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# USAID EMPOWER PRIVATE SECTOR

## Activity

### FIRST KOSOVO GREEN FESTIVAL

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*Students visiting the booth of a plastics recycler at the Festival's "Green Pavilion"*

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## 1. Green Festival Overview

### Festival Purpose

The primary purposes of the first Kosovo Green Festival were (i) to promote the growth of Kosovo green business markets, in order to expand sales and jobs for their local suppliers, (ii) to advocate for policy, legal, and regulatory improvements needed for green business growth, and (iii) to expand public awareness of the benefits of adopting green practices and technologies, and of how citizens can support environmental sustainability.

The “green” sector, covers a wide range of businesses in renewable energy, energy efficiency, and recycling. It offers substantial opportunities for economic growth and job creation, mostly in business that is entirely domestic. Examples currently active in Kosovo are production of biomass fuel pellets, collection of waste plastic for reprocessing into greenhouse covers, reprocessing of used motor oil, production of solar photovoltaic panels, and manufacturing of energy-efficient doors and windows, in which even the remainder flat glass is locally recycled by a third party into decorative wall tiles.

For the green industry to realize its full potential, government policy improvements are needed to stimulate renewable energy generation, energy conservation, and recycling.

The First Kosovo Green Festival was an initiative of the USAID EMPOWER project, to promote sales and employment in the green business sector, to help improve Kosovo’s ecology and beauty, and, more broadly, to help Kosovo contribute to the amelioration of global climate change. The Festival was intended to be the first installment of what will become a sustainable annual event in Kosovo, and could even grow into a larger regional show.

### Festival Program

The Green Festival took place alongside the EXPOKOS Fair 2016 in Pristina, a multi-sector trade show operating for the past 15 years. The 3-day event, which was held over May 25-27, centered around operating business clusters in the renewables, energy efficiency, and recycling sectors. The Green Festival was a collaboration of private businesses, government agencies, donors, schools, and NGOs. The principal sponsors were USAID, German Development Cooperation, and ProCredit Bank.

The principal activities of the Green Festival were:

- The “*Green Pavilion*”, where 16 companies displayed their renewable energy, recycling, and energy efficiency products to the public.
- A “*Green Forum*”, which consisted of daily seminars focused on each of the three green business subsectors. The results of the forums are presented in the following sections of this report. For each Forum seminar, there were presentations by the cluster businesses, followed by a panel discussion among stakeholders (government, utilities, NGOs, and private companies) on the policy, legal, and regulatory issues that need to be addressed in order to grow green business and improve economy-wide energy-saving practices.
- “*Parallel activities*” to encourage public awareness and engagement in environmental sustainability and the “circular economy”, which took in public outside the main Festival venue.

The VIP grand opening of the Green Festival was held at the EXPOKOS/Green Pavilion on the morning of May 25, with remarks from Greg Delawie, US Ambassador to Kosovo, stressing the importance of the green economy on job creation in Kosovo and the opportunities therein. Remarks were also made by Ivo Šilhavý, Czech Republic Ambassador to Kosovo on business links between the two countries and the sharing of technology and resources. Ferid Agani, the Kosovo Minister of Environment and Spatial Planning, focused on the importance of green business in the Kosovo’s

environmental sustainability. Blerand Stavileci, Minister of Economic Development, spoke of the GoK's commitment to renewable energy. Ilir Aliu, CEO of ProCredit Bank, which was a co-sponsor of the Festival, described the bank's efforts in establishing and expanding a loan portfolio dedicated to the financing of energy efficiency investments by businesses and consumers.

## 2. Solar Energy Forum

The forum on solar energy took place on Day 1 of the Festival, 25 May 2016, focusing on the design and installation of solar systems in Kosovo. An overview was provided by Dr. Alicia English, Executive Director at Crimson Opportunity Development, Energy Natural Resources and Agricultural Research (ENRA).

### 2.1 Opportunities and Challenges of the Sector

- Low energy prices that impact the payback period for solar investments
- The need for uniform training and certification of installers
- Registration / tracking of existing and forthcoming solar installations, including off-grid
- Lack of regulation as to installations and connections
- Preparation of the grid for distributed generation (KEDS investment plan)
- Financing of solar energy-related installations, including combined equity/grants/loans packages
- Identification of suitable pilot areas for energy storage / sharing systems to minimize grid load balancing challenges
- The need for energy efficiency investments to go along with solar energy investments, given the higher costs per kwh of solar.

