

jOiNEd For sUsTainability - bUilding climate REsilient communities in WB and EU

T2.4: Report on survey and interviews with public and private institutions, business communities and other stakeholders

IUAV Project meeting
University of Tuzla

Date: April 18th, 2024
Place: Venice, Italy



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PART I: Business sector survey

- Data collection process info:
 - Conducted 2023-2024 and lasted for three months in Albania;
 - Started in November 2023 and ended by the end of year 2023 in Bosnia and Herzegovina and
 - Montenegro data collection process took place in two rounds: October-November 2023 and January-February 2024 and lasted until 19th February 2024
- Research included 901 companies from the Western Balkans:
 - Albania: 478
 - Bosnia and Herzegovina: 207
 - Montenegro: 216





Comparison Across Countries

- Survey Methodology
- Participating Businesses
- Drivers of Green Practices





Comparison of Survey Methodology

- Quota sampling technique in Albania, goal to comprise at least 0.5% of companies from each sector (achieved)
- In Bosnia and Herzegovina and Montenegro stratified sampling technique (had rather unequal distribution across sectors – some as low as 0.05% in MNE or 0.1% in B&H)
- Albania: live by face to face interviews; in Montenegro online survey - using Google Form; in Bosnia and Herzegovina in both ways (hybrid) depending on respondents' preferences
- Territorial distribution:
 - More than 90% of the participating companies from Albania were in the capital, Tirana
 - Most of the 10 cantons in the Federation of Bosnia and Herzegovina. The majority of companies headquarters (many facilities as well) are located in Lukavac (20%), Sarajevo (13%) and Tuzla (10%).
 - More than 54% of the responses in Montenegro were obtained from companies headquartered in Podgorica - the capital, slightly more than 10% from companies based in Niksic, and around 7% from companies based in Bar



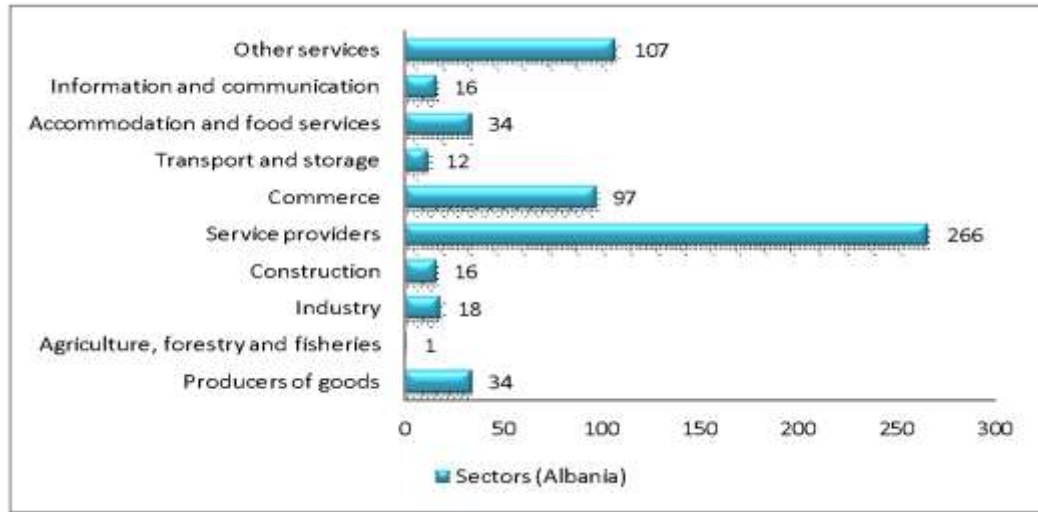
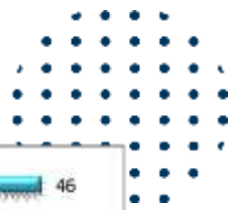


