

OVERVIEW AND OVERALL ASSESSMENT OF THE IMPLEMENTATION OF NALED STRATEGIC PLAN 2022-2025/26

The NALED Strategic Plan for the 2022–2025/26 period defined 12 program objectives, grouped into two strategic areas: Improvement of Public Policies and Services, and Promotion of Territorial Development and EU Integration. These objectives provided a stable reform framework for NALED’s work throughout the entire four-year period, while specific activities and results were adapted to changes in the institutional environment, public policy priorities, the needs of businesses and citizens, as well as the availability of partner and donor resources.

For this reason, the final assessment of the Strategic Plan implementation is not viewed solely through the execution of individual activities, but primarily through the level of achievement of the program objectives – namely, the extent to which NALED contributed to tangible reform progress in the areas of regulatory reform, reduction of Shadow Economy, public finance, digitalization, entrepreneurship, investments and construction, agriculture, healthcare, the green agenda, local development, regional cooperation, and EU integration.

During the four years of Strategic Plan implementation, the program objectives were largely achieved. A total of 80% of activities were fully or partially implemented, while 6% were not realized and 14% were postponed to the next strategic period. The highest level of achievement was recorded in the areas related to public finance improvement, business EU integration and regional cooperation, development of eGovernment and eBusiness, enhancement of regulatory quality, and the fight against Shadow Economy. In these areas, NALED delivered the most visible systemic progress through a combination of analytical work, public-private dialogue, reform advocacy, and direct technical support to institutions. At the same time, objectives related to the green agenda, agriculture and food industry, and local development were achieved to a somewhat lesser extent. This does not indicate a lack of reform relevance of these topics, but rather their greater dependence on broader institutional consensus, long-term financing, intersectoral coordination, and the readiness of competent institutions to translate initiated reforms into regulations and practice.

Overall, the implementation of the Strategic Plan confirms that, during the 2022–2025/26 period, NALED maintained continuity of action across all 12 program areas, with the greatest impact achieved where clear reform priorities, active member support, institutional openness, and available partner resources aligned. Such results provide a strong foundation for the next strategic cycle, in which the focus should be placed on deepening the reforms already achieved, transferring successful models to new areas, and strengthening objectives whose implementation requires a longer-term horizon.

Statistics on the Implementation of Program Objectives

Below is an overview of the achievements under each of the 12 program objectives, with a focus on the extent to which the planned reform directions were advanced during the strategic period. The assessment is based on the final implementation review, with percentages used as a reference point for comparing the level of achievement across objectives, rather than as the sole indicator of their significance.

For each objective, the level of achievement, NALED's key contributions, and the areas requiring further efforts in the next strategic cycle are presented.

Program Objective 1: Improved Quality and Regulatory Process of Legislation

Status	Achieved	Partially Achieved	Not Achieved	Postponed	Implemented Outside Plan	Total
Number of Activities	9	1	0	1	0	11
Share	82%	9%	0%	9%	0%	100%

Level of Achievement: 90,9%

The objective was achieved to a very high degree, reaffirming NALED's role as one of the key institutional partners in improving the regulatory framework. During the strategic period, progress was reflected through continuous regulatory monitoring, the Regulatory Index of Serbia, regular publication of the Grey Book, preparation of analytical reports, and active participation in working groups for drafting legislation. In the next cycle, it will remain important to further strengthen institutional dialogue and increase the use of analytical data in public policy development.

Program Objective 2: Reduced Shadow Economy

Status	Achieved	Partially Achieved	Not Achieved	Postponed	Implemented Outside Plan	Total
Number of Activities	9	3	3	2	0	17
Share	53%	17,6%	17,6%	11,8%	0%	100%

Level of Achievement: 70,6%

Significant progress was achieved in the area of countering shadow economy, with NALED making a key contribution through support to the implementation of the Program for Suppression of Grey Economy, participation in the work of the Coordination Body and Expert Group, as well as through campaigns and projects that brought the importance of legal business operations closer to citizens and businesses – from the "Take a Receipt and Win" prize game to

increasing the availability of cashless payments and introducing POS terminals in the SME sector. Slower progress in the areas of inspection oversight, eInspector, and certain labour law reforms indicates that countering shadow economy remains a long-term priority.

