the tertiary level for technical mining qualifications (engineering etc), yet limited programs at the apprentice level for operational roles.
* Formal collaboration with primary and secondary school to explain the relevance of minerals and modern mining can help trigger students around mining sector. There are siloed approaches to better explain the relevance of minerals in the country, e.g. a top-class museum by the Institute of Geology & Mineral Exploration.

**Good practices:**

**ESG**

* Mytilineos Metals rehabilitation of old mine sites into tourism areas such as historical sites and lakes for forest management.
* Mytilineos Metals Engineers in Action program to attract and skill young engineers from across Greece.

**Government’s information action**

* Institute of Geology & Mineral Exploration trust building exercises with local communities including holding regional level consultation to address local concerns.
* Hellenic Geological Surveyminerals museum to educate young people on metals and minerals and spark interest in the sector.

**The role of University**

* **National Technical University of Athens** piloting bottom-up innovation projects to involve stakeholders at the grassroots level in innovating for the mining sector.

**Region and local governments**

* **Regional Government of Fokida** purchased historical buildings to reuse as a museum to attract tourism to the area.