Figure 1 Number of companies by sectors partaking in study in Albania

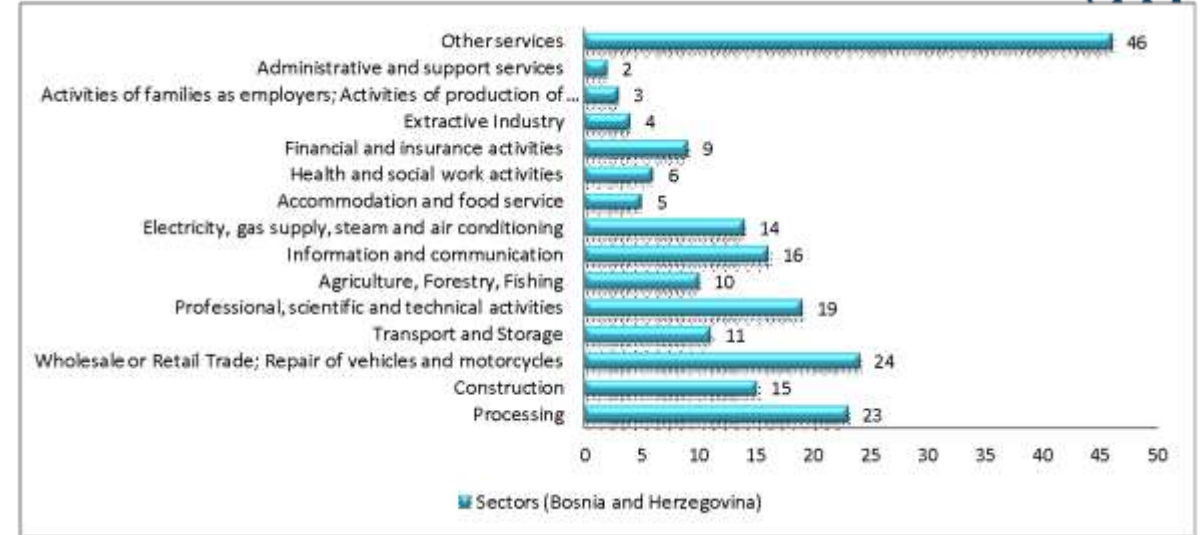


Figure 2 Number of companies by sectors partaking in study in Bosnia and Herzegovina

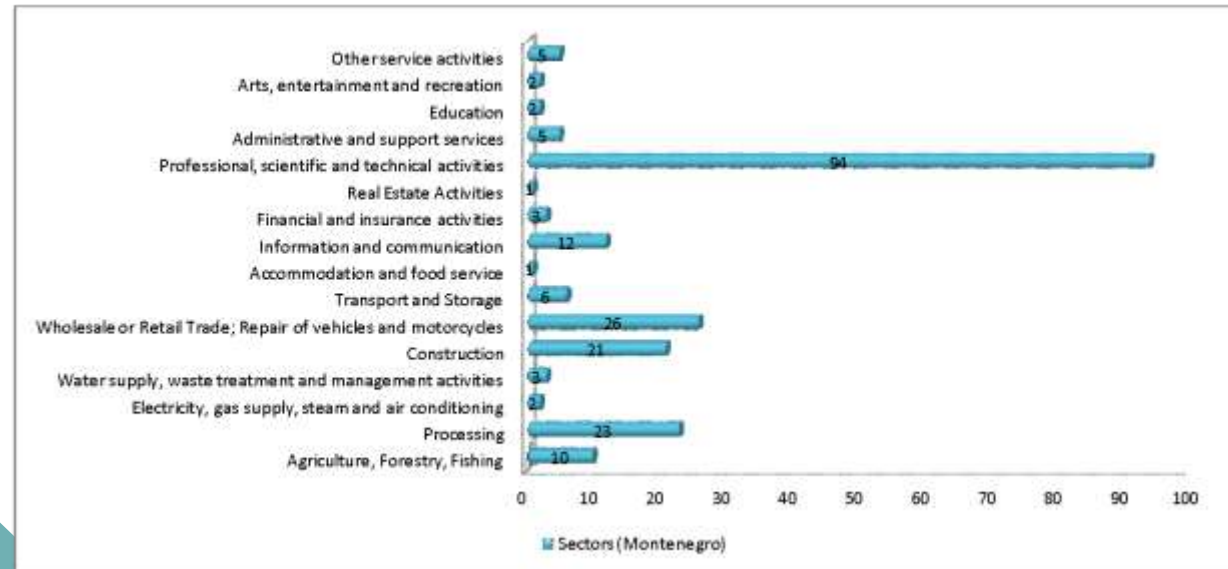


Figure 3 Number of companies by sectors partaking in study in Montenegro





Comparison of Participating Businesses

- In all three WB countries companies ranged in size from micro to large
- different legal formulations of companies in terms of size - determined by the incomes, income taxes, number of employees, etc.
- Prevailing legal status of companies was limited liability



