



Regional Cooperation Council



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# ***Common Regional Market Report on Implementation for 2021***



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\*This designation is without prejudice to positions on status and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence

# Abbreviations

**AEOs** - Authorised Economic Operators

**AI** - Artificial Intelligence

**AMA** - Audiovisual Media Authority

**AP 6** - Additional Protocol 6

**BCOs** - Broadband Competence Offices

**BCPs\CCPs** - Border/Common Crossing Points

**BIT** - Bilateral Investment Treaty

**BPA** - Business Process Analysis

**CABs** - Conformity Assessment Body

**CEFTA** - Central European Free Trade Agreement

**CEFTA JC** - CEFTA Joint Committee

**CIF** - Chamber Investment Forum

**CoM B&H** - Council of Ministers of Bosnia and Herzegovina

**CRM** - Common Regional Market

**CRM AP** - Common Regional Market Action Plan

**CRP** - Common Risk Profile

**CSIRT** - Cyber Security Incidents Response Teams

**DESI** - Digital Economy and Society Index

**DG MOVE** - Directorate-General for Mobility and Transport

**DG NEAR** - Directorate-General for Neighbourhood and Enlargement Negotiations

**DG TAXUD** - Directorate-General for Taxation and Customs Union

**DiH** - Digital Innovation Hubs

**DSM** - Dispute Resolution System

**EBRD** - European Bank for Reconstruction and Development

**EC** - European Commission

**EEA** - European Economic Area

**EECC** - European Electronic Communications Code

**EFTA** - European Free Trade Association

**eID** - Electronic Identification

**eIDAS** - Electronic Identification, Authentication and Trust Services

**EIP** - Economic and Investment Plan

**ENISA** - European Union Agency for Cybersecurity

**ETIS** - European Tourism Indicator System

**EU** - European Union

**EUMS** - European Union Member States

**EUIPO** - EU Intellectual Property Office

**FDI** - Foreign Direct Investment

**FESA** - Forum of European Supervisory Authority

**FINNO** - Access2Finance and Innovation Platform

**GCST** - Green Innovation Strategy

**GDP** - Gross Domestic Product

**GDPR** - General Data Protection Regulation

**GIZ** - German Agency for International Cooperation

**GSB** - Government Services Bus

**HEIs** - Higher Education Institutions

**HPC** - High Performance Computing

**HPDA** - High-performance Data Analytics

**ICT** - Information and Communications Technology

**IDP** - Internally Displaced Person

**IFC** - International Finance Corporation

**IPR** - Intellectual Property Right

**ISDS** - Investor-state Dispute Settlement

**IT** - Information Technology

**ITU** - International Telecommunication Union

**JBCP** - Joint Border Crossing Point

**JCA**s - Joint Customs Actions

**KICs** - Knowledge and Innovation Communities

**KODE** - Kosovo\* Digital Economy

**KREN** - Research and Education Network

**MADB** - Market Access Database

**MIET** - Ministry of Industry, Entrepreneurship and Trade

**MoFTER BiH** - Ministry of Foreign Trade and Economic Relations of Bosnia and Herzegovina

**MoU** - Memorandum of Understanding

**MRPs** - Mutual Recognition Programmes

**MSME** - Ministry of Micro, Small and Medium Enterprises

**NAECCS** - National Authority on Electronic Certification and Cyber Security

**NBCO** - National Broadband Competence Office

**NCPs** - National Contact Points

**NIS** - Network and Information Systems

**NPDL** - National Platform for Digital Learning

**NTBs** - Non-tariff Barriers to Trade

**OECD** - Organisation for Economic Cooperation and Development

**PARCO** - Public Administration Reform Coordinator's Office

**PEM** - Pan Euro-Mediterranean

**PSPs** - Payment Service Providers

**RCC** - Regional Cooperation Council

**RIA** - Regional Innovation Area

**RLAH** - Roam Like At Home

**RRA** - Regional Roaming Agreement

**SEED +** - System of Electronic Exchange of Data

**SEPA** - Single Euro Payment Area

**SMEs** - Small and Medium-sized Enterprises

**STEM** - Science, Technology, Engineering, and Mathematics

**TCT** - Transport Community Treaty

**TEG** - Tourism Expert Group

**TFA** - Trade Facilitation Agreement

**TFC** - Trade Facilitation Committees

**TF-CSIRT** - Task Force on Computer Security Incident Response Teams

**TRS** - Time Release Study

**UCS** - Uprava Carina Republike Srbije (The Republic of Serbia Customs Administration)

**UN** - United Nations

**UNCTRAL** - United Nations Commission on International Trade Law

**UNDP** - United Nations Development Program

**UNECE** - United Nations Economic Commission for Europe

**UNMIK** - United Nations Mission in Kosovo\*

**USAID** - United States Agency for International Development

**VET** - Vocational Education and Training

**WB** - Western Balkans

**WBIF** - Western Balkans Investment Framework

**WBTC** - Western Balkans Tourism Crisis Committee

**WCO** - World Customs Organisation

**WE** - Women Entrepreneurs

**WEE** - Women Economic Empowerment

**WG** - Working Group

**WTO** - World Trade Organisation

**WTTC** - World Travel & Tourism Council

# Key achievements in CRM - Regional level

## 1.1 Introduction

The Western Balkans (WB) leaders endorsed the Common Regional Market (CRM) 2021-2024 agenda at the Western Balkans Sofia Summit in November 2020. Being firmly anchored in EU recovery efforts, the CRM agenda aims at reducing the gaps with the EU Single Market and diversifying supplies to create jobs and offer greater choice at lower prices, and at enabling people to work throughout the region. The CRM agenda will likewise be critical in increasing the attractiveness and competitiveness of the region for investment. It will help the region to speed up recovery from the COVID-19 pandemic, attract investors looking for diversification of supply and shorter value chains, and maximise the benefits of the infrastructure investments under the EU Economic and Investment Plan for the Western Balkans.

In July 2021, at the Berlin Process Summit, the WB leaders and EU representatives concluded that successful core elements of cooperation are to be continued and further developed.<sup>1</sup> These elements included activities for the development of CRM, among other. Participants noted that CRM is a decisive endeavour in terms of building back better WB in the post-COVID-19 context and preparing opportunities for further integration of the region with the EU Single Market. In the EU-Western Balkans Summit in Brdo pri Kranju, held in October

2021, participants reiterated the need to deliver on their commitment to establish CRM.<sup>2</sup>

This report provides an overview of both regional and the achievements accomplished at the level of each Western Balkan economy per key CRM policy areas, namely Regional Trade Area (including EU Four Freedoms), Regional Digital Area, Regional Investment Area, Regional Industrial and Innovation Area. The overview of key results in the regional area was drafted by RCC and CEFTA Secretariats, each of them being in charge of their respective areas of expertise, whereas Transport Community Secretariat and WB6 Chamber Investment Forum (CIF) contributed to the regional overview with their inputs in their respective areas of expertise. Taking into consideration the regional ownership of the CRM agenda, this report also includes the contributions from the region's economies, particularly in the Section II of the report Key Achievements in CRM – Economy Level.<sup>3</sup> The report covers the period from December 2020 – November 2021.

## 1.2 Background

Economic growth in the Western Balkans is expected to reach 6.4% in 2021 and 4% in 2022, with faster rates of recovery than initially forecasted due to rising industrial production and exports to

<sup>1</sup> Berlin Summit, 2021, available at <https://www.bundesregierung.de/resource/blob/992814/1939778/34c78ddbfdddb3701635b-1be6751816/2021-07-05-westbalkan-1-data.pdf?download=1>

<sup>2</sup> Brdo Declaration, 2021, available at: [https://www.consilium.europa.eu//media/52280/brdo-declaration-6-october-2021-en.pdf?utm\\_source=dsms-auto&utm\\_medium=email&utm\\_campaign=Brdo+Declaration%2c+6+October+2021](https://www.consilium.europa.eu//media/52280/brdo-declaration-6-october-2021-en.pdf?utm_source=dsms-auto&utm_medium=email&utm_campaign=Brdo+Declaration%2c+6+October+2021)

<sup>3</sup> Economy-related inputs in some CRM policy areas are still pending and upon their receipt, the report will be updated.

the EU, and a strong rebound in the hospitality sector over the summer months.<sup>4</sup> Despite high growth rates, regional employment rate (age 15 and older) on a four-quarter rolling basis remained largely the same in June 2021 at 45%, compared to 2020.<sup>5</sup> While the labour market started rebounding in late 2020, in line with growth recovery, it remains fragile given the renewed pandemic waves and the gradual withdrawal of government support measures. Trade in goods in CEFTA in 2020 declined by 9.22% and was at the level of 4.9 billion EUR, while exports to EU and the world declined by 10.11% and 6.02% respectively<sup>6</sup>. In 2020, trade with the EU was at the level of 16.2 billion EUR, 33.4 billion EUR with the world. The trade of the EU also recorded significant falls for both exports (-9.4%) and imports (-11.6%)<sup>7</sup>. In the same period, global trade declined by 5.3% in 2020<sup>8</sup>.

Even though FDI collapsed globally in 2020, falling by 42%, FDI in the Western Balkan region decreased by 15% only, namely from 6.348 mil EUR in 2019 to 5.350 mil EUR in 2020, which is much better than the small transitional European and EU countries, which suffered 43 % and 73 % decline in FDI inflows, respectively. The region saw significant upward revisions to the 2021 forecasts reflecting better-than-expected outturns in the first half of the year, including in the tourism sector, as well as strong export demand from the EU market.<sup>9</sup>

The COVID-19 crisis has had a severe negative impact on the tourism sector in all WB. A huge fall in tourist arrivals (nearly 60% on average) and overnight stays (54.7% on average) in 2020 reduced tourism revenue and exports, lessened the con-

tribution of tourism to total GDP, and endangered many jobs in SMEs in the region. Despite the significant recovery during 2021, the crisis revealed gaps and challenges in tourism development which are more or less similar for all WB economies (especially in those dependent on tourism); therefore, reinforcing regional co-operation to address these challenges could help each economy to overcome them more efficiently.

## 1.3 Targeted Actions under CRM Four Key Areas

The following sections provide a summary of key achievements along CRM policy areas, namely Regional Trade area, Regional Investment area, Regional Digital area, and Regional Innovation and Industrial area. The focus is placed on result-oriented measures that were accomplished at the regional level in the course of 2021.

### 1.3.1 Regional Trade Area

**Extension of Green Lanes to the EU member states** has been one of the key priorities of the Transport Community and CEFTA in 2021. Agreement in principle was reached with Italy, Greece and Bulgaria to start piloting for ports of Albania, Montenegro, and Italy, for road BCP between Greece and Albania, and Greece and North Macedonia, as well as for road BCPs between Bulgaria and North Macedonia. Concepts and technical notes have been prepared and agreed between

4 European Bank for Reconstruction and Development (EBRD) 2021, Regional Economic Prospects: Bittersweet Recovery, available at <https://www.ebrd.com/cs/Satellite?c=Content&cid=1395301907147&d=&pagename=EBRD%2FContent%2FDownloadDocument>

5 World Bank Group, Western Balkans Regular Economic Report: Greening the Recovery, 2021, <https://openknowledge.worldbank.org/bitstream/handle/10986/36402/Greening-the-Recovery.pdf?sequence=1&isAllowed=y>

6 Vienna Institute for International Studies, available at Recovery Beating Expectations (publication) (wiiw.ac.at)

7 Eurostat, EU trade in goods strongly impacted by the COVID-19 pandemic in 2020, 2021, available at <https://ec.europa.eu/eurostat/web/products-eurostat-news/-/ddn-20210325-1>

8 World Trade Organisation (WTO), Annual Report 2021, available at <https://ec.europa.eu/eurostat/web/products-eurostat-news/-/ddn-20210325-1>

9 European Bank for Reconstruction and Development (EBRD) 2021, Regional Economic Prospects: Bittersweet Recovery, available at <https://www.ebrd.com/cs/Satellite?c=Content&cid=1395301907147&d=&pagename=EBRD%2FContent%2FDownloadDocument>

the parties involved. Data from the CEFTA side are ready to be shared with the EU MS. Draft Memorandum of Understanding (MoU) which should provide the legal basis for data exchange between the CEFTA Parties and EU MS has been prepared and shared with the Parties and relevant DGs. However, it should be pointed out that there are complex issues with regard to systematic data exchange and GDPR pending, and the active involvement of all participating agencies, including EU MS Customs, DG TAXUD, DG NEAR and DG MOVE whose role will be decisive for the success of this piloting.