### 2.2 Opportunities and Challenges of Businesses

The panel of business representatives included:

- **Gazmend Haxholli**, CEO, Jaha Energy – Solar panels manufacturer
- **Visar Kelmendi**, CEO, Green Energy Technologies – Solar energy equipment installer
- **Lulzim Sylja**, Managing Director, ELEN – Electrical and solar energy equipment installer

*Concerns noted:*

- The VAT on imported panels and components. In Kosovo, PV modules are taxed at 19% VAT, while elsewhere in the region and in the EU they have a 0% VAT rate. This discourages business and household investment in solar systems in Kosovo.
- The need for strengthened GoK professional capacities in energy policy, regulation, economic impact, etc.
- Lack of qualified individuals in the market, due to a lack of programs in vocational schools and universities for concentration in the areas of renewables and energy in general, as well as a lack of adequate literature and materials on these subjects.
- Lack of trainings on advanced electric system installation, building management systems (BMS) planning, renewable energy topics, etc.
- Lack of the government development strategy and support to aid energy innovation.

- Lack of construction standards and compliance with building codes and electro-energy / renewable energy / efficiency standards, leading unfair competition and misuse of the tendering process, hampering proper development of the sector.
- Enforcement of law, courts, and procurement.

### 2.3 Policy, Law, Regulation, Support, and Incentives for Solar Energy

The solar energy business environment panel included:

- **George Karagutoff**, CEO, Kosovo Electricity Distribution Service (KEDS)
- **Ardian Berisha**, Deputy Chief of Party, USAID RePower Kosovo
- **Besiana Qorraj**, Head of RES, Kosovo Ministry of Economic Development
- **Dr. Alicia English**, Executive Director, Crimson Opportunity Development / ENRA (Moderator)

*Concerns noted:*

- *Safety & Security:* Protection of the system is of utmost priority. No one currently knows where solar panels are installed and the grid can be 'live' when workers are interacting with it to do repairs. There is a lack of redundancy in the system to be able to isolate and close areas and reroute energy.
- *Planning and Forecasting:* The cheapest electricity is bought in advance, but in the case of solar, not knowing when the sun will shine makes the estimation of electricity needed in the system challenging. These deviations can be expensive to meet or require load shedding.
  - Balancing costs: Disruptions in solar production will occur during peak hours of use. Without proper planning this can add significantly to the costs of procuring energy.
  - Small scale monitoring: System updates are needed to be able to monitor production at small levels. This requires investment in GSM/DSM systems.
- *Managing costs for the end user:* There are already issues with affordability. Remote / distributed generation (DG) adds complexity and costs to a system that is currently not able to fully cope. KESCO controls dispatch capabilities – it has exclusive right to purchase and sell.
  - KEDS will push for medium voltage DG (10 kV), which is likely to be the most cost effective of all the potential options and can be contracted more easily.
  - Anything smaller should be planned as an island, or not be connected to the electricity system (e.g. solar water heating) to minimize safety issues until the system is prepared (via the KEDS investment plan regarding renewables).
- *Lack of Regulation:* KEDS is preparing a grid code study for the Kosovo Ministry of Economic Development (MED) and KOSTT. Building codes for solar are also lacking.

*Discussion / comments / observations of panel participants and attendees:*

- Solar businesses argued that the country cannot have development with only one electricity distributor.
- There is a need for coordination and cooperation in order to enable green energy in Kosovo. A "green fund" is proposed to support solar.
- Solar panel installation at a meat production and packaging factory in Ferizaj by GET has reduced its energy costs by 90%.