Program Objective 3: Improved Public Finance System

Status	Achieved	Partially Achieved	Not Achieved	Postponed	Implemented Outside Plan	Total
Number of Activities	9	4	0	0	1	14
Share	64,3%	28,6%	0%	0%	7,1%	100%

Level of Achievement: 100%

Public finance represents one of the most successfully implemented program areas, with all planned results being partially or fully achieved. Through its projects, NALED contributed to the improvement of public procurement, invoicing, the tax system, and the reform of parafiscal charges, combining analytical work, public-private dialogue, and practical support to system users. Particularly important results were achieved in strengthening the capacities of contracting authorities and bidders, introducing green and social criteria into public procurement, and digitalizing the payment of fees and charges.

Program Objective 4: Improved Conditions for the Development of eGovernment and eBusiness

Status	Achieved	Partially Achieved	Not Achieved	Postponed	Implemented Outside Plan	Total
Number of Activities	14	3	0	1	0	18
Share	77,8%	16,7%	0%	5,5%	0%	100%

Level of Achievement: 94,4%

The digitalization of public administration and business operations was achieved to a very high degree and confirmed as one of NALED's most visible reform directions. NALED made a significant contribution to the development of digital public services, electronic documents, electronic identification, ePayments, 5G infrastructure, broadband internet, and smart cities. The increased use of digital services demonstrates that these reforms had a direct impact on citizens, businesses, and public administration.

Program Objective 5: Improved Conditions for Entrepreneurship and Innovation

Status	Achieved	Partially Achieved	Not Achieved	Postponed	Implemented Outside Plan	Total
Number of Activities	18	5	3	2	1	29
Share	62,1%	17,2%	10,3%	6,9%	3,5%	100%

Level of Achievement: 82,8%

Support for entrepreneurship and innovation was achieved to a high degree through a combination of regulatory initiatives, grants, advisory support, and the networking of small businesses, startups, academia, and large companies. Particularly notable were the StarTech and Small and Powerful grant Programs, support for social entrepreneurship, freelancers and lump-sum entrepreneurs, as well as the establishment of the Small Business Council. In the next period, additional efforts are needed to further institutionalize support for small businesses and the innovation ecosystem, particularly for women entrepreneurs.

Program Objective 6: Improved Conditions for Investment and Construction

Status	Achieved	Partially Achieved	Not Achieved	Postponed	Implemented Outside Plan	Total
Number of Activities	3	3	1	0	3	10
Share	30%	30%	10%	0%	30%	100%

Level of Achievement: 90%

Conditions for investment and construction were improved to a high degree, particularly in areas that became reform priorities during the strategic period: property rights, cadastre, legalization, and the activation of construction land. Through analyses, recommendations, and participation in the drafting of regulations, NALED contributed to creating conditions for easier property registration, resolving the legal status of real estate, and removing barriers to investment. This area also demonstrates the organization’s ability to adapt its strategic direction to emerging reform priorities.

Program Objective 7: Improved Conditions for the Development of Agriculture and the Food Industry

Status	Achieved	Partially Achieved	Not Achieved	Postponed	Implemented Outside Plan	Total
Number of Activities	3	2	1	3	2	11
Share	27,3%	18,2%	9%	27,3%	18,2%	100%

Level of Achievement: 63,6%

Activities in the field of agriculture and the food industry achieved a moderate level of implementation, while also opening important development topics during the strategic period – regenerative agriculture, food innovation, digitalization, and the connection between producers, researchers, and businesses. Through its role as the EIT Food Hub, NALED contributed to strengthening the sector’s innovation potential. The lower level of achievement indicates that systemic changes require a more stable institutional framework, longer-term financing, and stronger alignment between sectoral policies and the needs of producers.

Program Objective 8: Improved Healthcare Services and Access to Medicines

Status	Achieved	Partially Achieved	Not Achieved	Postponed	Implemented Outside Plan	Total
Number of Activities	3	5	1	2	2	13
Share	23%	38,5%	7,7%	15,4%	15,4%	100%

Level of Achievement: 76,9%

The objective was achieved to a significant extent, with important but still only partially completed progress. During the strategic period, NALED contributed to the digitalization of healthcare procedures, the development of eSick Leave and eHealth Records, improved access to medicines, and the formulation of recommendations through the Grey Book of Healthcare. The high share of partially achieved results indicates that key reforms have been initiated, but that their full implementation depends on further institutional efforts, accompanying regulations, and the operational integration of digital solutions.