Main characteristics of study sample (N=478) (Albania)

<i>Variables</i>	<i>Descriptive statistics</i>
Average years in operation	12.92
Average number of employees per company	74.22
Female-led companies	102 (20%)
Legal status/form of company	limited liability 236 (49%)
	joint stock 48 (10%)
	small businesses 194 (40%)
Size of company	large 277 (55%)*
	small & medium 222 (45%)

Main characteristics of study sample (N=207) (Bosnia and Herzegovina)

<i>Variables</i>	<i>Descriptive statistics</i>
Average years in operation	22.74
Average number of employees per company	210.6
Female-led companies	22 (10.6%)
Legal status/form of company	limited liability 126 (60 %)
	unincorporated business 6 (3.5%)
	corporation 20 (7%)
	other (small business) 55 (26.5%)
Size of company	large 35 (16.9 %)
	medium 34 (16.4%)
	small & micro 114 (55 %)
	not applicable 24 (11.6%)

Main characteristics of study sample (N=216) (Montenegro)

<i>Variables</i>	<i>Descriptive statistics</i>
Average years in operation	15 (STD=14)
Average number of employees per company	21,42 (STD 67.37)
Female-led companies	53 (24.57 %)
Legal status/form of company *	small businesses (Unincorporated business) 7 (3,2%)
	limited liability 196 (90,7 %)
	joint stock (Corporation?) 6 (2,8 %)
	Other 7 (3,2%)
Size of company **	Micro 163 (75,5%)
	Small 41 (19,0%)
	Medium 6 (2,8%)
	Large 6 (2,8%)





Figure 4 Percentage of LLC companies and large companies that participated in study