**Green Corridors/Lanes have been extended to all CEFTA BCPs/CCPs**, providing the agencies (customs, phytosanitary, veterinary and food inspections) involved in the clearance of goods with pre-arrival information on consignments of essential goods, so that the agencies can prepare and that those consignments can be given priority passage. The initiative has also been extended to rail intra-CEFTA BCPs/CCPs: Prijepolje – Bijelo Polje (between Serbia and Montenegro) and Tuzi - Bajze (Montenegro-Albania) and, most recently, on 14 October 2021 Presevo - Tabanovce (Serbia-North Macedonia). On average, 75% of all trucks used Green Corridors; concretely, since the beginning of the pandemic until present day (January 2022), 1,806,595 trucks used Green Corridors.

Regarding the **bilateral agreements for establishing one stop border/boundary controls**, this measure has seen steady progress, especially taking into account the fact that these types of road transport agreements are not standard practice across the region and require a firm political commitment. The Prime Ministers of Albania and North Macedonia signed bilateral Framework Agreement for establishing Joint Border Crossing Points (JBCP) in July 2021. Upon its ratification, Albania and North Macedonia will introduce the first JBCP on their largest crossing point sitting on the international Corridor VIII - Qafe Thane-Kjafasan. The first joint border JBCP Vracenovici - Deleusa between Montenegro and Bosnia and Herzegovina is operational. In addition, the JBCP Zatrijebacka Cijevna-Grabon between Montenegro and

Albania has started its operations in July 2021, and the JBCP Bratunac-Ljubovija between Bosnia and Herzegovina and Serbia became operational in November 2021 upon completion of the bridge Bratoljub. There are ongoing talks among all Regional Partners at both political and expert levels of the Transport Community, so it could be expected to see even further progress in this area.

The draft proposal on **harmonisation of working hours** was finalised by CEFTA and TCT Secretariats and sent to the partners for further discussions and finalisation in June 2021. The idea is to harmonise the working hours of the agencies involved in the process of clearance of goods, also taking into account categorisation of crossings. The proposal is still under discussion with the possibility to achieve concrete progress at the forthcoming sub-committee meetings.

Negotiations on **CEFTA Additional Protocol on Dispute Settlement are ongoing**. Efficient mechanism for settling trade disputes is necessary to ensure that all the commitments are implemented, making trade more secure and predictable. Until now, 7 rounds have been held, the process is on track and is expected to be finalised soon.

Technical part of the activities on **validating the programmes of authorised economic operators** of North Macedonia, Serbia and Moldova is finalised. Mutual recognition of AEO programmes for security and safety in CEFTA would enable the AEO certified companies to benefit from it in all CEFTA Parties. The status provides for facilitated customs clearance procedures in general. The final Decision is pending adoption by the Joint Committee.

Considering the complexity of measures necessary for implementation of the **Decision facilitating trade in fruit and vegetables**, several technical meetings have been held in the previous period including the preparation of the assessment Reports on implementation of the Decision. Technical discussions were conducted, especially in the context of identifying the most adequate

risk-based approach for the regulation of trade in fruit and vegetables and for clarifying the possibilities for the re-export procedures. Also, the Common CEFTA List of Fruit and Vegetables for which Phytosanitary Certificates are mandatory has been profoundly discussed so that it is aligned with the EU acquis. It should be noted that, in the EU, high interception rates for pest-infested fruit led to a decision to introduce extra phytosanitary measures meaning that all plants and living plant parts have to have a phytosanitary certificate as of 2019. Further steps will imply development of a detailed plan of future actions.

The Parties successfully piloted **three joint customs actions (JCAs) on empty trucks, detection and prevention of smuggling of tobacco and IPR trademark** as joint (common) risk profiles and agreed to continue piloting of JCAs, expanding it with the exchange of real-time risk management information and involving the other agencies in future JCAs. The activity is undertaken under the auspices of implementation of CEFTA Customs Risk Management Strategy. When fully applied (2024), it will improve cooperation between the administrations of the parties, through mutual recognition of controls (among others) and reduced controls at the BCP/CCPs without hampering safety and security, thus reducing waiting times and facilitating trade.

The draft **Decision on reduction of trade costs** was presented to the Parties in April 2021. The proposal is still under discussion. In parallel, the Parties are compiling the lists of fees and charges that were imposed in connection with trade (other than duties and taxes).

In relation to other CRM activities, it should be noted that, in July this year, the Joint Committee adopted *Decision No. 1/2021 amending Annex 4 of the Central European Free Trade Agreement (CEFTA 2006), setting out the Protocol Concerning the Definition of the Concept of "Originating Products" and Methods of Administrative Cooperation referred to in Article 14, paragraph 1 and 3, and re-*

*pealing and replacing Decision No. 3/2013 and Decision 3/2015 of the Joint Committee of the Central European Free Trade Agreement*, in order to introduce transitional rules of origin alongside the rules of the Regional Convention on pan-Euro-Mediterranean preferential rules of origin, pending adoption of the revised Convention.

*Limited progress has been made* in building free movement of services. Negotiations on the CEFTA Joint Committee Decision<sup>10</sup> on facilitating trade in services provided by **travel agencies and tour operators** have been launched with a view of enabling recognition of licences in this sector, based on the model provided by the EU Services Directive. This Decision will serve as a model for further facilitating of trade in services in other sectors where access to market is conditioned with authorisations.

The Parties have *concluded technical discussions* on the CEFTA JC Decision on the disciplines establishing general system for the [mutual] recognition of professional qualifications based on the EU Directive on recognition of **professional qualifications**. The Decision will transpose principal EU rules for recognition based on the levels of qualifications, conditions for recognition and compensation measures. The Decision applies to all categories of natural persons who are granted entry and temporary stay in CEFTA Parties in line with the rules set out in Additional Protocol 6. The Decision covers engineering services and engineering integrated services and calls for gradual extension of the sectoral scope to reach scope equivalent to that of the Directive. Following adoption, the Parties will have 18 months to prepare for its implementation.

The region has *concluded technical discussions* on the **Agreement on Recognition of Professional Qualifications for Doctors of Medicine, Dentists and Architects**, based on [mutual] recognition of professional qualifications as per the EU Directive on recognition of professional qualifications. This Agreement will transpose principal EU rules for recognition based on agreed minimum train-

<sup>10</sup> Hereinafter all CEFTA Joint Committee Decisions will be referred as CEFTA JC Decisions or just Decisions.

ing requirements for the levels of qualifications, conditions for recognition and compensation measures. The Agreement covers three regulated professions, while the remaining four regulated professions – midwives, nurses, pharmacist and veterinary surgeons – shall be negotiated 2022. The Parties will have 18 months to prepare for its implementation.

CEFTA JC Decision on facilitation of **electronic commerce** has been agreed and Parties are in process of preparation for its adoption. The Decision seeks to harmonise key provisions in e-commerce and consumer protection regulations, such as prohibition of prior authorisation, treatment of digital contracts, commercial communication, liability of ISPs and important aspects of consumer protection rules (such as the right of withdrawal). The key trade facilitating measure is introduction of common market principle enabling free movement of information society services with very limited number of reasons for restriction of the provision of these services by the Parties. The Decision is modelled by E-commerce Directive and e-commerce relevant provisions of the Consumer Protection Directive and calls for further cooperation seeking to transpose *acquis* in this area. The Parties will have until 1 July 2024 to adapt their laws, regulations and administrative provisions.

### Free movement of capital

The **free movement of capital** as part of EU Single Market enhances cross-border investment by residents and companies in the European Economic Area (EEA), without discrimination based on nationality, place of residence or place of establishment. In this respect, citizens and companies have the right to transfer money between EEA states open bank accounts, invest in shares and funds, and borrow money in other EEA states. Supporting the development of a modern payment system is one of the main activities of the Free Movement of Capital pillar under the CRM agenda, designed to facilitate cost-efficient intra-regional payments (including remittances) and payments between the region and the EU.

Alongside with the activities on cutting the costs for cross-border/boundary payments, the region also started discussion on options for establishing a regional regulator-led approach to promote Fintech sector development in the region. Discussion is based on the World Bank Group's findings which puts forward the proposed phased Regional Fintech Innovation Hub for consideration, as the most suitable framework for the region.

### Development of modern payment system

The intra-regional payments between economies (from all over world, especially Europe to Western Balkans) have an average cost of 8% (while the EU average is 0.03-0.04%) of the value paid for values ~200EUR and an average of 5% (while the EU average is 0.12-0.16%) of the value paid for values ~500EUR. Therefore, regional activities within this pillar have been targeted to reduce the cost of regional payments. The first step in the right direction was the endorsement of the framework for development of modern payment systems through the Working Group on Financial Markets with the aim of cutting the costs of regional payments and those with the EU, focusing also on interoperability and joining the Single Euro Payment Area (SEPA). Together with the World Bank Group, intensive bilateral consultations with the Western Balkan region were conducted on all four pillars of the framework, including on interoperability, SEPA requirements, safety and security of payment systems and innovative product design.

The importance of these assessments lies in helping the WB administrations to decide on the implementation modalities of development of modern payments systems taking into account different levels of development among each other and available capacities (funds, technical assistance, expertise). European Payments Council shared the requirements for joining the SEPA with WB, including the full list of criteria and geographical scope. The information on SEPA assessment/readiness from a legal/regulatory perspective as well as on assessment in terms of the payments-related EU legislation transposition still need to be imple-

mented by each WB economy, and it has been in the preparation process by the end of 2021.

The region has also made progress on the infrastructure/interoperability option to link payment systems of the WB region, where the discussion led to the need to complete note on non-bank PSP licensing and oversight harmonisation approaches across the region. The objective of this note is to explore the possibility, and available paths, for facilitation of the intra-regional and regional supply of payment services by non-bank payment service providers (non-bank PSPs) through harmonisation of the licensing, regulatory, and supervisory framework.

### Free movement of people

The region drew to a close technical discussions on the **Agreement on Recognition of Higher Education Qualifications** based on the Lisbon Convention for Recognition, Bologna Process and of the EU relevant requirements. The Agreement rules for recognition of levels of qualifications, conditions for recognition, shortens the period of recognition from the current several months to 14 days, establishes joint standards and procedures for recognition of qualifications, and removes the existing recognition fees. It also links the responsible recognition bodies through the Western Balkans Regional Recognition Database. The scope of the Agreement covers public universities and gradually extends to private universities, with strengthened quality assurance. Following adoption, the Parties will have 3 months to prepare for its implementation.

The **Agreement on Freedom of Movement with Identity Cards in the Western Balkans** has also been *technically concluded*. Intensive political consultations are being held to address the outstanding politically sensitive aspects and finalise the draft agreement at the level of WG, and open the way for starting the internal approval procedures within the region. Its enactment would enable citizens to travel freely within the Western Balkan region by removing existing barriers, and strengthen

closer people-to-people relations and cultural exchanges within the region.

The *advanced technical draft* of the **Agreement on Freedom of Movement of Third-Party Citizens within the Western Balkans** has been concluded. However, because of some technical formulations that require further elaboration in order to enable the consistent implementation of the agreement after its entry into force, the participants of the Working Group have requested the support of an external expert to provide concrete recommendations on how to overcome these potential loopholes. The WG re-convened on 17 January 2022 to discuss the revised draft agreement which reflects the technical concerns raised. Written comments will be submitted by the WG, with a view to further improve the draft agreement and finalise its technical segments.