Program Objective 9: Supported Implementation of the Green Agenda

Status	Achieved	Partially Achieved	Not Achieved	Postponed	Implemented Outside Plan	Total
Number of Activities	5	4	0	7	0	16
Share	31,3%	25%	0%	43,7%	0%	100%

Level of Achievement: 56,3%

Support for the implementation of the Green Agenda was achieved to a moderate degree, confirming that this is an important yet complex reform area. NALED contributed to opening discussions on the circular economy, green public procurement, decarbonization, CBAM, sustainable energy, and waste management. The higher number of postponed results indicates that, in the next cycle, this area should be positioned more strategically as a horizontal theme linked to business competitiveness, EU integration, exports, and local development.

Program Objective 10: Improved Conditions for Local Economic Development

Status	Achieved	Partially Achieved	Not Achieved	Postponed	Implemented Outside Plan	Total
Number of Activities	3	0	1	1	0	5
Share	60%	18%	20%	20%	0%	100%

Level of Achievement: 60%

Local economic development progressed to a moderate degree, primarily through strengthening the capacities of local self-governments, providing training, facilitating the exchange of best practices, and supporting the implementation of reforms at the local level. NALED maintained an important role in connecting national reforms with local administrations, particularly in the areas of digitalization, public procurement, property registration, information security, and smart cities. Achieving a greater impact in the next period will require more stable support Programs for cities and municipalities, as well as more clearly measurable results for local economies.

Program Objective 11: Improved and Harmonized Business Conditions in the WB Region

Status	Achieved	Partially Achieved	Not Achieved	Postponed	Implemented Outside Plan	Total
Number of Activities	6	1	0	0	0	7
Share	85,7%	14,3%	0%	0%	0%	100%

Level of Achievement: 100%

Regional cooperation was fully implemented, confirming NALED’s credibility as a promoter of reform standards beyond Serbia. Through the BFC SEE Program, the CORE partnership, regional projects, conferences, and the exchange of best practices, NALED contributed to the harmonization of business conditions across the Western Balkans. This area represents a strong foundation for further positioning the organization as a regional knowledge hub for business environment reforms.

Program Objective 12: Improved EU Integration Process in Areas Relevant to the Economy

Status	Achieved	Partially Achieved	Not Achieved	Postponed	Implemented Outside Plan	Total
Number of Activities	6	1	0	2	0	9
Share	66,7%	11,1%	0%	22,2%	0%	100%

Level of Achievement: 77,8%

Activities supporting EU integration were achieved to a significant degree through linking the accession process with concrete reforms relevant to the economy – ranging from the tax and regulatory framework to competitiveness, innovation, ESG standards, and the digital and green transition. NALED also contributed through the National Convention on the EU, recommendations for the European Commission reports, monitoring of the Reform Agenda, study visits, training Programs, and the introduction of the EU badge for relevant recommendations in the new editions of the Grey Book. In the next period, it will be necessary to further strengthen support to institutions and local self-governments in implementing obligations stemming from the Reform Agenda and the EU accession process.

Support from Members and Donors

During the 2022–2025 period, NALED maintained a stable level of activity with around 130 implemented projects, financed through a combination of direct contracts and public calls, alongside 115 submitted applications in an increasingly competitive environment. The total value of projects amounted to approximately EUR 40 million, with grants accounting for the majority of funding (82%). Funds were primarily directed towards entrepreneurship and innovation (32%), international competitiveness and ESG (15%), public finance (15%), as well as eGovernment and eBusiness (10%). Funding was concentrated among several key donors, primarily Sida (30.7%) and PMI (30.2%), with a significant contribution from GIZ (13.8%) and the European Union (8.1%), which stands out for the breadth of its support across program objectives. The funding structure indicates a predominant reliance on international sources (64%), alongside a significant share of private sector support (35%), while public funding played a marginal role (1%).