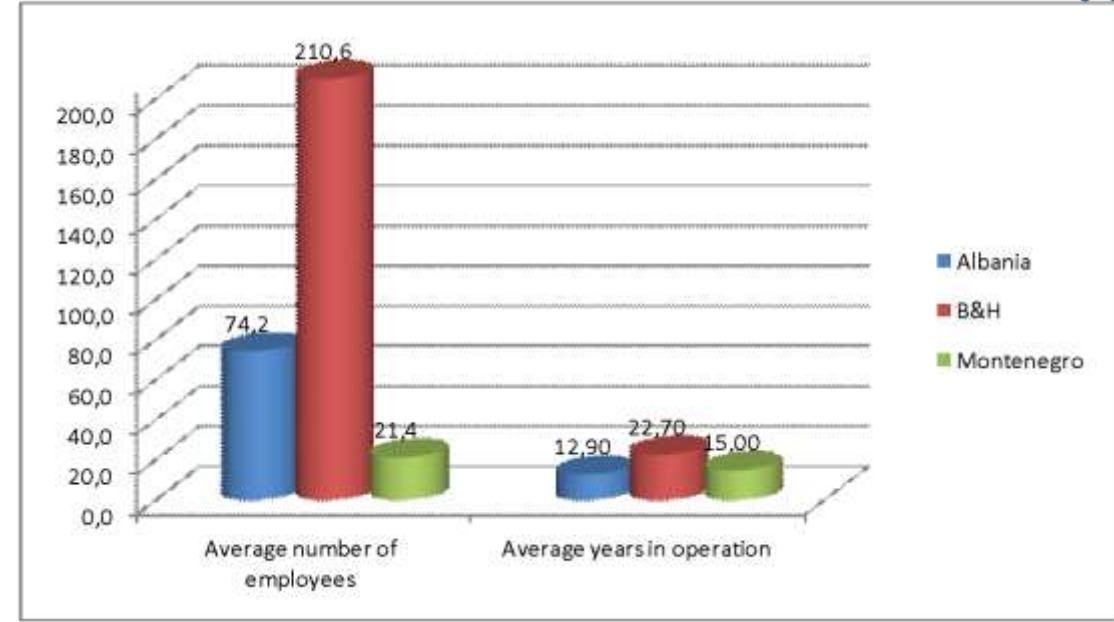


Figure 5 Average years in operation and average number of employees

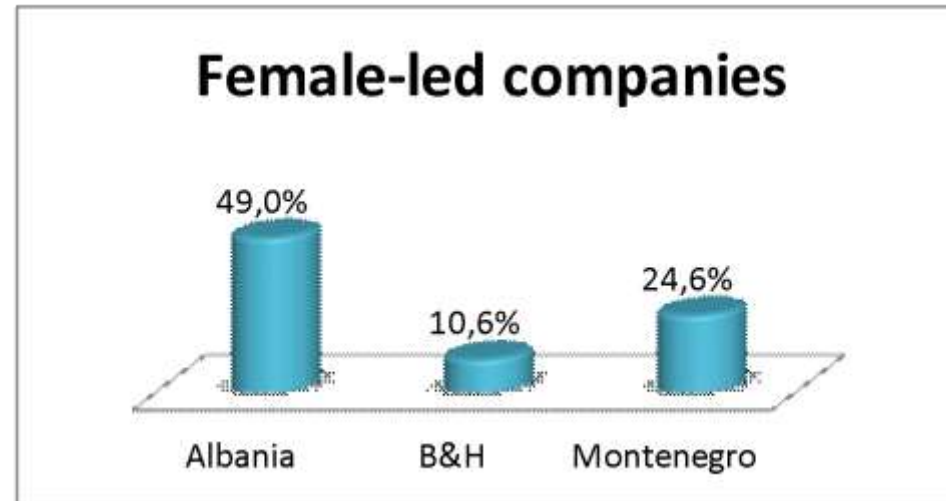


Figure 6 Percentage of female led companies





Comparison of Drivers of Green Practices

Table 13 Adoption of green businesses measures by all and large companies (top rated)

Country and company size	Green business measures	Level of adoption
Albania - all companies	Implement measures to protect the environment	56.3%
	Estimate the level of energy consumption/savings/losses	67.1%
	Implement measures to reduce pollution	81%
Albania - large companies	Estimate the quantity of solid waste discharged	70,8%
	Have a green transport plan/procedure (for staff, customers, freight)	72%
	Have adopted a national/international environmental certification program	79,1%
B&H - all companies	Engage in community-based environmental initiatives	44.4%
	Estimate the level of energy consumption/savings/losses	49.3%
	Implement measures to reduce pollution	64.7%
B&H - large companies	Implement measures to reduce pollution	60%
	Send delegates to environmental conferences/activities; Estimate the level of energy consumption/savings/losses	62.8%
	Engage in community-based environmental initiatives	65.7%
Montenegro - all companies	Engage in community-based environmental initiatives	52. 8%
	Implement measures to reduce pollution	75.5%
	Implement measures to protect the environment	81.9%
Montenegro - large companies	Have a detailed plan to reduce the environmental impacts; Designate an employee/team/structure for environmental management; Conduct environmental management training for staff; Engage in community-based environmental initiatives; Inform customers about their environmental effects; Implement measures to protect the environment; Implement measures to reduce pollution	100%





- Large companies in three surveyed countries of the Western Balkans mainly differ in adopted green practices. There are only a few common measures such as engagement in community activities and measures to reduce pollution.
- High percentage of green measures adopted by large companies (100%) in Montenegro - due to fact that only 6 large companies participated in the study.