In the context of the Free Movement of People, Parties have *progressed significantly* in technical discussions on the Decision on removal of the requirement of **work permits** for professional activities under the Additional Protocol 6. This Decision will enable categories of natural persons recognised by the Annex 1 of the AP6 to stay in other Parties under conditions laid out therein, without the obligatory work permit or a similar authorisation. It was, however, agreed that this does not prevent the Parties from asking service suppliers to notify competent authorities prior to their arrival. In relation to other activities in the Regional Trade Area, CEFTA has launched a number of initiatives that are expected to result in concrete deliverables in upcoming periods. These are in the following areas: statistics, intellectual property, **quality infrastructure, domestic regulation (services), insurance, postal services, digitisation of trade, trade in products of animal origin, customs in electronic commerce and geo-blocking.**

### 1.3.2 Regional Investment Area

#### Regional investment promotion and policy reforms

Due to the FDI collapsing substantially as an immediate result of the pandemic crisis, the policy focus under this pillar needs to shift back towards addressing key structural constraints to job creation and economic transformation, including weak firm-level productivity, lack of market competition, limited regional economic integration. Relevant to CRM Investment Area and as a result of the Regional Investment Policy and Promotion project led by the World Bank Group, as reported in June 2021, there were \$133mil investments in the region with 17 projects implemented and 3277 additional jobs created, of which 2000 were taken by women. Joining forces in investment promotion and policy reforms should further contribute to attracting more FDI and to retaining existing strategic investments in the region. This will ultimately support economic growth and help create more and better jobs for the citizens of the region. Domestic enterprises will benefit from technology transfers and spill overs and increased linkages with regional and global value chains. Promoting regional value propositions leveraging the combined strengths and competitive advantages of the WB will significantly increase the visibility and relevance of the region for foreign investors.

In this regard, to strengthen the promotional efforts, the region agreed on three sectors for regional investment promotion – automotive, food processing and metal processing – all three being in line with the proposed sector under CRM regional industrial area, thus underlining the complementarities of these two areas that are also reflected in the Working Groups.

#### Regional investment retention and expansion

With the support of regional Investment Promotion Agencies, the region has successfully launched **regional investment incentives database** that will enhance transparency and predictability of regional investment policies leading to higher flow of investments and promoting the region as a safe and transparent destination for business. Foreign investors are still seeking transparent and stable conditions when thinking about investing abroad. Most of the economies around the world are introducing investment incentives as measurable economic advantages that governments provide to specific enterprises, with the goal of steering investments into favoured sectors or regions or of influencing the character of such investments.

The convergence of regional investment standards and legal frameworks with the EU will also foster intra-regional investment flows within the region. However, the inevitable impact of Covid-19 restrictive measures on the treaty-protected rights of foreign investors cannot be neglected; it is likely that the region will continue to be exposed to **Investor-state dispute settlement (ISDS)** claims in the near future. To this date (November 2021), the Western Balkan region concluded 214 investment treaties in total making 7.6% of all such treaties concluded in the world<sup>11</sup>. Like the rest of the world, the region is also facing investment arbitration cases brought against them by investors. Until 1 July 2021, the region was exposed to 43 arbitration cases in total. Almost 70% of these cases were initiated in the manufacturing sector, electricity and gas, mining and quarrying and financial and insurance sectors.

The efforts to circumvent having many ISDS cases have been ongoing throughout the years by organising continuous capacity buildings on ISDS topics and raising awareness on the lack of adequate coordination among different levels of government related to investment claims, as well as on the lack

<sup>11</sup> UNCTAD, Investment Dispute Settlement Navigator, available at [Investment Dispute Settlement Navigator | UNCTAD Investment Policy Hub](#)

of awareness of local governments of the existing treaty obligations. To this end, the WB region is currently in the process of assessing the impact of imposed COVID-19 measures, which might lead to the risk of potential ISDS claims. The full-fledged assessment will ensure the WB governments' preparedness for mitigating potential risks. The regional efforts have, therefore, been invested in exchange of common experiences and best practices in mitigating and avoiding the investment protection issues that may arise in the aftermath of Covid-19.

### 1.3.3 Regional Digital Area

#### Roaming free region and lowering of roaming charges with the EU through a broad Regulatory Dialogue

From 1 July 2021, Roam Like At Home (RLAH) regime has been introduced in full compliance with commitments undertaken under Regional Roaming Agreement (RRA). Currently, WB consumers do not pay extra charges for calls, SMS and mobile data compared to what they pay at home. Roaming free region marks the greatest achievement of regional cooperation so far, bringing tangible benefits for people and businesses. The number of roaming users, as well as roaming traffic, increased in the first three months of RLAH (e.g. in Albania, data volume during Q3 2021 increased by 11 times compared to Q3 2019 or 14 times compared to Q3 2020, in Bosnia and Herzegovina, data volume increased by 520% in Q3 of 2021 compared to 2020, in Kosovo\*, data volume increased in Q3 2021 for over 370% compared to Q2 2021, and for 500% compared to Q2 2020, while in Montenegro, the number of roaming users from the other WB economies increased during July - September 2021 and in some cases reached up to 30%). An information campaign undertaken by RCC and the region through preparation of Frequently Asked Questions<sup>12</sup> helped end-users to understand better the application of RLAH regime.

With the successful implementation of RRA, WB embarked on another demanding and very beneficial process aimed at lowering the roaming prices with EU. The Roaming Data report<sup>13</sup> prepared by the RCC shows high prices for roaming services between the EU and WB and it helped preparation of the Roadmap for lowering Roaming Charges between the EU and WB, which is aligned with WB economies. Political support to this process was reconfirmed during the EU-Western Balkans summit that took place on 6 October 2021 in Brdo Slovenia, by welcoming the Roadmap in Brdo Declaration. Moreover, the Western Balkans Digital Summit 2021 endorsed the policy objectives and the target set forth in the Roadmap through the Ministerial Conclusions. The ultimate goal of the process is to lower the roaming prices with the EU to the level close to domestic prices in 2027, contributing to a decrease of roaming charges by more than 90% in the currently most expensive WB mobile networks. There are two parallel streams in this process: implementation of a set of policy reforms by WB governments aimed at improving business environment in the region, as well as carrying out preparatory activities with WB and EU mobile operators in order to facilitate implementation of the proposed glide path starting as of 2023. Consultations with mobile operators (i.e. 15 July, 27 September and 13 December 2021) helped to address the challenge and concerns regarding the roadmap and the respective proposal for lowering the roaming charges. Work to launch a Regulatory Dialogue between the EU and WB at Ministerial level aimed at addressing regulatory aspects of the Roadmap as well as other regulatory areas covered in Chapter 10 has already started.

#### Improved digital infrastructure and regional connectivity

The region is advancing in terms of broadband development, with the implementation of the projects that are mostly focused on the rural fixed broadband rollout with the aim to cover white areas, as well as on connecting schools and public

<sup>12</sup> [Regional Cooperation Council | Answers to Frequently Asked Questions on Roaming Free Western Balkans \(rcc.int\)](#)

<sup>13</sup> [Regional Cooperation Council | Western Balkans-European Union Roaming Data Report \(rcc.int\)](#)

institutions. Data for some of the economies are promising, i.e. in Kosovo\*, broadband is available to 99.9% of the households, in North Macedonia and Montenegro, 99.48% and 85.64% of households respectively have the possibility to access Internet via fixed broadband connection, etc. There are 11 active WBIF projects in the region, 10 at economy level and one regional project. As of December 2020, WBIF allows for 30% co-financing for digital infrastructure projects, thereby increasing the potentials for more investments under this instrument across the region - the first application for investment grants is already in progress. There are three Broadband Competence Offices (BCOs) already established in the WB region (in Kosovo\*, North Macedonia and Serbia), while two economies (Albania and Montenegro) are preparing for the BCOs to be set up. Implementation of the Memorandum of Understanding on 5G Roadmap for Digital Transformation in the the region kick started and monitoring and reporting approach is agreed, and actions to meet the deadline to free up the 700 MHz band (DD2) as of 30 June 2022 were discussed. In three WB economies, all three 5G pioneer bands are free (Montenegro, North Macedonia and Serbia), in two economies, only 700 MHz band is not freed up (Albania and Kosovo\*), while two economies (North Macedonia and Serbia) are already preparing grounds for 5G auction.

### Enhanced interoperability in the WB region

Following the commitments of the MoU on Regional Interoperability and Trust Services in WB, signed in November 2020 at the 3rd Digital Summit, the work towards improving regional interoperability, including recognition of eIDs and trust services has advanced. Vision, objectives and key components including the timeline for implementation have been agreed<sup>14</sup> and the aim is to enable recognition of eIDs and trust services between

WB. The region is working on identifying intra-regional use-cases so as to ensure launching of regional pilot project(s) aiming to improve interoperability of intra-regional services. As part of the framework for an enhanced interoperability, the region has already initiated work towards the establishment of the framework for free flow of data. This initiative aims to create the conditions for free flow of data, both personal and non-personal data, across the region by removing any existing barrier and optimising the utilisation of existing data centres. To this end, the assessment of compliance with GDPR and respective roadmaps to ensure effective implementation of GDPR requirement across the region have been prepared<sup>15</sup>. Free flow of data is considered the fifth freedom of a common market in addition to the traditional freedoms (free movement of goods, services, people and capital) and will enable unrestricted movement of data across the region and IT systems, unleashing the potentials of digital economy. A regional report – “The regional framework for the free flow of data in Western Balkans region” - is at the final stage of review and based on the recommendations of the report, concrete milestones regarding the required legal changes across the region have been identified.

### Digital upskilling and reskilling

A multi-stakeholder Working Group on digital skills is established with the participation of governments, academia and international partners to serve as the main platform for addressing digital skills needs in the region. The RCC conducted the mapping of key priority sectors, emerging industries and target groups to support a fully-fledged assessment of digital skills gaps and needs<sup>16</sup>. In addition, the methodological framework for the fully-fledged assessment of digital skills gaps and needs in public administration, both central and

<sup>14</sup> Regional Interoperability and Trust Services in the Western Balkans (WB), 2021, available at <https://www.rcc.int/pubs/132/regional-interoperability-and-trust-services-in-western-balkans--methodology-implementation-vision-and-action-plan>

<sup>15</sup> [Regional Cooperation Council | Compliance of Legal Framework in the Western Balkans Economies With the General Data Protection Regulation \(GDPR\) Requirements \(rcc.int\)](#)

<sup>16</sup> [Regional Cooperation Council | Digital skills needs and gaps in the Western Balkans - scope and objectives for a fully-fledged assessment \(rcc.int\)](#)

local, has been prepared based on approach of EC DigiComp for citizens. Work to create a self-sustainable regional framework to support digital upskilling and reskilling, including the launching of the WB Digital Skills Jobs and Coalition mirroring the EU practice has started, aimed at establishing direct links between digital skills supply and demand, creating conducive environment for innovation and start-ups creation and supporting knowledge transfer and increased job opportunities for youngsters and other target groups.

### Digital economy and industry digitisation

High-level dialogue on digital transformation is organised through Digital Summit(s), the region's annual flagship event, to ensure the exchange of knowledge and experience from practice in the region, as well as to further discuss the challenges that the region is facing. The 4th Western Balkans Digital Summit 2021 took place from 11 to 13 October 2021 in Podgorica. The Summit Conclusions and two draft Joint Statements (i.e. on the Free Flow of Data in WB and on Interoperable Western Balkans) display the key actions and priorities for 2022. Moreover, regular ICT Ministerial meetings (i.e. 1 July 2020, 25 June 2021) also served as a high-level platform to address core regional actions toward a better digitally connected region. Efforts have been made to establish an agile and evidence-based monitoring tool to track the progress in digital transformation (Digital Economy and Society Index, DESI) based on DESI methodology<sup>17</sup>. First networking meeting of Digital Innovation Hubs (DiH) has been organised following the mapping of Western Balkans DiHs<sup>18</sup>. First ever regional competition was launched in 2020 with the aim to respond to Covid-19, and Balkathon 2.0 successfully proposed 6 innovative digital solutions<sup>19</sup>.

### 1.3.4 Regional Industrial and Innovation Area

More specifically, the implementing actions under Regional Industrial and Innovation area are further grouped in three sub-areas, as follows: 1) Innovation, 2) Industry, and 3) Tourism.

#### 1) Innovation

#### Integration into the European Research Area

The Regional Innovation Area (RIA) aims to build a dynamic regional innovation ecosystem by supporting the region's businesses in priority industry sectors to innovate, grow and contribute to European and global value chains. Close cooperation was established under the Western Balkans Innovation and Research Platform with the European Institute of Innovation and Technology (Knowledge and Innovation Communities - KICs) and other stakeholders such as the Enterprise Europe Network and Eureka Network towards synchronising regional activities. The region's full integration in the European Research Area has been reiterated through the endorsement of the Western Balkans Agenda on Innovation, Research, Education, Culture, Youth and Sport by the region's leaders during the Slovenian Presidency's EU-Western Balkans Summit in Brdo pri Kranju, and the forthcoming association to Horizon Europe. The region's alignment with the EU Open Science practices has continued through the *Network of Open Access Research Infrastructures in the WB* that is now fully operational. The first *Strategic foresight in the Western Balkans: Recovery on the Horizon* report has been published to outline three scenarios on the probable futures of Research & Innovation policies in the region by 2035. The first regional online tool focusing on regional innovation developments is going to be launched shortly to act as a regional information hub on existing/upcoming opportunities, networking and knowledge sharing. Several milestones have been achieved through supporting regional innovation infrastructures.