The number of members from the private, public, and civil sectors ranged between 300 and 360, with membership fees accounting for approximately 15% of the organization's funding. Members were engaged through NALED's governing and program bodies – over the past four years, **six alliances** were active in the areas of fair competition, eGovernment, environment, healthcare, property and investments, food and agriculture, as well as **the BFC Club of municipalities and cities** with a favorable business environment. In addition, **two new expert bodies were established** – the Small Business Council and the Sustainable Energy Council.

Analytical and Expert Support to Reforms

NALED reaffirmed its role as a leading think tank in Serbia through the preparation of more than **130 policy analyses**, the implementation of which directly shaped key reform processes. Our analytical contribution covered a wide range of areas – from systemic solutions for **countering shadow economy** and **legalization of buildings**, to laying the groundwork for the introduction of a **digital wallet** and **the expansion of broadband infrastructure**. A particularly notable success was achieved in the fields of energy and innovation, where recommendations aimed at **improving the position of prosumers and simplifying cross-border procedures for R&D** were directly integrated into new legislative frameworks, enabling faster technological development and energy transition.

NALED's "regulatory bible" – **the Grey Book**, with its 100 business recommendations, remained the central pillar of dialogue with the Government, while the specialized **Grey Book of Innovation**, through three editions, enabled the implementation of more than 15 key recommendations. Continuous monitoring was ensured through **quarterly reports on regulatory activity** and **the Regulatory Index of Serbia (RIS)**, which provides a unique insight into the quality of the legislative process. In addition, the establishment of the first **Local eGovernment Index (LEI)** and the regular monitoring of eConstruction Permit statistics provided decision-makers with insight into the real effects of digitalization at the local level.

NALED confirmed its role as a key strategic partner of the Government of the Republic of Serbia through **direct participation in the drafting of overarching national documents** defining the country's development direction until 2030. Expert support played a crucial role in the development of the new Program for Countering Shadow Economy, laying the foundations for a more stable and predictable business environment. In the field of digital and technological transformation, NALED made a decisive contribution to the development of the Artificial Intelligence Development Strategy (2025–2030), the Action Plan for Information Security, as well as the strategic framework for the development of electronic communications. A particularly significant contribution was achieved in sectoral policies through the Action Plan for Healthcare Digitalization, the first Circular Economy Development Program, and new ten-year strategies in the areas of agriculture and rural development and mineral resources management, thereby ensuring the long-term sustainability and competitiveness of key sectors of the domestic economy.

Key Reform Results

During the four-year strategic cycle, NALED confirmed its role as a key Government partner in implementing systemic reforms through participation in more than 60 working groups. Our contribution was focused on the digitalization of public services, tax modernization, and the improvement of legal certainty in strategic sectors of the economy.

Taxation of Freelancers and Lump-Sum Entrepreneurs

NALED initiated the development of the legislative framework and supported the creation of the digital platform (frilenseri.purs.gov.rs), which enables quarterly income reporting with the option to choose between taxation models. In 2024, NALED also supported the automation of health insurance card validation through the integration of the Tax Administration and Health Insurance Fund systems, eliminating the need for in-person counter visits.

In the area of fiscal relief, predictability for lump-sum entrepreneurs was ensured through a cap limiting tax increases to 10%, along with significant incentives for start-ups and newly established businesses. NALED had previously initiated and supported the introduction of an online calculator and automatic assessment of lump-sum tax liabilities.

Countering shadow economy

NALED continued to support the Government of the Republic of Serbia in the systemic fight against Shadow Economy through coordination and expert contribution to the development of the national strategy and action plan for countering shadow economy. Its implementation reached 70% and contributed to reducing the share of Shadow Economy from 29.1% to 21.1% of GDP.

Parafiscal Reform and the ePlati System

Through the ePlati system, the payment of all fees and charges was digitalized, representing the culmination of NALED's decade-long advocacy efforts. This reform, included in Serbia's official Reform Agenda 2024, introduced full transparency in the area of non-tax charges. To support the implementation of the reform, NALED assisted in connecting more than 160 public authorities and over 3,000 administrative procedures, while more than 500 civil servants were trained through online and in-person sessions to review payments and record fees and charges.