- Businesses claimed that they may currently be more favorable for solar panel installations than households, because they have greater potential to save on energy consumption, and greater ability to co-finance installation costs. They said that absent government support, banks are currently the best stimulators for energy efficiency and renewables.
- For apartments, one way of handling solar energy would be to power common utilities, such as elevators.
- The payback period for solar panels is 5 years, whereas their lifetime is 25 years. However, with battery storage, the payback period could be up to 11 years. The payback period for solar thermal investments in households is 3 years.
- Kosovo is lacking in relevant education – none of the 60 vocational schools offers professional training in solar energy.
- There is a high potential of solar energy in Kosovo, where average days with sun per year are 278, at 4.4 kw/h per m2 – both significantly higher than in Western Europe, where investment in solar is substantial.
- Google's has a new online tool, Project Sunroof, which uses the same technology that powers Google Earth, allowing businesses and homeowners to explore their own rooftops to determine if they are suitable for solar panels.
- Since there is currently no way of storing electricity in Kosovo, contracts on import and export need to be signed based on the relationship between generation and demand. If demand is higher than generation, there are two ways of making up for it: load shedding or secondary and tertiary reserves activation.
- MED plans that 25% of the energy produced in Kosovo is going to come from renewables by 2020. Only 10 MW of grid-connected solar energy is currently approved – a tiny fraction of the current ~1500 MW of installed grid generating capacity, 95% of which is coal-based. However, home-based / off-grid renewable energy – including biomass fuel pellets as well as solar installations – currently is not tracked against the target, and is substantial.
- A one-stop-shop is being established by MED, to inform and coordinate with potential investors in solar and other renewables.
- According to MED analysis, only 3% of the energy for heating utilized in Kosovo comes from electricity; 19% comes from wood.
- MED does not think that solar businesses need to be incentivized; believing that market incentives are adequate.
- EU laws and regulations are being transposed into national law, creating a better operating environment for energy and energy efficiency businesses – for example, the Energy Treaty (20:20:20).
- The Energy Regulatory Office (ERO) has already started receiving applications for wind turbine installations in Kosovo. ERO releases two kinds of authorizations: preliminary and final. No wind turbine business has yet received a final authorization from ERO to sell renewable energy into the grid.
- ERO has approved feed-in tariffs for renewable energy generation for 10-12 years.
- All parties agree on the necessity of increasing the portion of energy that comes from renewables as well as the potential benefits coming from solar energy.

### 3. Recycling Forum

On the second day of the Green Forum, 26 May, discussions regarding the business of recycling were held. The forum was opened by David King, Chief of Party at USAID EMPOWER Private Sector.

#### 3.1 Opportunities and Challenges of the Sector

- Kosovo EPA (2014) estimates that about 300,000 tons of *municipal* waste are generated annually in Kosovo, of which over one-third consists of recyclable glass, plastic, and paper. Of the recyclables, most of the paper, about half of the plastic, and little of the glass (only flat glass) is being recycled.
- Meanwhile, KEPA estimates *total* waste generated in Kosovo at 1.7MM tons – far more than just municipal, which presumably can be measured because it goes into properly-managed landfills. The rest goes into hundreds of illegal/unmanaged dumps across the country. These are a blight on the environment, and, economically, a wasted resource for recycling.
- Value chains – i.e. lines of business – in recycling include:
  - Plastic (foils for greenhouses, construction insulation, polyester fabric, jacket insulation, plastic bottles, plastic lumber, buckets, chairs, toys, etc.)
  - Glass (bottles and jars, fiberglass for boats and building materials, tiles)
  - Metals (all kinds of things – rebar to car parts)
  - Paper (newsprint, paperboard, corrugated cardboard, paper towels etc.)
  - Collecting and sorting itself is a business – indeed, maybe most of the new jobs overall are here, though there may be more labor in some of the recycle-manufacturing operations than in original large-mill manufacturing.
  - Other materials, such as engine oil, are truly recycled to their precise previous use (rather than “re-used”)
  - A 2015 study for the state of Ohio estimated that its recycling sector employed 14,000 people – more than the entire mining and logging industries in the state.
- Improvements in policy / law are needed, including banning the disposal of some wastes – engine oil, batteries, tires.



At a Green Festival parallel activity, onsite production of new handbags from recycled fabric items brought in by the public.

#### 3.2 Opportunities and Challenges of Businesses

The panel of business representatives included:

- **Riad Smakolli**, Deputy CEO, Orient Mosaic Kosova – Glass Recycler
- **Alban Rama**, General Director, Izolimi Plast – Plastic Recycler
- **Burhan Baftiu**, Representative, BTP Holding – Motor Oil Recycler
- **Zijadin Dashi**, Owner, Stagova – Tire Recycling

*Concerns noted:*

- Waste-producing businesses are giving out their waste to entities which burn or resell it, rather than using it in production.

- There is a shortage of trained environmental inspectors at the local level.
- Random power outages disrupt recycling operations.
- Connections between recycling businesses and waste-producing businesses and individuals are weak.
- System “manipulations” lead to price discrepancies of imported recyclable materials.