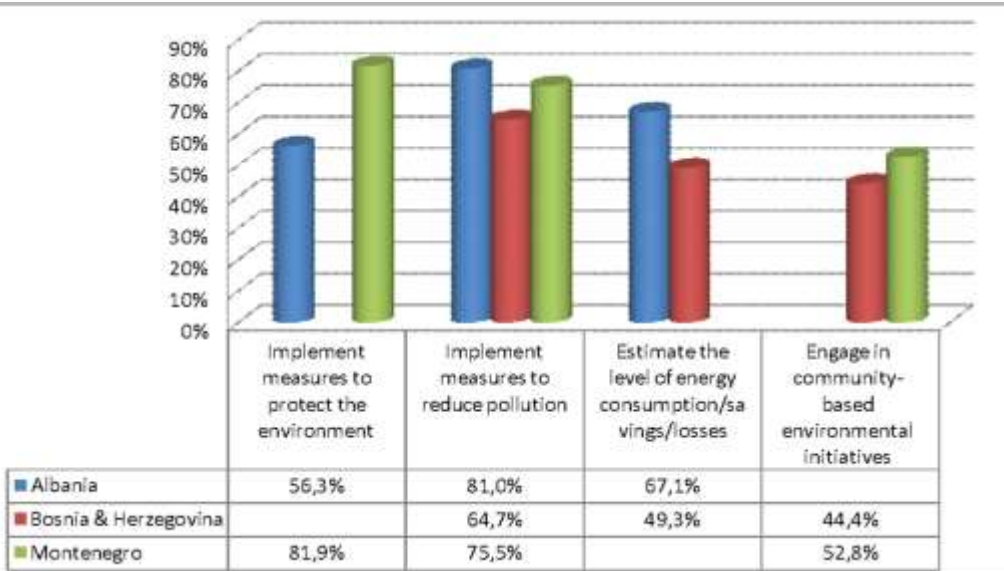


Figure 7 Green measures adoption across WB countries (all companies)