Improved Public Procurement

With NALED's support, environmental and quality criteria were introduced into the Law, replacing the previous exclusive focus on the lowest price, alongside the development of five accompanying guidelines for their practical implementation and the organization of numerous training Programs. NALED also worked on improving the Public Procurement Portal and the bidder registry, contributing to a significant increase in the number of registered participants, as well as on the development of an eLearning platform for the continuous training of contracting authorities and bidders. These activities contributed to increasing the share of green procurement from just 1.97% in 2021 to 7.29% in 2025.

Establishment of the eSicLeave System

An initiative originating from the Grey Book resulted in the introduction of the “eSick Leave – Employer” system, whose full implementation began on 1 January 2026. The reform eliminates paper-based documentation and enables instant digital exchange of data between doctors, the Health Insurance Fund, and employers.

Establishment of eHealth Records and RIZIS

NALED coordinated the working group responsible for the adoption of the Law on Healthcare Documentation and accompanying by-laws during 2024/25. Through the establishment of the Republic Integrated Health Information System (RIZIS) and eHealth Records, a centralized database was created to support more efficient treatment and diagnostics.

Property Registration Reform – Svoj na svome (Home and Dry)

Through the preparation of the Blueprint for Property Rights Reform in Serbia and participation in drafting the Law on Special Conditions for Property Rights Registration, NALED contributed to improving conditions for the formalization of illegally constructed buildings. NALED also supported the implementation of the reform through the development of an informational brochure, promotional materials, and the “Svoj na svome (Home and Dry)” website, providing access to electronic applications and answers to frequently asked questions. In line with NALED’s recommendation, targeted convalidation was introduced, accelerating the alignment of cadastral records even in cases of incomplete documentation, consistent with recommendations from the Grey Book.

Abolition of the Conversion Fee

Amendments to the Law on Planning and Construction abolished the fee for converting land use rights into ownership rights, removing one of the most significant property-related barriers to economic development and implementing a long-standing NALED recommendation supported by an impact assessment analysis with improvement recommendations. Through the development of the “**Be Part of the Plan**” platform, transparency and citizen participation in spatial planning in Kragujevac were further enhanced.

Improved Procedures for 5G Infrastructure Development

NALED supported the establishment of the 5G network through years of advocacy aimed at simplifying procedures and reducing the costs of installing mobile telephony base stations, as well as through continuous dialogue with competent institutions and telecom operators.

Improved Regulatory Framework for Prosumers

Based on NALED’s analysis, amendments to the Law on Renewable Energy Sources and tax regulations increased capacity limits for energy prosumers (households up to 10.8 kW and businesses up to 150 kW), while significantly improving the tax treatment of self-generated electricity.

Introduction of the Carbon Border Adjustment Mechanism (CBAM)

Through analyses and recommendations, NALED contributed to the establishment of a national carbon pricing mechanism complementary to CBAM, as well as to the preparation of support measures helping businesses adapt to European sustainability and decarbonization requirements.

Improvement of eServices

Through technical support provided to the Ministry of Information and Telecommunications in drafting and adopting the relevant regulation, support was secured for the introduction of video identification in the issuance of eIDs, as well as mandatory eInbox accounts for businesses, making digital document delivery the standard. NALED also supported digitalization in other public administration procedures – including the automation of motor vehicle transfer tax payments, the introduction of electronic tax certificates on the Local Tax Administration portal, and enabling the use of digital documentation on construction sites.

Adoption of the Law on Social Entrepreneurship

As part of the Coalition for the Development of the Solidarity Economy, NALED participated in drafting the Law on Social Entrepreneurship (2022), through which Serbia established its first systemic framework for supporting enterprises pursuing social objectives, thereby formalizing a sector comprising several hundred organizations.

Support Programs and Development Initiatives

Through five cycles of the “StarTech” Program, 106 grants were awarded to startups in a total value of USD 3.7 million. Beneficiaries of this support are now operating in more than 27 global markets and have secured around 100 intellectual property rights. As the EIT Food Hub, and through the “Challenge Lab – Re:Generator” initiative and mentoring Programs, NALED supported dozens of innovators from universities across the country. A special focus on inclusiveness was confirmed through the “Small and Powerful” Program, under which five women entrepreneurs received grants of GBP 10,000 each. Through the “Better Way” Program, completed at the end of 2025, nearly 10,000 small businesses received subsidized conditions for introducing cashless payment systems. Installed POS terminals processed 12 million transactions worth EUR 146 million, resulting in approximately EUR 24.4 million in VAT revenue paid into the state budget.