<sup>17</sup> [Regional Cooperation Council | Report on the State of Application of Digital Economy Society Index \(DESI\) in Western Balkan Economies \(rcc.int\)](#)

<sup>18</sup> [Regional Cooperation Council | Mapping of digital innovation hubs, and identification of needs within Western Balkans and of prospective regional cooperation actions \(rcc.int\)](#)

<sup>19</sup> For more info, please visit [Balkathon \(rcc.int\)](#)

## Supporting regional research and innovation infrastructures

The *first Research Infrastructure Roadmaps in Albania, Bosnia and Herzegovina, Kosovo\* and North Macedonia* were created and translated to maximise the access to, and effective use of research infrastructures in these Western Balkan economies. As a follow-up, the *first Western Balkans Research and Innovation Infrastructure Roadmap* is under preparation to identify the strategic fields for future innovation ecosystem investments, boosting regional cooperation between academia and businesses and encouraging commercialisation of knowledge. In addition, the *Technology Transfer Support Programme in the Western Balkans* has been launched to support technology transfer practices and facilitate the regional networking of Technology Transfer Offices.

Following a successful mapping of the region's Digital Innovation Hubs (DIHs), the preliminary regional exchange among DIHs has begun. Within the creation and expansion of innovation ecosystems, *capacity building of research & innovation National Contact Points (NCPs) in the region* was designed to enhance the competence of less experienced NCPs in the region from the very beginning of official association to Horizon Europe. The *first regional Butterfly Innovation & Business Forum* was organised in partnership with the Europe Enterprise Network in Skopje and online on 16th and 17th December 2021. The Forum showcased around thirty innovation success stories from the region to encourage the development of a regional innovation ecosystem. As a part of the WB Competitiveness and Innovation Accelerator, talks and discussions with various partners on modalities of a regional early-stage innovation support scheme continued with the focus on launching regional pilot projects.

Access2Finance and Innovation platform (FINNO) was launched by the Enterprise Europe Network to improve access to finance for small and medium-sized enterprises (SMEs) in South East Europe. FINNO offers a range of possibilities to

SMEs including information on key financial and innovation schemes available to SMEs, organising business to business and business to finance meetings, networking opportunities, and feeding innovation-related information to SMEs that plan to compete in international markets.

## Regional Diaspora Knowledge Transfer Initiative

The *Regional Diaspora Knowledge Transfer Initiative* was introduced through regular meetings of the Working Group on Diaspora. Its focus in 2021 was on regional knowledge sharing, creating a *Compendium of Diaspora Initiatives in the Western Balkans* and organising a *Regional Diaspora Forum* in early 2022 as a preparatory step towards the diaspora ministerial conference to be held during the second half of the year.

## Regional Network of Women in STEM for the Next Decade

The *Network of Women in STEM in the Western Balkans* was established in April 2021 to encourage the increased participation of girls and women in STEM. The initial steps to formalise the STEM Network have been undertaken, including the STEM Network's Council inauguration and creating the founding documents (Regulatory Framework, Code of Conduct, Manifesto, Communication Plan and Action Plan). Preparations for the launch of a regional STEM role-models campaign in early 2022 were completed. The campaign is designed to incentivise increased participation of girls/young women in STEM fields. In parallel, the STEM Network focused its efforts on introducing the first regional mentorship programme to bring STEM education/careers closer to young women in the region.

## 2) Industry

### Mapping of key regional industries and establishing a Regional Supplier Development Programme

The efforts towards the establishment of a Regional Supplier Development Programme were initiated in key industries of the CRM, led by the WB6 CIF and in close cooperation with the RCC. Mapping of the automotive sector was completed in June 2021, while mapping of the light manufacturing agro-food sectors, circular economy and mapping of clusters in the above sectors has been completed in December 2021. Based on the mapping results, a total of 2104 companies have been registered, with 54% belonging to the light manufacturing, 33% belonging to the agro-food industry and 13% to the automotive industry. Additionally, 38 clusters in these sectors have been mapped. A tentative gender mainstreaming of the mapping activity shows a rough estimation of about 30% of the registered companies owned by women.

These databases facilitate gathering and presentation of information regarding suppliers and investors in the mapped sectors, as well as about the products and services that suppliers offer. Therefore, as of December 2021, two databases were established and are available: Market Intelligence database (<http://market-info.wb6cif.eu/>) and Market Access database (<https://www.market-access.wb6cif.eu/>). **These versions will be updated and promoted in the year 2022.**

In 2021, almost 5000 WB companies participated in different events or initiatives launched by WB6 CIF - free online seminars, consultative meetings, promotional events, etc.<sup>20</sup> Since 2020, 1147 WB SMEs have been reached with trade promotion activities, 750 SMEs received individual, tailor-made support to look for business and funding opportunities across borders/boundaries.

Towards this aim, two regional business events were organised, a joint Programme for 30 IT start-ups and small companies within the Podgorica WB Digital Summit, and the Tirana International Trade Fair with a joint delegation of 30 food processing companies and 6 retail chains from the WB. In addition, two regional B2B events were organised, the Construction and Infrastructure in WB in Sarajevo in September 2021 with 80 participants, and the Agro-food Sector in Tirana in December 2021 that included more than 150 B2B meetings during the International Trade Fair.

11 info days organised focusing on the Implementation of the CRM AP and the benefits and challenges it brings to the businesses from WB, with 6 info days related to the involvement of WB companies in drafting CRM AP, 3 info days on CRM AP and 2 days on presentation of the agreed CEFTA Additional Protocol 6 on Services. Also, 9 tailor made trainings were organised to support business community in yielding the benefits of the regional economic integration.

Two analyses on the Key Performance Indicators and Monitoring of Implementation of the CRM AP have been developed and presented (During the WB Berlin Summit, June 2021 and CEFTA week, December 2021).

### Creative Industries

Creative industry is one of the key industries identified by the WB region as having a potential for regional industrial development. In the efforts to support its regional development, a mapping of the industry in the whole region was initiated by the RCC in 2021, providing preliminary findings on policy environment, studies, major initiatives and events, key stakeholders, challenges and opportunities in the region, including economy overviews for each WB economy.

<sup>20</sup> Activities within the EU funded project "EU support to the WB6 CIF, CN 2019/408-715"

## Women Economic Empowerment

In the framework of the *Women Economic Empowerment Agenda, a study on "Economic benefits of gender equality and women's empowerment in the Western Balkans"* was commissioned by the RCC and published in April 2021. The study shed light on the state of play of gender equality and women's empowerment in the WB, provided an overview of the COVID-19 impact and measured the economic benefits of gender equality measures in the WB region. The recommendations from the study, as well as the regional WEE roundtables (organised by RCC and its partners) will serve as a basis for further actions to be undertaken in the coming years, including establishing a *Western Balkans Women Entrepreneurs (WE) Hub* as part of the "entrepreneurship support" actions of CRM's Regional Industrial and Innovation Area and promoting the WB region's women's entrepreneurial spirit through a Regional Competition for Women Entrepreneurs.

An important element of RCC's WEE Agenda is strengthening cooperation with regional and international partners that operate in the same area. An important milestone was set in the cooperation between RCC and UNDP through a *"Women Economic Empowerment: Areas for joint actions in the Western Balkans"*<sup>21</sup>. In the framework of this Joint Initiative and the Common Regional Market Action Plan, a Regional Roundtable<sup>22</sup> on Women's Economic Empowerment was organised on 14 December 2021, bringing together renowned women leaders in the region to discuss further the strengthening of partnerships, establishing a Regional WE Hub and sharing inspiring experiences between and with women in the region.

## 3) Tourism

The RCC built on communication efforts on the developments in the regional tourism agenda since the adoption of Tirana Declaration and the closure of the Triple P Tourism Project. Given the importance of tourism in the region and its pre-pandemic statistics of 15% contribution to the region's GDP and more than a half a million employees and numerous positive spillover effects on various socio-economic areas of the Western Balkan region, tourism became a part of CRM under industry & innovation area, as a sustainable tourism pillar. One of important activities in this area is dedicated to coordination of exchange of information on developments in various priority areas pertinent to the region's sustainable tourism development (regional routes development, promotion, certification, skills and diplomas recognition, and employment with reflection on youth employment, and other priority areas). Therefore, the RCC proposed joint platform for coordination of various tourism agendas that are being undertaken and implemented in the region (both on the regional and individual-economy levels), in order to develop synergies where possible and avoid duplication of work. Moreover, ambitious plans of various tourism stakeholders in the region in combination with exhaustive budgets inevitably impose the need for cooperation and joining forces in supporting tourism growth.

In line with the CRM AP developments, Tourism Expert Group-TEG renewed its mandate accordingly as a CRM TEG. "Refreshed" priorities and actions of CRM TEG will include: maintaining regional dialogue on sustainable tourism development and promotion, promoting regional tourism routes/trails in the EU/international markets and supporting their integration into EU tourism routes, establishing Western Balkans Tourism Crisis Committee (WBTCC) and developing Tourism Emergency Plans and Crises Management Strategies, establishing regional tourism platform to support

<sup>21</sup> [Regional Cooperation Council | Women's Economic Empowerment: Areas for joint actions in the Western Balkans \(rcc.int\)](https://www.rcc.int/en/2021/04/21/regional-cooperation-council-women-economic-empowerment-study-on-economic-benefits-of-gender-equality-and-women-s-empowerment-in-the-western-balkans/)

<sup>22</sup> <https://www.rcc.int/en/2021/12/14/women-economic-empowerment-wee-roundtable-building-a-sustainable-western-balkans-women-entrepreneurs-hub/>

digital transformation and exchange of good practices, developing common occupational standards for tourism, piloting mutually-recognised practical training programmes, and improving regional tourism data and statistics.

The region's weaknesses and strengths of the tourism industry will be assessed regarding its compatibility with the GCST and ETIS sustainability indicators, potentially leading to uncovering new ideas and/or irredeemable obstacles, and making recommendations for methodology and strategy to maximise the indicators systems' application efforts. This will be the first step of de-

velopment and critical to the long-term benefits and successful implementation and production of sustainable tourism roadmaps adhering to OECD's Green Innovation Strategy and the European Tourism Indicators System (GCST and ETIS indicators).

All technical documentation for the establishment of the Western Balkans Tourism Crises Committee will be prepared in the first quarter of 2022. WBTC main role would be to unite tourism sector and lead a strong and consistent response to the intermediate and long-term crisis, leading to harmonised approach to restarting tourism, especially in cases such as pandemic.

## 2. Key achievements in CRM - Economy level

### 2.1 Albania

#### Regional Trade Area

- Under CEFTA Secretariat, Albania has worked at the regional level to extend the Green Lanes/Corridors with EU Member States, with Greece at Kapshtica and Kakavija BCP it is prepared and sent the priority list of pharmaceutical products and vaccines and Covid test that will pass through green corridors to the CEFTA Secretariat.
- Albania has submitted the working hours of all agencies working at crossing points to the CEFTA Secretariat and Transport Community. It is important to emphasise that Albanian customs administrations and national Food Authority work 24/7, based on an Order of the DGC and DG of NFA.
- In the framework of Agriculture and SPS, the Subcommittee is working to implement the Joint Committee Decision on Facilitating Trade in Fruits and Vegetables, where it agreed on the list of fruits and vegetables with similar phytosanitary situation in all the Parties. Albania has prepared the draft Council of Ministers Decision. The purpose of this draft act is the amendment with some additions and changes of decision no. 317 of the Council of Ministers "On the approval of rules for sustainable use of plant protection products and qualification criteria for users", dated 9.5.2019, in order to improve the requirements regarding the use of PPPs. The draft Decision sets out the obligation of the producer to maintain and complete the register of use of PPPs on the farm.
- The register, which records all treatments performed with PPP from planting or transplanting seedlings to the end of the plant cycle, serves as a very important basis for identifying the use of PPPs, and in particular for the traceability of pesticide residues in product plants emerging in the domestic market or for exports.
- Regarding implementation of the Decision of the Joint Committee on the mutual recognition programmes of the Authorised Economic Operators (AEOs), the General Directorate of Customs has established the working group which will verify the applications and fulfilment of the legal requirements defined by the legislation in force. The Ministry of Finance and Economy and General Directorate of Customs have organised public awareness campaigns with business representatives and trade union representatives for promoting the benefits / advantages / authorisation requirements of the AEOs. As a result of this campaign, there are 8 applications for authorisation from the companies which are under the process of examination and completing required documentations. The AEO authorisation has been issued to 8 companies. During September 2021, the Albanian Customs Administration submitted the application for AEO validation to the CEFTA Secretariat. The aim is to speed up the process of completing the documentation and

the validation process, so that our AEO companies are recognised by the CEFTA parties.