### 3.3 Policy, Law, Regulation, Support, and Incentives for the Recycling Sector

The business environment panel for recycling included:

The panel of key stakeholders included:

- **Kai Hofmann**, Program Manager, GIZ Sustainable Municipal Services
- **Ferid Agani**, Minister, Ministry of Environment and Spatial Planning
- **Arian Zeka**, Executive Director, American Chamber of Commerce in Kosovo (Moderator)

*Discussion / comments / observations of panel participants and attendees:*

- Sustainable development goals have replaced millennium development goals.
- There is a lack of infrastructure for public waste separation for recycling.
- There are numerous illegal landfills throughout the country.
- More channels are needed to properly connect recycling businesses with waste-producing businesses and individuals.
- Municipalities need to take more leadership in facilitating and promoting recycling at the local level.
- Recycling is one of the most profitable sectors in the energy industry.
- Draft law states that “strategic” investments in the collection, disposal, recycling and waste management sector – those that would qualify for government incentives – should be for a minimum of €20MM and create at least 30 jobs. This amount is too high for most domestic businesses to benefit from.
- A GIZ project focusing on identifying illegal landfills and putting them on a digital map will be launched.
- It takes 95% less energy to produce aluminum from recycled cans than from raw materials.
- Unlike other economic sectors, recycling does not depend on natural resources (other than energy), and the energy business does not depend on exports. It is an economic sector that can be built almost entirely on local demand and supply.
- To establish a recycling economy, public awareness of the economics is needed, as well as infrastructure to separate waste at source, and waste collection fees and incentives.

## 4. Energy Efficiency Forum

This forum, which took place on Day 3 of the Festival, 27 May, consisted of a panel only. It was introduced by EMPOWER COP David King. The panel consisted of:

- **Gezim Tropoja**, Director Energy Department, ProCredit Bank
- **Bedri Dragusha**, CEO, Kosovo Energy Efficiency Agency
- **Argjira Krasniqi**, Architect, ECOWEEK Associate



- **Erion Sico**, Territorial and Architectural Marketing Manager, Guardian Glass
- **Avni Sfishta**, Country Coordinator, GIZ (Moderator)

#### 4.1 Opportunities and Challenges of the Sector

- Jobs in building renovations for efficiency, and new efficient buildings, are estimated to be far larger than in renewable energy or recycling. And many years of work are ahead in this.
- Currently low energy prices impact the payback period for investments.
- Much greater dedicated access to finance for energy efficiency investments is needed.
- There is a strong connection between energy efficiency and renewable energy investments. They must be coupled if more expensive/kwh renewables, or installations, are to be overall affordable.
- A recent 21-country study showed that the correlation between economic growth and carbon emissions that has been a hallmark of development since the industrial revolution has finally been broken – since 2000, GDP has grown but carbon pollution is down. A major reason for this “decoupling” was the adoption of energy efficient technologies, and, more recently, renewable fuels.
- Based on EMPOWER’s survey of Kosovo businesses for energy use and issues (March 2016), 85% of them plan some kind of investment in energy-saving technologies over the coming year. While a few of these are simply changing to energy efficient lighting, most are considerably more ambitious – roof and wall insulation, solar installations, etc.

#### 4.2 Policy, Law, Regulation, Support, and Incentives for Energy Efficiency

*Discussion / comments / observations of panel participants and attendees:*

- Lack of governmental funding to support efficiency, given up front affordability
- Need for efficiency-related training as part of curricula in vocational schools and universities
- Lack of building codes in Kosovo supporting energy efficiency, which presents a growth challenge for architects, urban planners, and energy efficient door and window producers.
- Lack of awareness of the economics of investment in energy efficiency, such as for insulation and door/window replacement.
- ProCredit Bank offers eco-loans for both private and business clients. Its eco-loan portfolio is now €30MM. It organizes meetings and workshops with clients informing them as to the advantages of energy efficiency measures.
  - Households: Loans have been used for internal and external insulation of homes (insulation 8 cm thick, space of 16 mm in between two panes of energy efficient windows), installation of efficient doors and windows, central/geothermal heating systems, energy efficient household appliances (dishwashers, fridges, ovens, water heaters, etc.).
  - Businesses: Production process improvements, replacement of old machinery with energy-saving equipment, building renovation.
- The Kosovo Energy Efficiency Agency (KEEA) has so far invested €18MM in energy efficiency renovation for public buildings,, including schools and hospitals. It continues to invest €200K annually to raise awareness. It has distributed materials depicting the benefits of energy efficiency, and encouraged energy efficiency-related education in kindergartens and primary schools.

- KEEA is understaffed, given that it must monitor 38 Kosovo municipalities.
- With the EU directive 2012/27 having not been fully implemented in Kosovo, the lack of energy efficiency labels on products makes it difficult for customers to know the energy performance of their purchases.
- The current Law on Public Finance is said to be an obstacle to creating the anticipated Energy Efficiency Fund and Environmental Protection Fund, which are conditions for EU alignment.
- A principal GoK objective is to increase public capacities for management of waste.