In addition to the above reforms, NALED improved access to information and tax incentives through the **Viber chatbot for innovators**, as well as the **Small Business Information Portal**, which serves as a central platform for informing entrepreneurs, supported by continuous digital communication with users. NALED also developed a **B2B** platform for connecting large and small enterprises, which was transferred to the ownership of the Ministry of Science, Innovation and Technological Development.

During the implementation of the Strategic Plan, NALED played a significant role in driving the growth of Serbia’s digital community. The number of users of the **eGovernment** Portal increased

from 1.3 million in 2022 to more than 2.8 million at the beginning of 2026, representing a 112% increase. NALED contributed to this result through communication campaigns within the EDGE project, local information days, and the “eGovernment Caravan.” NALED also provided technical support for the implementation of the **Rural Broadband** project, through which nearly 1,500 km of network infrastructure was built, enabling high-quality internet access for more than 12,000 households in rural areas.

NALED also systematically strengthened capacities in the field of **public procurement** – 3,790 contracting authorities and bidders were trained, while a set of 21 guidelines for green, social, and innovative public procurement was developed, shifting the focus from the lowest price toward quality and sustainability. The number of registered bidders increased to 19,393 in 2025, representing a 33% increase compared to the beginning of the cycle.

Significant progress in **waste management** was achieved through the installation of 1,400 recycling bell containers across 14 cities, resulting in a 90% increase in glass collection. NALED also provided expert support for the development of regional waste management centres, thereby contributing to the long-term sustainability of the system.

Communications and Awareness-Raising Campaigns

The effectiveness of educational Programs and campaigns was directly supported by **NALED’s communication resources and logistical infrastructure**, which ensured visibility and direct engagement with citizens and businesses:

- A total of **810 events were organized, gathering 45,000 participants**. The structure of these activities confirms a primary focus on education, as workshops and training Programs accounted for more than half of the overall portfolio (over 400 events). In 2025 alone, **247 events were held**, with a strong emphasis on operational training sessions (129) and expert round tables (40), enabling the direct transfer of knowledge to target groups.
- With an average of more than **6,000 media mentions annually**, NALED maintained a continuous presence in the public sphere. Digital media represented the primary communication channel (84%), while strategic cooperation with national broadcasters and the launch of new formats, such as **podcasts** (with a total of 78,000 views across all formats), ensured outreach to diverse demographic groups. Thematic analysis indicates that the organization is positioned in the media as an expert source of information in the areas of economic development, reforms, and local self-government operations.
- NALED manages a network of **19 specialized web portals**, generating between 4.3 and 7.2 million visits annually. Platforms such as uzmiracun.rs, startech.org.rs, and frilenseri.purs.gov.rs serve as information hubs for specific user groups, while the main portal, naled.rs, remains the central platform for the distribution of policy documents and initiatives.
- A significant increase was recorded in **the follower base across 20 social media channels**, led by LinkedIn (73%) and Instagram (70%). Since 2025, communication

activities have been further diversified through the introduction of the TikTok platform, while the YouTube channel has served as an archive of educational and promotional video content, averaging more than 100,000 views annually (reaching up to 265,000 in 2022).

NALED implemented a series of innovative campaigns and educational Programs focused on digital literacy, security, and sustainability, directly empowering thousands of individuals and businesses. Below are several notable examples:

Uzmi račun i pobedi (Take a Receipt and Win)

Strengthening tax culture and encouraging cashless payments were significantly reinforced through the “**Uzmi račun i pobedi (Take a Receipt and Win)**” prize game, which has been fully digitalized since 2022 in line with NALED’s recommendations. Three annual cycles were organized with NALED’s support, including the management of the contact centre and the national portal uzmiracun.rs. During this period, more than one million citizens scanned over 700 million receipts, with every fifth receipt paid cashlessly.