- CEFTA Additional Protocol (AP) 6 on liberalisation of trade in services is ratified by Albanian Parliament with the Law No. 46/2020 dated 23.04.2020 "On ratification of the Additional protocol 6 on Trade in Services, on amending and adhering to the Central European Free Trade Agreement CEFTA 2006". In reference to the Article 24, paragraph 2, related to the entry into force of the Protocol, Albania has informed CEFTA Secretariat and parties that after depositing the third ratification instrument, the Protocol has entered into force on 11 January 2021. In order to raise business awareness of these rules, our customs administration has conducted a series of trainings in each customs branch with customs staff, customs agencies and economic operators operating near these branches.
- Albania has completed the internal procedures for the approval of the Decision of JC on e-commerce.
- Albania has concluded the internal procedures and has ratified the Protocol of the revised applicable alternative rules of origin concerning the definition of the concept of 'originating products' and methods of administrative cooperation with the European Union, with CEFTA and EFTA States, before 1 September 2021.
- A Time Release Study is being conducted by the IFC in cooperation with the Albanian Customs Administration. The project started in October 2021.
- According to the Priority Area "Free movement of services", National Authority on Electronic Certification and Cyber Security is responsible for adopting the framework for mutual recognition of electronic signatures as well as other forms of eIDs and trust services based on the relevant EU acquis. Actually, the

Authority is working on fully transposing the new eIDAS Regulation, a process foreseen to finish by the end of 2022, taking into account the approval of the new eIDAS Regulation by the European Commission.

- Actually, the Authority performed regular audits of the qualified trust service providers, to monitor technical and organisational conditions while providing their trusted services.
- The qualified trust service providers have submitted to the Authority the updated documentation related to technical and operational changes in their systems.

### Investment Area

- New Business and Investment Development Strategy and Action Plan 2021-2027 adopted in July 2021 with one of the main aims being investment attraction and internationalisation.
- Investment Readiness Programme initiated in June to provide Albanian mid stage start-ups an exclusive 1on1 support programme to help them prepare specifically for their first round of investment. The project brought together Coolab from Tirana, Albania and ICT Ventures from Serbia to jointly implement the project. After two introductory workshops, where the host shared some fundamentals of start-up valuation and the investment process, each founder got assigned one coach to work with for the duration of the programme.

### Digital Area

- Efficient implementation of the Regional Roaming Agreement and successful introduction of the Roam Like At Home, including through adoption of Fair Use Policy.
- Fully-fledged feasibility study and CBA for broadband development as part of WBIF project completed in July 2020; based on the results, two additional WBIF projects for broadband development in rural and white

area commenced implementation on 15th of October 2021. The 3rd Western Balkans Digital Summit successfully organised in hybrid format with online sessions 26-28 October 2020 and Digital Ministerial meeting on 2nd November 2020 in Tirana. Two Memorandums of Understanding were signed (i.e. on 5G for digital transformation of Western Balkans and on interoperability and trust services in the Western Balkans).

- Draft frequency plan to free up 700 MHz was prepared with technical assistance of International Telecommunication Union (ITU) and approved by a decision of the Audiovisual Media Authority (AMA) on 26th of November 2021. Two spectrum coordination meetings with Montenegro and North Macedonia held on 8th and 20th of October 2021. The process of -borderintra-regional spectrum coordination for 700 MHz is ongoing; the broadband penetration rate has increased considerably and constantly<sup>23</sup>.
- Progress is noted on e-government services; every application for public services is made online only through the government platform e-Albania. 95% of services are offered through this platform allowing for all accompanying administrative documents to be provided by the institutions themselves with e-signature or stamp, and the real-time monitoring of deadlines for the collection of accompanying documentation for the applicant file<sup>24</sup>. Today, e-Albania counts 2.3 million registered users and 16.5 million applications of e-services, since its introduction.
- Open Data Portal Established; by 2021, 433 datasets have been published on the Open

Data Portal in various fields such as health, treasury, customs, education business, etc. in line with the national Law on the Right to Information. 20 public institutions are actively engaged, with the rest being encouraged to make their data available as open data; 2020-2022 National Plan of Open Government Partnership has been drafted.

- National Cybersecurity Strategy and its Action Plan 2020-2025 adopted; transposing of the new NIS Directive is ongoing with prospects to be completed by the end of 2022; extended list of critical information infrastructures and list of important information infrastructures approved; national CSIRT and sectorial CSIRT have been set up. National CSIRT fully equipped and all sectorial CSIRTs have defined their points of contact.
- A cyber incident reporting and management system has been set up for CIII to report in real time the cyber incidents that may occur in their systems; MoUs with North Macedonia, Kosovo\* and Romania have been signed; workshops, cyber drills, roundtables, etc. have been organised; awareness raising campaign with young people, including through directions/manuals and conferences is carried out; a tool in [https://cesk.gov.al/permbajtje\\_te\\_paligjshme.html](https://cesk.gov.al/permbajtje_te_paligjshme.html) to help children and young people to report illegal/harmful content while using internet developed.
- NAECCS is full member of FESA (Forum of European Supervisory Authority), has been accredited by TF-CSIRT Trusted introducer, fellowship membership of FIRST, part of ENISA Article 19 Expert Group.

<sup>23</sup> Number of subscribers with fixed broadband access at the end of the Q2 of 2021 reached 527,000 or increased by 25% compared to 2019; total number of active broadband mobile broadband users who have used the internet service at least once during the Q2 Quarter 2021 was 2,058,882 or an increase by 31.7% compared to Q2 of 2020; majority of subscribers (43%) have speeds of 10-30 Mbps. In 2020, the number of subscribers with speed access between 30-100 Mbps increased about 4 times compared to 2019; main technology providing broadband access to fixed networks is fiber optic connections (FTTH/FTTB) followed by DSL connections marking an increase by about 68% compared to 2019; FTTH/B) for 2020 accounts for about 46% of total connections with an increase of 14 % compared to 2019.

<sup>24</sup> As a result, calculations show that 766 years have been saved for citizens in terms of waiting time, and about EUR 6.5 million; 160 million A4 sheets have been saved;

- The alignment of the national legislation with the GDPR and the Data Protection Law Enforcement Directive is achieved through the preparation of the new draft Law on Personal Data Protection, formally presented by IDP Commissioner to the Ministry of Justice on 24 November 2021 to start with further procedures until its approval.
- New draft Law on Personal Data Protection to achieve full alignment with GDPR and Data Protection Law Enforcement Directive is prepared, and approval procedures will follow; draft laws “On the ratification of the amending protocol to Convention 108” and “On the protection of individuals with regard to automatic processing of personal data” (commonly referred to as Convention 108+) approved in principle by Council of Ministers, and procedures for signing in progress.

### Industrial and Innovation Area

On support to SMEs, the Business and Investment Development Strategy and Action Plan 2021-2027 aim to develop and complement measures and initiatives for the implementation of these strategies and programmes. During 2021, the focus has been dedicated to the estimation of SME needs, where in June the Albanian Investment Council launched the results of the survey Impact Assessment of Covid-19 on Business Activity in Albania. With EBRD assistance, in April 2021, the Ministry of Finance and Economy established a centralised information portal on access to finance which provides the information on all available financial instruments for SMEs. The visitors to the platform were 24.15% male and 45.85% female, mostly from Albania, USA, Italy and Germany. In addition, a report on “Support for the digitalisation of SMEs in Albania to mitigate the negative economic impact of COVID-19” was prepared by MoFE with the support of the EBRD in March 2021.

Based on this report, a new priority measure is formulated, namely “e-business development initiative” in the new Strategy for Development of Busi-

ness and Investment 2021-2027. This measure aims to improve SMEs’ competitiveness and access to markets by helping them to adopt digital solutions for e-commerce and e-business, strengthen digital capabilities and skills of SMEs, to ensure a sound business and regulatory environment for e-commerce to support entrepreneurs and SMEs using synergies with measures foreseen in the new Digital Agenda and CRM 2021-2024.

## 2.2 Bosnia and Herzegovina

### Regional Trade Area

- Education Department of Ministry of Civil Affairs of Bosnia and Herzegovina participated in drafting of the following documents: Draft agreement on the mutual recognition of professional qualifications of doctors of medicine, doctors of dental medicine and architects in the context of the Central European Free Trade Agreement; Draft agreement on recognition of academic clarification; Decision of the Joint Committee of the Central European Free Trade Agreement on the disciplines establishing a general system for the mutual recognition of professional qualifications. In accordance with its coordinating role, the Ministry of Civil Affairs coordinated activities with entity, cantonal and Brcko District of Bosnia and Herzegovina institutions in Bosnia and Herzegovina to keep them informed on current activities and consult them on the above-mentioned documents.
- Additional Protocol 6 on trade in services published in Official Gazette of Bosnia and Herzegovina – International Agreements 17/20 and 1/21 and entered into force for Bosnia and Herzegovina on 11 January 2021.

- Decision of the Joint Committee of the Central European Free Trade Agreement No. 1/2021 amending Annex 4 of the Central European Free Trade Agreement (CEFTA 2006), setting out the Protocol Concerning the Definition of the Concept of “Originating Products” and Methods of Administrative Cooperation referred to in Article 14, paragraphs 1 and 3, and repealing and replacing Decision No. 3/2013 and Decision 3/2015 of the Joint Committee of the Central European Free Trade Agreement was adopted in July 2021– under internal procedures, waiting to be approved by Council of Ministers of Bosnia and Herzegovina, after which it will be published and enter into force.
- CEFTA Decision on facilitating electronic commerce (text decision agreed on technical level, consultations within Bosnia and Herzegovina’s institutions finished).
- CEFTA Decision regarding professional qualifications (text decision agreed on technical level, two open issues – political – remain).
- CEFTA Decision on work permits (under the consultation).
- CEFTA Decision on facilitating trade provided by travel agencies and tour-operators (under the consultation).
- A Time Release Study is being conducted by Indirect Taxation Authority of Bosnia and Herzegovina, methodology, guidelines and BPA drafted, WG on TRS should be established.
- Response to the questionnaire on the fulfilment of requirements for participation in SEPA submitted by the representatives of Republika Srpska.<sup>25</sup>
- Participation by the representatives of Republika Srpska in two meetings of the Working Group on Financial Markets meetings, maintaining regular dialogue with RCC, including

through the submission of comments to the following documents: harmonization of the framework applicable to Non-bank payment service providers (PSPS) in the Western Balkans and Transposition of EU acquis and SEPA readiness.<sup>26</sup>

## Investment Area

- On regional investment policy reforms, Bosnia and Herzegovina (i.e. Ministry of Foreign Trade and Economic Relations of Bosnia and Herzegovina – MoFTER BiH) has taken preparatory activities related to analytics and preparation of draft documents that will be put in legal procedure in due time, which is required for entering into negotiations for the conclusion of the Agreement on Investment Promotion and Protection between Bosnia and Herzegovina and the EU.
- Officials from Ministry of Foreign Trade and Economic Relations (MOFTER), responsible for bilateral investment agreements and trade-related agreements, participated in the two-weeks of extensive trainings organised by GIZ on substantive standards for investment protection, drafting Bilateral Investment Treaty (BIT) model, concept of ISDS, ongoing reform process in the UNCTRAL, EU investment policy, arbitral procedures in July and September 2021.
- On reviewing COVID-19 response for possible mid- to long-term ISDS risks and other legal risks, the MoFTER BiH provided interpretation of BIT provisions and consequences of state activities in case of violation to the concerned institutions in Bosnia and Herzegovina.
- On regional investment retention and expansion, the Permanent Body of the Peaceful Settlement of International Investment Disputes of Bosnia and Herzegovina continued its work in 2021, as well as necessary preparations for

<sup>25</sup> Update on activities is provided by the Ministry of Finance of Repulika Srpska.