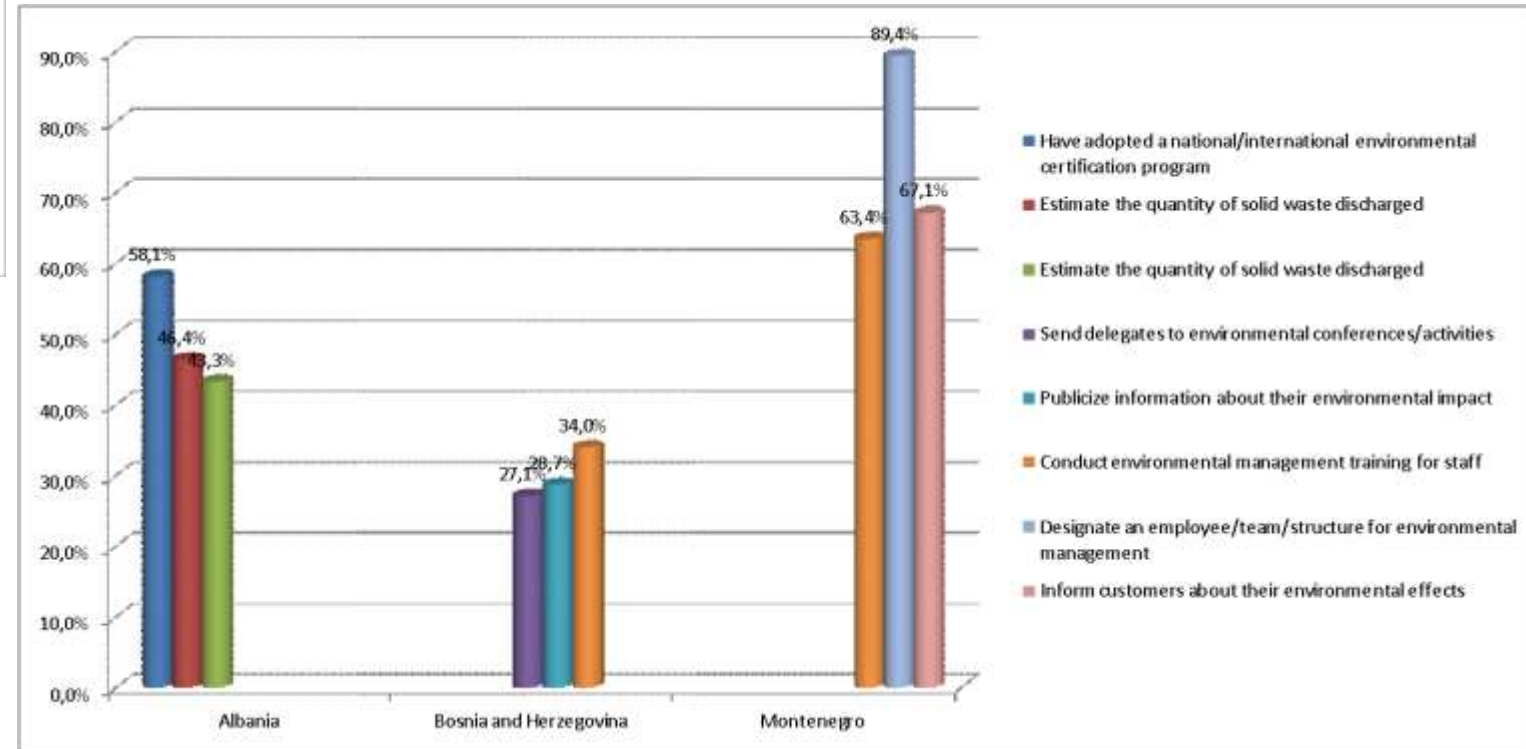


Figure 8 Gap among large and all companies in green measures adoption (top rated)





Views on green business practice

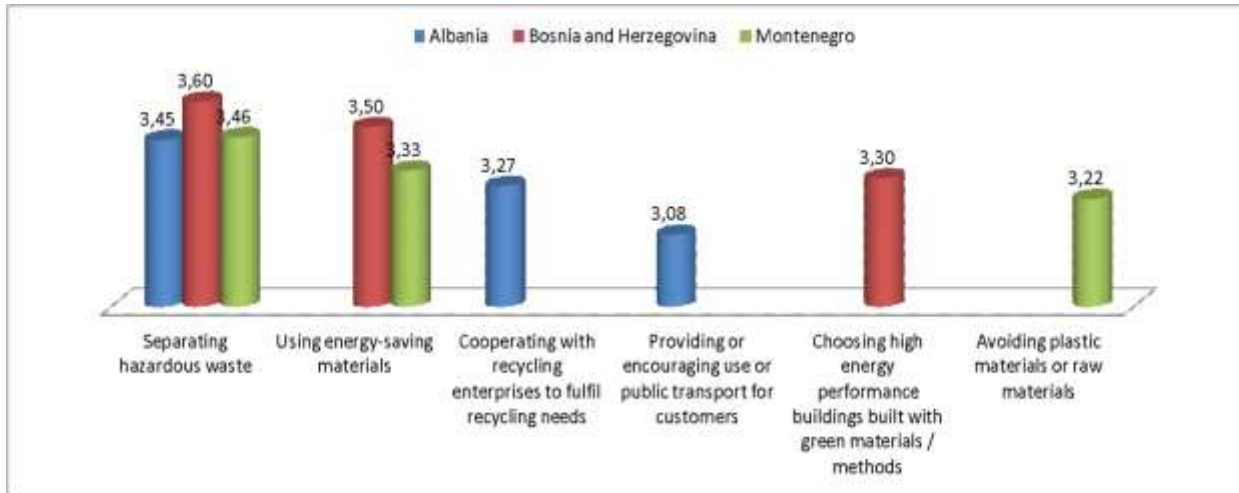


Figure 9 Company representatives' views on green business practices (top rated)