Cybersecurity and Digital Resilience

In cooperation with the National CERT, several hundred representatives of the public and private sectors completed specialized training Programs on protection against cyberattacks and the preparation of information security policies. Through the distribution of Information Security Guidelines to more than 10,000 addresses and the preparation of a detailed analysis of local self-government systems, data protection standards across the country were significantly improved.

Promotion of Digital Entrepreneurship

In cooperation with RTS, the “GoStudy” series was broadcast within the morning Program format, bringing the world of innovation, intellectual property rights, and taxation models closer to young audiences. At the same time, a free educational platform featuring 12 modules and 180 lessons was launched, providing entrepreneurs with more than 15 hours of video materials for improving digital business operations.

Environmental Protection Campaigns

NALED led a series of impactful initiatives aimed at promoting recycling and responsible waste management. The “The Bell is Calling – Recycle Glass” campaign directly influenced changes in citizens’ habits, while initiatives such as #GetInvolved (battery and lightbulb recycling) and the organic waste collection challenge (otpadodhrane.rs) contributed to the circular transformation of local communities.

Promotion of eServices and the eGovernment Caravan

A key contribution to the increase in the number of eGovernment Portal users – from 1.3 million to more than 2.8 million – was achieved through field activities. Campaigns within the EDGE project, local information days, and the “eGovernment Caravan” enabled citizens across Serbia to learn first-hand about the benefits of digital services, while NALED’s support in improving the user experience on the portal made these services more accessible and intuitive.

Regional Cooperation and EU Integration

NALED significantly expanded its influence beyond Serbia’s borders, setting standards for a favourable business environment and actively participating in shaping the European agenda for the Western Balkans.

The former BFE platform evolved into the **CORE Partnership** (Partnership for Competitive Region), an institutional network that today connects seven regional economies (Serbia, Montenegro, North Macedonia, Bosnia and Herzegovina, Albania, Kosovo*, and Croatia). Through the organization of major regional conferences (**CORE Days**) in Dubrovnik, Kotor, and Belgrade, the exchange of best regulatory practices was further strengthened, while in 2023 the results of **the regional Sustainable Business Environment (SBE) Index** for Southeast Europe were published.

The fourth edition of the **BFC SEE standard** was developed, integrating ESG criteria and EU integration requirements for the first time. This Program directly improved business conditions in **more than 130 local self-governments** across the region, while Moldova also expressed interest in implementing the model, further confirming the international credibility of NALED’s methodology.

NALED actively manages key processes related to **alignment with EU standards**. Since 2024, it has chaired the Intersectoral Working Group of the National Convention on the EU (NCEU) for the **Economic Reform Program (ERP)**, and since 2025 it has coordinated the NCEU sub-group for **the business environment and private sector development** (Pillar I of the Reform Agenda). NALED regularly provides expert input for the European Commission’s annual Serbia Progress Reports, ensuring that the voice of the business community is represented in the accession process.

As recognition of its excellence in the field of innovation, NALED became an **EIT Food Hub** in 2023, and since 2025 has also served as the official **EIT Community Hub** for Serbia. This position enables the direct connection of domestic innovators in the fields of food, technology, and sustainability with funding opportunities and mentoring Programs of the European Institute of Innovation and Technology.

Key Success Factors and Working Approach

- **Strong Expert Team:** A team of 100 dedicated professionals combining a high level of expertise with creativity, resilience, and a strong sense of ownership over reform processes.
- **Data-Driven Decision-Making:** The use of in-depth analyses, surveys, and ex-ante research as an indisputable scientific basis that accelerates policymaking and ensures the credibility of recommendations.
- **Direct Operational Role and Accountability:** The greatest successes were achieved where NALED assumed full operational responsibility for implementation, transforming strategic objectives into tangible benefits for citizens and businesses.
- **Digitalization as a Shortcut to Reform:** A focus on software-based solutions (Freelancers, eSick Leave, ePlati) enabling systemic progress and efficiency gains without requiring lengthy institutional transformations.
- **Financial Resilience:** Diverse funding sources, a broad membership base spanning all three sectors of society, and the support of international and private donors ensure the organization's sustainability and resilience to external disruptions.
- **Extensive and Strong Partnership Network:** Long-term cooperation with businesses, local self-governments, civil society, state institutions, the diplomatic community, and the media contributes to NALED's credibility, objectivity, and independence.
- **Institutional Influence and Know-How:** A unique methodology embodied in the Grey Book and formal roles within Government working groups and European bodies (such as the EIT Community Hub), providing NALED with the legitimacy to shape the reform agenda (agenda setting).
- **Synergy Between Expertise and Political Will:** The ability to recognize moments of institutional openness and capitalize on them by providing ready-made, professionally grounded, and operationally supported solutions (Case Study: " Svoj na svome - Home and Dry).