<sup>26</sup> Update on activities is provided by the Ministry of Finance of Repulika Srpska.

investment policy reforms under the auspices of different regional and international fora.

### Digital Area

- Efficient implementation of the Regional Roaming Agreement and successful introduction of the Roam Like At Home.
- Memorandum of Understanding signed between the Council of Ministers of Bosnia and Herzegovina (CoM B&H) and Oracle BH.
- Test version of Open Data Portal Established – CoM B&H pilot (EUD technical support and led by PARCO); Assessment of Openness Data Readiness of the Republika Srpska as part of the project “Support to eGovernment Reforms and Digitization of Services in B&H”.
- Public administration IT projects catalogue-pilot for CoM B&H established (EUD technical support and led by PARCO).
- Established working groups for Interoperability in B&H. Interoperability coordination for CoM B&H (horizontal coordination) and Multisector inter-administration working group (vertical coordination).
- Indirect tax authority implemented Paperless custom system (after becoming first B&H institution accredited as qualified Trusted service provider).
- Respa and PARCO presented Roadmap for the improvement of digital services in B&H formulated by AP of the Strategic framework for Public administration reform 2018 – 2022 which will be used as framework for: developing service catalogue, developing Shared Service Center at each administrative level in

B&H, creation of e-Paying service, creation of citizen e-Mailbox service.

- GSB governmental services “bus” (included upgrade with Meta Register); The register of valid technical and other regulations to the government e-services web portal added (eu-prava.fbih.gov.ba).
- ITU technical assistance project on enabling environment for broadband mapping in Bosnia and Herzegovina implemented to the request of Communications Regulatory Agency.
- 173 active ICT projects (2021)<sup>27</sup> within the Government of the Republika Srpska aimed to digitalize either doing business or public services delivery, at republic and local levels. Digitizing data of all the courts that deal with the registration of businesses in service of the electronic registration of businesses project completed.
- Guidelines for the Strategic Framework for Cyber Security developed; Preparation of cyber security strategy ongoing; Work Plan of the Ministry of Security and the Council of Ministers on the matter adopted; draft law on Network and Information Security at final stage of preparation; Finalized implementation of cyber security solutions to enable automatized cyber security monitoring of key ICT infrastructure of the Republika Srpska.

### Industrial and Innovation Area<sup>28</sup>

- Strategy of Industrial Development of Republika Srpska 2021–2027 harmonised with other economic and strategic-planning documents of the Republika Republika Srpska, industrial policies of the EU and regional strategic documents and modern international practice.

<sup>27</sup> The most significant realized projects in 2021 are: eBaby – introduced electronic registration of newborns; established functional PKI infrastructure (90 qualified certificates – e-signature and e-seal have been issued); finalized information system for Online Business Registration service; finalized information system for e-building permit service; Project ‘e-office’ with the aim to digitalize document management system; eduis (Unique information system intended for efficient management and development of modern education); digitalized e-procedures of the Tax Administration of the Republika Srpska;

<sup>28</sup> Industrial and Innovation Area for Bosnia and Herzegovina contains the information only from one entity – Republika Srpska – and therefore cannot be seen as completed for the level of Bosnia and Herzegovina

- Strategic goals for the development of manufacturing industry in the period 2021-2027 are defined as follows: increase the production of the higher phase of processing, reduce the foreign trade deficit in industry, increase employment in industry, increase investment in industry and reduce harmful environmental impacts.

## 2.3 Kosovo\*

### Regional Trade Area

- Extension of Green Lanes to all BCPs/CCPs – pre-arrival information provided to the relevant agencies (customs, phytosanitary, veterinary and food inspections).
- Green Lanes/Corridors portal on statistics data improved – however, services (phytosanitary, veterinary and food inspections) are not available 24/7 for importers and exporters at all BCPs/CCPs.
- One-stop-shop in BCP/CCP Hani Elezit to the rail is at final stage of implementation.
- BCPs/CCPs Merdare and Hani Elezit and Vermica with functional infrastructure for separation of cars, buses and trucks.
- Reached agreement at CEFTA level with Italy, Greece and Bulgaria with regard to green lanes to the BCPs with the EU-MS.
- Time Release Study (TRS) project financed by WB and implemented by IFC to measure customs clearance waiting time.
- Customs SEED+ upgrade- Kosovo\* has appointed representatives of Customs, KFVA (AVUK) and AKPM (KAMP) to work on the upgrade during 2022-2023.
- Continuation of the negotiation of AP7 on Dispute Settlement Mechanism – 6 finished rounds of negotiations.
- Report on Non-Tariff Measures in CEFTA finished with the support of GIZ.
- Committee on Trade Facilitation established with the aim to coordinate with the private sector.
- All permits, licenses, fees and charges related to the procedures of exports, imports and transit of goods are published on the MIET website.
- Internal procedures regarding the cumulation of origin with the EU, Turkey and CEFTA, deriving from PEM Convention completed.
- A new Regulation 01/2021 on Gas appliances has been approved.
- The concept document in the field of General Products Safety is approved.
- Three bylaws in the area of construction products have been approved (for doors and windows, for terrazzo tiles and for thermal insulations products –EPS).
- The online register of technical regulation, draft technical regulation, foreign documents of conformity and designated CABs have been launched.
- Programme for Removing Obstacles to Trade under Articles 34 – 36 TFEU (2021 – 2025) has been approved.
- “Assessment of domestic regulatory frameworks in tourism in CEFTA to support the facilitation of trade in tourism services” drafted at CEFTA level where Kosovo\* contributed.
- No barriers in Kosovo\* legislation on tourism regarding the establishment of business to be addressed.

- Participation in negotiation regarding the “decision on facilitating trade in services provided by travel agencies and tour operators” at CEFTA level.
- Participation in negotiations on recognition of professional qualifications under RCC & CEFTA for three qualifications: Medical Doctors, Dentists and Architects. The process is suspended until further decision from EU in cooperation with RCC and CEFTA due to disagreements about the terminology used in the draft agreement.
- [Law No. 08/L-022 on Electronic Identification and Trust Services in Electronic Transactions](#) published in Official Journal on 23.12.2021.
- Kosovo\* has started drafting the concept document on e-commerce.
- As regards free movement of capital, we have conducted an analysis of the domestic legal framework and its compliance to EU acquis in payment services. The study assesses readiness for participation in SEPA. In this regard, Kosovo\* is currently in the process of identifying and preparing legal changes in line with the requirements for joining the Single Euro Payment Area (SEPA).
- As regards the mobility of individuals, the working group has come to an agreement with regards to the technical issues within the draft agreement.
- The agreements reached within one process were reflected in the other. Kosovo\* has contributed constructively and actively to the regional dialogue by sending all comments in time and participating in all meetings, on-site or online.
- On 26 November, 2021 Agreement on the Mutual Recognition of Diplomas, Certificates and Scientific Degrees issued by Higher Education and other Certified Institutions signed with Albania, which provides for the electronic

verification, thereby eliminating the paperwork-based bureaucratic recognition procedures.

- On 26 November, 2021 Agreement on the Mutual Recognition of Social Insurance including the pension benefits signed with Albania.

### Investment Area

- Participation in RCC-led working groups on the strategic development of value chain industries and provision of recommendations and proposals on specific support to industrial sectors.
- Engaged in further studying of the value chain in various sectors in the domestic market. Three sector specific value chain studies have been prepared and another two are underway.

### Digital Area

- A grant matching scheme to support private sector to invest in rural areas broadband connectivity introduced through KODE; white areas covered and 99.9% of residents have possibility to access fixed broadband infrastructure (> 30Mbps); BCO is established within the Ministry of Economy.
- Research and Education Network (KREN) has been established; connecting of all Higher Education Institutions (HEIs) with KREN and through KREN with the pan-European network GEANT is at final phase; KREN Data Centre will be operational by the end of 2021 with the aim of offering large number of Microsoft Azure services and other accompanying services for HEIs.
- Preparation of Digital Agenda 2030 started - development of 5G networks included; Advanced Secure Digital Infrastructure has been identified with the aim to create suitable conditions for the development of the 5G networks and providing necessary frequency spectrum, including the so-called 5G pioneer

bands; work to prepare the release spectrum for 5G started.

- IPA 2017 funded project EU Support for the Competitiveness of Kosovo\*'s ICT Sector started implementation in October 2020<sup>29</sup>; YOU Programme as part of KODE project at advanced level of implementation<sup>30</sup>.
- MESTI: Ministry of Education, Science, Technology and Innovation is currently developing the new 2022-2026 Kosovo\* Education Strategic Plan. One of the 4 key areas of the Plan is Digital Education which focuses on improving digital skills of citizens.
- Education Strategic Plan 2022-2026 at development phase; special provisions to address the needs of vulnerable groups considered.
- Draft law on electronic identification and trusted services for electronic transactions adopted by Government; the Assembly has approved it in principle and final approval and entry into force expected by the end of 2021.
- Participation in regular high-level meetings including Annual Digital Summit in Podgorica, Montenegro.

### Industry and Innovation Area

- On Regional Supply Chain Protocol, the Ministry of Industry, Entrepreneurship and Trade (MIET) has conducted a Study on Value Chain for the Textile, Apparel and Leather, whereas the study on the mineral non-metallic and chemistry industry value chains is ongoing. In addition, it has concluded and published the Annual Report on Industry development for 2020.
- To encourage the participation of women in education in Science, Technology, Engineer-

ing and Math, the Ministry of Education has awarded 812 scholarships for women studying STEM disciplines in public universities.

- Study on value chain for the textile, apparel and leather has been conducted. Studies of value chains for mineral non-metallic industry and chemistry industry are underway.
- Annual Report on Industry Development – Sector C 2020 has been conducted and published on the website of Ministry for Industry, Entrepreneurship and Trade.
- As regards green and circular economy and agri-food industry, the alignment with EU policies needs to be gradual, taking into account the domestic and regional circumstances and limitations. For substantial progress in those areas, considerable support is needed to offset the large upfront costs and help establish management and control systems.
- The Strategy and Action Plan for Integrated Waste Management 2021-2030 approved, including principles of the circular economy.
- In the context of the green energy transition, the District Heating with biomass in the city of Gjakova launched in November 2021 with 16.5 MW of heating capacity and a 1.1 MW power steam turbine.
- The Law on Trade in Petroleum Products and Renewable Fuels adopted from a legislative standpoint.
- Three bylaws adopted in the field of energy efficiency (primarily on Energy Efficiency Criteria for Regulating the Energy Grid and Transportation).
- Active participation in all activities of the WB Steering Platform and negotiation of the Joint

<sup>29</sup> October 2020 - mid-March 2021 first two groups (i.e. 500 young people) were trained in one of three different modules/programmes: Java Development, Cyber Security, or Web Development. Training of the third group is currently ongoing; expectations - 1,500 young people to be trained by the middle of 2023;

<sup>30</sup> Four different modules (Python, Network Administrator, Mobile Development, Digital Marketing) are expected to start by the end of 2021. Objective is to train about 2000 young people.

Declaration on a Western Balkans Agenda on Innovation, Research, Education, Culture, Youth and Sport, and participation in the Network of Open Access Research Infrastructure in the WB.

## 2.4 Montenegro

### Regional Trade Area

- Additional Protocol 6 on trade in services - ratified and published in Official Gazette No. 07/31.12.2021.
- Decision of the Joint Committee of the Central European Free Trade Agreement No. 1/2021 amending Annex 4 of the Central European Free Trade Agreement (CEFTA 2006), setting out the Protocol Concerning the Definition of the Concept of "Originating Products" and Methods of Administrative Cooperation referred to in Article 14, paragraphs 1 and 3, and repealing and replacing Decision No. 3/2013 and Decision 3/2015 of the Joint Committee of the Central European Free Trade Agreement was adopted in July 2021- internal procedure completed, and it is in the process of publication.
- CEFTA Decision on facilitating electronic commerce – The text of the Decision on the facilitation of electronic commerce (E-commerce) has been finalised, and the procedures for its adoption are underway.
- CEFTA Decision regarding professional qualifications - text decision agreed on technical level.
- CEFTA Decision work permits –under consultation.
- CEFTA Decision on facilitating trade provided by travel agencies and tour-operators - Progress has been made in the work of experts on the Decision on Facilitating Trade in Services Provided by Travel Agencies and Tour Operators.
- Draft decision on reducing trade costs – Montenegro submitted its position to the CEFTA Secretariat and CEFTA Parties on 11 June 2021 regarding the mentioned document - given that there are differing opinions on whether to discuss the Draft Decision on Reducing Trade Costs or not, Montenegro emphasised that its position is in line with Article 7 of Additional Protocol 5. The expected result of this activity should be primarily related to better access to information on fees and charges for companies and other stakeholders, while it is necessary to reduce the number and variety of fees and charges related to imports and exports of goods from each CEFTA party where possible, and at periodic intervals. Following the above, an updated version of the document was submitted by the CEFTA Secretariat, which the CEFTA Parties should comment on.
- A Time Release Study – The International Finance Corporation (IFC) provided technical assistance for the implementation of the Time Release Study (TRS) within the Trade Facilitation Project. Work is under progress.
- CEFTA Decision on enhancing cooperation on trade-related statistics- supported work on draft decision.
- Additional Protocol 7 on dispute settlement procedures - so far, 7 rounds of negotiations have been held. The continuation (7th round) is planned for the first quarter of 2022. Work is under progress.
- Montenegro supported CEFTA Decision on recognition of AEO programmes of North Macedonia, Serbia and Moldova.