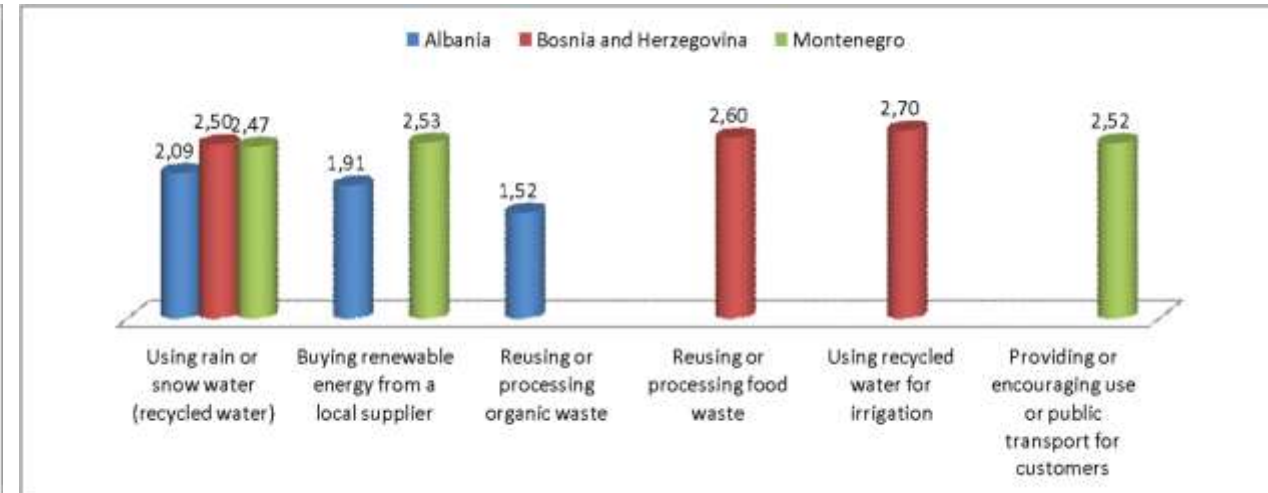


Figure 10 Company representatives' views on green business practices (least rated)

Likert Scale: 1 (unimportant) to 4 (very important)

Albania: little interest is shown in measures such as reusing or processing organic waste, buying renewable energy from local suppliers, and collecting and reusing rain or snow water.

The lowest score is in Bosnia and Herzegovina is in using rain or snow water (recycled water) or using recycled water for irrigation as well as reusing or processing food waste and organic waste.

Montenegro measures in the field of energy are the least commonly implemented.

The reason for such responder's views on the importance of measures "for achieving the environmental goals of your entity" lies in the fact that not all measures are inherently applicable to all types of business.



PART II:



Interviews with public sector

- Purpose: disseminating information about the Project, determining the drivers and obstacles encountered in the implementation of green practices, researching the willingness of institutions to cooperate with academia in implementation of actions in the field of climate and sustainability
- 20 interviews were conducted in both Albania and Bosnia and Herzegovina and total of 19 in Montenegro
- Included many institutions at the state and local level:
 - state administration bodies, national agencies, local government bodies,
 - educational (elementary and secondary schools, universities),
 - health care,
 - cultural institutions and
 - international organizations





Common drivers (all 3 countries)

Related to international commitments and process of full **transposition of European legislation** during the EU accession process and the existing **United Nations conventions/protocols**

Environmental concerns and **raising awareness** about environmental protection as well as **economic incentives** and **benefits** associated with implementing sustainable practices, such as **cost savings**, **access to international markets**, and **attracting investment** is emphasized as other important drivers in common.

Important drivers for all are **adopted laws, regulation, policies, strategies** and **action plans** as they play crucial role in driving sustainability initiatives





Important common barriers (3 WB countries)



budgetary constraints and **lack of financial resources**, complex **bureaucratic procedures** (emphasized public procurement procedures)



overlapping of tasks in different institutions



lack of institutional knowledge and skills related to climate change (at a national and local levels)



lack of capacities and human resources in public institutions (**lack of trained staff and lack of necessary expertise**)



very important issue: **low level of law enforcement** and non-implementation of legal obligations





Most common pattern

an approach to the implementation of sustainability practices that is **primarily driven by the formulation of laws and regulations** aimed at promoting such practices

In terms of funding, activities **often rely heavily on donor support or assistance from international organizations**





Overall recommendations

- Identified need for:
 - stronger political commitment,
 - further strengthening of technical and institutional capacities in this area,
 - stakeholder collaboration and promotion of personal responsibility for sustainability.





Conclusion – business sector research

Companies in three WB countries, particularly larger ones, have started to adopt certain green business

Most of them will disregard environmental issues or only implement the least expensive ones

Reason for not implementing some measures: besides the specificity of certain activities, also lies in the insufficient understanding of their importance for environmental preservation and sustainability

It is necessary to continuously educate the public and decision-makers





Conclusion – interviews with public sector

There are **no plans or strategies** to address climate change and sustainability issues within many institutions

Main barriers for sustainability action are related to **deficiencies** in inter-institutional **coordination**, low **budgeting**, **lack of experts**, and **awareness** and **education** of citizens on these issues

There are **no platforms** to enable cooperation and to support institutions to implement sustainability practices





Conclusion

Research confirmed willingness of companies and public institutions to collaborate with HEIs in implementing climate and sustainability actions

Results and findings will serve as solid basis for conceiving Collaboration Platform (part of WP3) as well as inputs for curricula revision, creation of short intensive courses and learning materials within WP4





Thank you for your attention

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