Analysis of Obstacles in the Implementation of Program Objectives

Although the overall implementation rate of planned reforms reached 80%, certain objectives scheduled for completion by the end of 2025 were not realized. The following areas are particularly noteworthy:

- **eInspektor:** Key delays were recorded in the further improvement of the eInspector system and the development of new annual coordination roadmaps for sectoral inspections. Due to the redefinition of priorities within the U.S. administration, funding was withdrawn for the preparation of the Functional Employment Analysis and the Financial Analysis of Salary Coefficients. This additionally slowed the planned systemic resolution of staff shortages and

adequate remuneration in inspection services, although the primary reason for stagnation remains the lack of political will.

- **Future Mobility:** The adoption of the overarching Program for Future Mobility was postponed due to the complexity of coordination among several line ministries and shifting Government priorities. This directly affected the implementation of research on the infrastructure needs of local self-governments for electric and hybrid vehicle charging stations, which remains a critical issue for the development of sustainable transport.
- **Agriculture:** Within the eAgrar system, the establishment of the subsidy registry and the full upgrade of the electronic agricultural funding allocation system progressed more slowly than planned. In addition, the objective of digitalizing at least one more key procedure in the field of food and agriculture was postponed to the next period in order to ensure further alignment with technical standards.
- **Environment:** In this area, the implementation of a larger number of measures was hindered by frequent changes within the competent ministry and shifting Government priorities. Objectives related to the implementation of the Circular Economy Action Plan, the adoption of the Law on Packaging and Packaging Waste, and the introduction of incentives for special waste streams were not achieved. Progress was also lacking in the systemic resolution of wastewater management, including institutional coordination, strengthening the capacities of local self-governments, and establishing a tariff system.

Understanding the obstacles that led to the partial or non-implementation of certain objectives represents an important basis for planning the next strategic cycle, with the following key external and internal factors standing out:

- **Global Uncertainty:** Geopolitical tensions and conflicts contributed to economic and political instability, resulting in the redirection of funding and international aid priorities. The sharp increase in interest rates during 2022 and 2023 further raised financing costs and slowed investment flows, while changes in the global development agenda, announcements regarding the redefinition of U.S. foreign policy, and the shutdown of USAID introduced uncertainty regarding future donor Programs.
- **Institutional Dependence and Political Cycles:** The pace of reforms remains closely tied to the work of the Government and legislative processes. Frequent election cycles resulted in prolonged “technical mandate” periods and a slowdown in the regulatory process, accompanied by a loss of focus on strategic and long-term reforms.
- **Social Context and Trust:** Political and social tensions in the country during the observed period led to increased polarization, a shift in focus away from economic reforms toward other priorities, weakened trust, and a lack of public-private dialogue.
- **Complexity of Coordination and Resistance to Change:** Reforms requiring synchronization among multiple sectors often encountered administrative delays. Insufficient interinstitutional cooperation and the limited willingness of certain parts of the

administration to prioritize innovative topics resulted in the postponement of already prepared initiatives.

- **Structural Complexity and Resources:** The transformation of large systems, such as the Tax Administration or the Cadastre, requires long-term IT and regulatory changes that exceed the scope of a single strategic cycle. At the same time, the lack of stable project and budget financing for certain areas slowed the implementation of solutions requiring significant initial investments.
- **Adaptation to Ad Hoc External Priorities:** The organization's involvement in externally and ad hoc imposed topics, which were not originally positioned as strategic priorities within NALED's plans, led to a dispersion of focus and weaker implementation of these activities.