## Investment Area

- Following internal consultations, representatives of the Montenegrin Investment Agency and the Ministry of Economic Development concluded on the importance of the metal processing and automotive sectors to whose regional promotion Montenegro could contribute.
- Process of preparing the Investment Incentives Inventory has been completed with a comprehensive review of the available governmental financial and non-financial support programmes intended for investors, in addition to the updated investment incentives.
- On regional investment policy reform, new BIT model adopted on 30 July 2021, which establishes a balance between the protection of investors' rights and state interests and full compliance with the EU standards and the best international practice. It defines five areas for reform actions: preserving the right to regulate while providing protection, reforming investment dispute settlement, promoting and facilitating investment, ensuring responsible investment and enhancing systemic consistency.
- On regional investment retention and expansion, the Government of Montenegro has adopted 3 programmes in total dedicated budget of 5,2mil€: Programme for improving the competitiveness of the economy of Montenegro (with 8 programme lines to further encourage investments, digital transformation of business, transition from a linear to a circular model of the economy, introduce international business standards, strengthen internationalization, as well as support business start-ups); Programme for Development of Processing Industry, and Programme for Craft Development. Public call was announced 15th March, and will be opened till 30th September 2022. Regarding the Programme 2021 results, there were 368 applications submitted, out of

which 202 were supported, in total amount of 1.153.015,01€.

## Digital Area

- Successful application under WBIF aimed at preparation of a fully-fledged study on broadband development.
- Proposal of the Law on the Use of Physical Infrastructure for the Installation of High-Speed Electronic Communication Networks defined.
- Roadmap for the establishment of 5G mobile networks is in progress - will be completed by the end of 2021.
- The auction of the radio frequency spectrum for 5G is in progress - will be completed by the end of 2021.
- Strategy on Digital Transformation 2022-2026 with the Action Plan 2022-2023 adopted.
- Strategy on Information Security 2022-2026 with the Action Plan 2022 adopted.
- Strategy for Digitisation of the Education System 2022-2027 with the Action Plan 2022-2023 adopted.
- Adopted Regulation on Information security - amending the Law.
- Amendments to the Law on Electronic Document adopted.
- Regulation on Personal Data Protection drafted.
- Information on establishing the Government Body on Cyber Security adopted.
- Open Data Portal <https://data.gov.me> redesigned.
- Platform for self-learning "Learning passport" prepared and expected to be launched by the end of 2021.

- Memorandum of understanding between the Ministry of public administration, digital society and media of Montenegro and the Ministry of Economic Affairs and Communications of Estonia on cooperation in the field of digital government signed.

### Industrial and Innovation Area

- According to Action plan for the implementation of the Strategy of Development of the Female Entrepreneurship 2021-2024, the Ministry of Education, Science, Culture and Sports is recognised as a partner in the activities regarding Creative industries sector. In line with this, support programme for the development of products/ services and capacity building of women-owned enterprises in the field of creative industries is envisaged to be organised during the month of December 2021.
- On green and circular economy value chains, in cooperation with UNECE through the project Evidence-Based Environmental Management and Sustainable Environmental Policies in Support of the 2030 Agenda in Southeast Europe, a package of documents on this topic has been developed, including three documents: Guide to greening public administration, Analysis of economic benefits of greening public administration of Montenegro and Greening of the commercial sector in Montenegro.
- Under UNECE assistance, a Guideline for greening the commercial sector, targeting the hotels, supermarkets, coffee shops and restaurants was developed, geared toward a circular economy and an improvement of waste management. In addition, Eco Fund was established with the purpose of financing and providing technical support to projects/programmes in the field of the environment, climate change and energy.
- Several programmes have been implemented with international partner organisations for achieving green investment, notably the Growing Green Business in Montenegro 2018-2021 project developed in co-operation with the United Nations Development Programme (UNDP).
- Pioneering steps have been made to offer financing mechanisms to SMEs, such as Programme Line for Fostering Circular Economy under the Programme for Enhancing Competitiveness.
- On Industrial Policy, Ministry of Economic Development adopted Action plan for Industrial policy implementation for 2021-2022 and also the Report on implementation its activities for 2020.
- Women's Entrepreneurship Development Strategy 2021-2025 with Action Plan 2021-2022 and the Report on the Implementation of the Action Plan for implementation of Strategy for Lifelong Entrepreneurial Learning for 2020 were adopted. In accordance with the process of implementation of the 2018-2022 Strategy for the Development of Micro, Small and Medium Enterprises, Government adopted the Report on the implementation of activities in support of MSME in 2020. Ongoing activities on creation and implementation of Programme for enhancement of competitiveness of economy are also complementary and in line with the main goal of strengthening the MSMEs sector with particular focus on the modernisation of production processes.
- The Ministry of Economic Development and the Investment Agency agreed on prioritising the metal processing and the automotive sectors for regional promotion. Mapping of companies operating in these sectors of the economy was conducted.
- New implementation framework for innovation and smart specialisation created.
- New Council for Innovation and Smart Specialisation established (June 2021).

- The Innovation Fund of Montenegro established (June 2021).
- The Programme for Innovation 2021-2024 adopted (all relevant programme lines for supporting innovation in one place covering innovation development cycle).
- The Operational Programme for Implementation of the Strategy of Smart Specialisation S3 2021-2024 with an Action Plan 2021-2022 created, currently in the process of public consultations and internal administrative procedures (to be adopted by the end of December 2021).
- Preconditions for implementation of the incentive measures for innovation (as of October 2021) created.
- New procedure related to the Register of Innovation Activity launched (October 2021).
- Programme line for early-stage development of start-ups launched for the first time (October 2021).
- On sustainable tourism, Montenegro aligned the Safe Travels Stamp protocols by WTTC and is implementing them.
- Additional Protocol 6 on trade in services- ratified.
- Decision of the Joint Committee of the Central European Free Trade Agreement No. 1/2021 amending Annex 4 of the Central European Free Trade Agreement (CEFTA 2006), setting out the Protocol Concerning the Definition of the Concept of Originating Products and Methods of Administrative Cooperation referred to in Article 14, paragraph 1 and 3, and repealing and replacing Decision No. 3/2013 and Decision 3/2015 of the Joint Committee of the Central European Free Trade Agreement was adopted in July 2021 - in procedure of ratification.
- CEFTA Decision on facilitating electronic commerce – adopted by the Government.
- CEFTA Decision on facilitating trade provided by travel agencies and tour-operators - under consultations.
- List of taxes and charges – done, reviewed on the meeting of National TFC, pending data from one institution; it will be submitted to the Ministry of Economy until end of the year.
- A Time Release Study – in process of work under project.
- CEFTA Decision on enhancing cooperation on trade-related statistics- supported work on draft decision.
- Framework for recognition of professional qualifications for 7 professions based on EU system for automatic recognition – Activity RCC-CEFTA: agreed on technical level.
- AEO validation procedure finished among North Macedonia, Serbia and Moldova; Protocol signed between customs authorities of North Macedonia and Serbia for mutual recognition of permissions for authorised economic operators.

## 2.5 North Macedonia

### Regional Trade Area

- CEFTA Decision regarding professional qualifications- (general system)- text decision agreed on technical level.
- CEFTA Decision work permits – under consultation (waiting for comments and proposals for amendments to the second draft of the Joint Committee Decision).

- On Free Movement of People, e-service for Recognition of Academic Qualifications and for Recognition of Vocational Education and Training (VET) established.
- Agreement between the European Union and North Macedonia on the participation of North Macedonia in Erasmus+: the Union programme for education, training, youth and sport signed.
- Agreement between the European Union and North Macedonia on the participation of North Macedonia in the European Solidarity Corps signed.

### Investment Area

- Data and information from regional promotional webpage ([www.investinsee.com](http://www.investinsee.com)) made available and public.
- Efforts have been invested to establish regular exchange of information between Investment Promotion Agencies, although the full potential is yet to be reached through a more proactive approach of Agencies.
- Required data and information on COVID-19 response measures taken by North Macedonia for possible mid- to long-term ISDS risks and other legal risks have been shared for the preparation of the Impact Study.
- Efforts have been invested to establish grievance mechanisms to support the investors in case they face difficulties through the functioning of Coordinative Body on open arbitration proceedings based on BITs on investments, open policy dialogue with investors for solving bottlenecks and issues, and through various forms of consultations, including but not limited to bilateral talks and Platform for Public Private Dialogue.

### Digital Area

- 4th NBCO Report on broadband development in accordance with DESI Methodology has been prepared and published; a decrease of white zones was reported, activities to conduct new mapping of existing and planned networks with a wide range of operators as well as activities to simplify procedures for construction and joint utilisation of networks were taken.
- On 5G readiness, a minimum value for one-time fee to obtain approval for use of 5G radio frequencies was approved and decision to announce a public bid for granting authorisations for the use of these frequency bands from the radio frequency bands 700 MHz and 3.x GHz was adopted.
- Assessment of the level of digital skills of teachers and private sector employees, supported by ITU is conducted and the data is currently being processed; National Platform for Digital Learning (NPDL) was developed and implemented<sup>31</sup>.
- National Population Register was updated with several machine learning features that makes this system to be the first Artificial Intelligent (AI) solution in the Government.
- An Operational Plan on Active Measures and Employment Programmes 2021 amounting to 1.5 million MK was adopted, aimed to support unemployed persons, youth, women, persons with disabilities who lost their jobs during the COVID crisis, and to ensure their return to the labour market<sup>32</sup>.
- Signed agreement to implement new infrastructure for hosting the National Population Register; number of new institutions and com-

<sup>31</sup> Platform includes extensive digital skills training of all teachers educating children from kindergarten to twelfth grades (K-12) in successful use of NPDL. In this regard, several dozens of digital tutorials for teacher training were designed and produced, including teaching digital materials for K-4 in several subject areas, i.e. Math, Natural sciences, History and society, and native Languages (Macedonian, Albanian, Turkish, Serbian and Bosnian)

<sup>32</sup> As a result, 400 unemployed persons within these categories completed digital skills trainings on various topics - [https://av.gov.mk/content/pdf/OP%20REVIDIRAN%20JULI%202021\\_%2028%207%202021.pdf](https://av.gov.mk/content/pdf/OP%20REVIDIRAN%20JULI%202021_%2028%207%202021.pdf)

panies using data from the National Population Register significantly increased.

- MasterCard started the service for remote digital identification aimed at services in private companies allowing that all documents signed with this service are done with a digital certificate of EU origin, using remote digital identification on a high level. Three new Single Point of Services centres have been launched in Kumanovo, Bitola and Ohrid.
- Continuous increase of datasets published on the Open Data portal - 24% increase is noted.
- Implemented electronic system for online lodging and monitoring of corruption reports; Launched implementation of e-Inspector system.
- Activities related to the establishment of National Competence Centre for HPC, HPDA, AI conducted; Massive open online courses for HPC, HPDA, AI created and workshops organised through collaboration between Academia and Industry; established support centre for HPC, HPDA, AI.
- 32 data protection trainings organised with participation of 704 persons.
- Preparation of the National ICT Strategy at final phase.
- Amendments to the Law on Electronic Communications adopted, envisaging new responsibilities for the regulator with regard to prior security approval for installation of 5G equipment by the telecom operators, in line with EU 5G Toolbox.

- Online training courses on cybersecurity for employees and managers held; two free courses are currently available on public website <https://lms.mkd-cirt.mk><sup>33</sup>.
- Several services developed (i.e. Web Application Scanning<sup>34</sup>, free service for adoption of advanced security technologies related to E-mail communication<sup>35</sup>, Cyber Responsible Organisation – free service with self-assessment questionnaire, for compliance of a company with cyber security baseline controls and measures); successful implementation of a short programme sponsored by USAID and designed to enhance the cyber security preparedness of North Macedonia's Critical Infrastructure and Key Resources.

### Industry and Innovation Area

- On regional innovation, progress in drafting the smart specialisation strategy, with the quantitative and qualitative phase is finished.
- 10 public calls for funding of innovative projects were conducted under the instruments for support and the thematic challenges of the Fund for Innovation and Technology Development.
- In supporting the development of the Western Balkans Innovation and Research Platform, pilot measures were implemented to support industry-academia cooperation: Innovation Vouchers and Challenge for Establishment of digital fabrication laboratories (Fab Labs) located in Higher Education Institutions (HEIs) grounded on quadruple helix model.

<sup>33</sup> First two weeks of December, around 400 people have been enrolled, out of whom more than 160 have completed at least one course

<sup>34</sup> <https://mkd-cirt.mk/usluga-za-proverka-na-veb-aplikacii/>

<sup>35</sup> <https://mailcheck.mkd-cirt.mk>

## 2.6 Serbia

### Regional Trade Area

- Serbia was the initiator and the first CEFTA Party to obtain the mandate and appoint delegation for the negotiations on the Additional Protocol 7 on Dispute Settlement. The status of the negotiations is ongoing, in the 7th round.
- Additional Protocol 6 on Trade in Services was ratified on 24 February 2020, which entered into force on 11 January 2021.
- Participation in all negotiation rounds on decisions on facilitation of E-commerce, on facilitating trade in services provided by travel agencies and tour operators, on recognition of professional qualifications and on removal of work permits.
- At the Joint Committee meeting on 21 June 2021, CEFTA Parties adopted Decision amending CEFTA rules of origin in accordance with the PEM Convention - Decision of the Joint Committee of the Central European Free Trade Agreement No. 1/2021 amending Annex 4 of the Central European Free Trade Agreement (CEFTA 2006), setting out the Protocol Concerning the Definition of the Concept of "Originating Products" and Methods of Administrative Cooperation referred to in Article 14, paragraphs 1 and 3, and repealing and replacing Decision No. 3/2013 and Decision 3/2015 of the Joint Committee of the Central European Free Trade Agreement. Serbia ratified this Decision, and it was published in the Official Gazette on 24 August 2021.
- Internal governmental procedures for the commencement of negotiations on Decision on reduction of trade costs were concluded on 1 July 2021. The Government has adopted Conclusion on accepting the basis for negotiations, and mandate of negotiating delegation.
- The initiative Green Corridors within CEFTA was launched in Serbia in April 2020 at the border crossing points Presevo, Sremska Raca, Gostun and the CCP Merdare for specific groups of goods that are entitled to prioritised passage and are agreed upon and confirmed regionally, at the CEFTA level. At the meeting of CEFTA Subcommittee on Customs and Origin of Goods held in March 2021, it was agreed to extend the implementation of Green Corridors to all road BCPs/CCPs within CEFTA (the implementation started in May 2021), and to certain railway crossing points (these crossing points in the Serbia are: Bijelo Polje as of 19 July 2021 and Presevo as of 14 October 2021).
- The road crossing points to connect Green Corridors of the EU and CEFTA were agreed upon and in Serbia they are: Batrovci, Horgos, Kelebija, Vatin and Gradina. The list of goods was also agreed.
- Working hours of the customs authorities have been harmonised.
- Integrated control at the BCP Presevo - Tabanovce has been established.
- Start exchanging data on average release times, including the methodologies used - Customs Administration conducted Time Release Study in 2017. The Study was conducted with the World Bank technical assistance and the usage of the WCO software. In accordance with the WCO recommendations, Time Release Study should be carried out every three years. In that respect, it was planned to carry out TRS in 2020, but due to COVID-19 pandemic, it was not conducted. The Study was conducted in Serbia in November 2021. The WCO software was used for this purpose, along with the World Bank technical assistance. When the Report is finalised, it will be publicly available on the Customs Administration website.
- Customs Administration has submitted a request to CEFTA for the validation of the Na-

tional AEOS Programme. The validation was conducted in February 2021 and positive feedback was received. Serbia completed internal procedure to adopt the Decision at the CEFTA Joint Committee, which will endorse AEOS Programmes of Serbia, North Macedonia and Moldova.

- Standard Operational Procedures for a common risk profile within CEFTA have been endorsed. Customs Administration of Serbia has participated in three joint customs actions within CEFTA, as follows: Control of empty vehicles (the action was initiated by the Customs Administration of North Macedonia and it lasted from 17 – 28 May 2021; the action was participated by: Albania, North Macedonia, Serbia and Montenegro. No irregularities were detected in the course of the action). Control of illicit trade in tobacco products (the action was initiated by the Customs Administration of Montenegro and it lasted from 08 – 15 June 2021; the action was participated by: Albania, Montenegro, North Macedonia, Bosnia and Herzegovina and Serbia. No irregularities were detected in the course of the action). Control of transit and import of textile products that infringe intellectual property right (the action was initiated by the Customs Administration of Serbia and it lasted from 21 – 26 June 2021; the action was participated by: Albania, Montenegro, North Macedonia, Bosnia and Herzegovina and Serbia. Three cases of irregularity were detected by the UCS and the products were detained).
- In phytosanitary area, activities performed in the previous period are with respect to the plan of activities, risk assessments, common list of fruits and vegetables for which the certificates are mandatory etc.
- The parties exchanged lists of registered operators, list of regulated pests with status, monitoring plans and pest specific surveys programmes, list of authorised laboratories. Serbia sent all these documents.

- Contact points have been designated for the SPS database, CEFTA TRACES NT.

## Digital Area

- Rural Broadband Rollout Project, aiming at development of broadband infrastructure in rural areas by connecting public institutions/schools to the mid-mile network and by incentivising the private sector to deploy last-mile infrastructure to surrounding households, is being successfully implemented; new application under WBIF for an investment grant and for technical assistance in Digital Infrastructure Sector was submitted.
- On 5G readiness, the frequency bands of interest for introduction and development of 5G are released and available, for this purpose, the radio frequency allotment plan for 700MHz band was adopted.
- Decision on the fulfilment of conditions for issuing individual licenses for the use of frequencies upon the completion of public bidding procedure for frequency bands 700MHz, 2500-2690MHz and 3400-3800MHz adopted.
- Rulebook on the application of fair use policy, on the methodology for assessing the sustainability of the abolition of retail roaming surcharges and on the application to be submitted by a roaming provider for the purposes of that assessment was adopted.
- New Law on Electronic Communications aiming at full alignment with EECC was drafted.
- Amendments to the Law on Electronic Document, Electronic Identification and Trust Services in Electronic Business, providing qualified trust services in electronic business by using the most advanced and cutting-edge technological solutions, were adopted.
- New Information Society and Information Security Strategy and its action plan adopted.

### 3. Key challenges in the first year of implementation

Progress has been made towards achieving key deliverables in 2021, particularly having in mind the post-pandemic environment, which continues to impose serious restrictions in terms of fully-fledged implementation of regional agendas. Nonetheless, the majority of regional actions planned for 2021 have either been concluded or progressed significantly, with some challenges identified as important to consider for the next year.

*Firstly*, despite good technical progress, the region was not able to conclude several important agreements related to CRM because of political bilateral and status issues. In some agendas, lack of commitment on the agreed political objectives is present, pushing therefore technical discussions to downsize the original ambition and resulting in limited benefits for citizens and businesses. The lack of political consensus on a number of regional agreements and initiatives, not least those encountered in the Free Movement of People area on the Freedom of Movement of People with ID and Freedom of Movement of Third-Party Citizens continues to pose a serious challenge to the implementation of CRM agenda and has a direct impact on the extent of the commitment to the process. In this regard, a strong commitment is needed by the entire WB region to conclude the relevant negotiations and implement agendas quickly. An aligned approach in communication on behalf of all stakeholders involved, including WB governments, regional organisations, private sector and European Commission is needed to maintain the momentum and be able to communicate properly the importance of CRM agenda that has

been demonstrated in ample occasions by the region's Leaders.

*Secondly*, the CRM agenda has put substantial burden on the WB administrations, testing their capacities to absorb intense and complex regional activities in timely and coordinated manner. Increased inter-linkages of CRM policy areas subsequently led to an increase of efforts in the implementation, which remains a challenge for the region's administrations. Very intense pace of implementation of CRM agenda at the regional level requires a whole-government approach in implementation, including internal coordination in each economy. Hence, continuous technical support is necessary at the economy level in order to increase relevant administrative capacities, including coordination capabilities. In addition, given that many regional organisations are involved in the implementation of CRM, there is a need for greater synergies and agile coordination mechanisms and framework. The communication between the private-sector led established mechanisms and those at the level of WB institutions should also be improved for the sake of transparent exchange of information and regular update on the progress.

*Thirdly*, great number of initiatives have been focused on harmonisation based on the coordinated approach to harmonisation with the EU acquis. This has not only generated demand for stronger support to the administration in both discussions and implementation, but also revealed that WB administrations find themselves at different stages of EU acquis alignment, which is another challenging aspect when implementing regional agendas. In this regard, stronger participation of line Director-

ate Generals in the European Commission would significantly facilitate and accelerate the process of agreement-making within the region, by providing expertise and guidance on adapting to EU mechanisms and regulatory framework.

Last but not least, the slower pace of implementation of certain CRM agendas is also the result of the ambitiousness of CRM initiatives as such, with some being heavy in capital investments (broadband development, interoperability, etc.). The EC commitment to support CRM through its Economic and Investment Plan (EIP), which provides up to €9 billion for the region's economic integration, is clearly positive in this regard. The EIP's full effect is conditioned on successful regional economic

integration efforts. If the CRM AP would be implemented, it could bring an additional 6.7% GDP growth to the region, which makes investment to this regional agenda cost-effective. The RCC and CEFTA Secretariats continue to seek ways to align the needs of CRM agendas and match them with existing financial opportunities through CRM Donor Coordination meeting (the 1st Donor Coordination meeting on CRM agenda was held in May, 2021), including through sectoral/topical donor coordination meetings, as the need arises. This will, among others, yield the development of more concrete projects that will support and give additional pace to the implementation of CRM activities at both the regional level and the level of each economy.

## 4. Conclusions and next steps

The CRM agenda has seized the opportunity and used the existing potential of regional mechanisms, bodies and working groups for the implementation of actions across CRM policy areas at the regional level. Due to its ambitiousness and wide scope, the coordination in the implementation of CRM agenda, however, became more complex and demanding. Depending on CRM policy area and pursued regional initiatives, the region should use more the opportunity of liaising with different stakeholders outside the CRM agenda that have both high interest and capacities to engage in and facilitate the implementation of regional activities (e.g. universities and research institutions).

Whenever regional agendas allow, the focus should also be devoted to practical initiatives and projects that encourage the advancement and growth of regional capacities, be it through targeting small projects, supporting and encouraging development of early-stage initiatives. It is also highly advisable that the region focuses on dynamic information and knowledge exchange on a number of regional initiatives, not only those directly related to the implementation of CRM agenda.

The cross-cutting element of CRM agenda allows for ongoing exchange of information in areas that are indirectly connected to the regional initiatives stipulated in the Action Plan. The valuable exchange of information should be continued through existing regional mechanisms and working groups since this has proven to be an efficient channel of communication at the regional level.

The political commitment and the region's determination remains essential for further advancements along CRM policy areas. Throughout the implementation of regional activities in CRM respective areas, the political commitment, strate-

gic guidance of WB as well as readiness to reach consensus can greatly affect the pace of implementation of regional initiatives in 2022. With a view of avoiding any stumbling blocks related, but not limited to the agreements under Free Movement of People, the political determination remains one of the most important elements for the success of this agenda.

To conclude, as shown throughout this report, implementation of CRM Action Plan has started and progressed to different extents, regarding the components of CRM policy areas. More pronounced results were achieved in cross-cutting regional trade area, regional digital and investment area, whereas in some other areas, the ground was laid for the concrete results in 2022, the second year of CRM implementation.



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