## 5. Biomass Energy Forum

The biomass energy forum also took place on Day 3, 27 May. Opening remarks were by Liza Marku, Job Creation Team Leader, USAID EMPOWER Private Sector Kosovo.

### 5.1 Opportunities and Challenges of the Sector

- Consumption of biomass wood heating fuel pellets is estimated by EMPOWER at possibly 50,000 tons/year, of which less than half is locally produced. Consumption is growing rapidly, faster than local production; 29,000 tons of fuel pellets were imported in 2015, probably double the amount of the previous year. There is substantial opportunity for import substitution, with consequent sales growth and job creation.
- Local production capacities are relatively small. Until 2015 there was no local producer with yearly production higher than 2,500 tons. Most operators produce 200-800 tons per year.
- The main problem with the raw material supply chain is forest mismanagement or non-management. Much wood biomass taken out of the forest is diverted to inefficient burning of cordwood by households. The supply of sawdust from sawmills is quite limited relative to final product demand. The main source of wood for pellets must come from forest cleaning under proper forest management.
- Local producers need to optimize their production, increase efficiency, and obtain certification for product quality (EN and EN-Plus standards) in order to become more competitive, gain customer trust, and gain better pricing. Currently, locally-produced pellets must be priced lower than imported ones in order to sell, due to quality perceptions.
- There is potential to develop alternative sources of raw material for fuel pellet production, including chicken manure, straw, and coal/lignite. There is already a company supported by EMPOWER that will produce pellets from a mixture of wood chips and chicken manure.

### 5.2 Policy, Law, Regulation, Support, and Incentives for Biomass Energy

Participants on the combined business and policy panel included:

- **Taulant Rexhepi**, Director, ENRAD – Pellet stove manufacturer
- **Bashkim Zejnullahu**, CEO, Thes ari – Biomass pellets producer
- **Tahir Ahmeti**, Director, Kosovo Forestry Agency
- **Ardita Dinaj**, Adviser, Connecting Natural Values & People (CNVP)
- **Aleksandar Nikolovski**, UNFAO Contact in Kosovo, UNFAO (Moderator)

*Discussion / comments / observations of panel participants and attendees:*

- Regulations and incentives for the use of biomass energy are lacking.

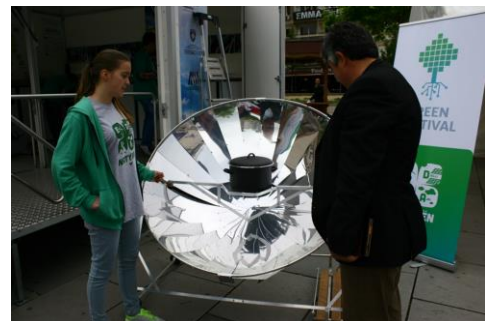
- The supply of sawdust as a primary input is limited, therefore for the industry to grow, proper forest management for the removal of usable material is essential.
  - Some plantations of fast-growing Paulownia, Salix Alba, and poplar for wood pellets are being considered.
- There is need for improved production operation and certified product quality. Currently no local producer's pellet product is certified.
- CNVP has undertaken a project to promote the use of wood waste for renewable energy, such as thin wood branches for space heating in schools, which would create employment while promoting forest conservation and rational use of wood.
- Grants from the European Union, USAID, and SDC are helping pellet producers expand production capacities and advance technologically, in the process creating new jobs.
- Challenges noted by pellet producers included a lack of skilled employees, frequent power outages that disrupt production, and lack of fiscal incentives for renewable energy sources.

## 6. Parallel Activities

In addition to the Green Pavilion and Green Forum, the Festival included parallel activities aimed at promoting public awareness of environmental sustainability and recycling. Most of these activities took place in outdoor stands set up for two days on Zahir Pajaziti Square, at the end of the Mother Teresa promenade. These were implemented by two NGOs – GAC and Ekofriend – and a private company, I'm Lu. Eight staff and 50 volunteers participated.

The parallel activities included:

- An information center to promote waste separation at source by the public
- Art-based workshops for "re-use and re-duce"
- A questionnaire and game on recycled waste management and environmental protection, with Green Festival t-shirts and reusable bags as prizes
- Photography exhibition by the Kosovo Green Club
- Demonstration of solar energy kits to power appliances and equipment
- Onsite production of stylish bags made of fabric from used products brought in by the public (old t-shirts, dresses, pieces of carpet)
- Visits by schoolchildren to the Green Pavilion to see demonstrations of how waste is recycled into final products
- Participation of students from the Architecture and Technical Faculty in the Green Forums.



GAC/EcoFriend volunteers demonstrating renewable energy resources.

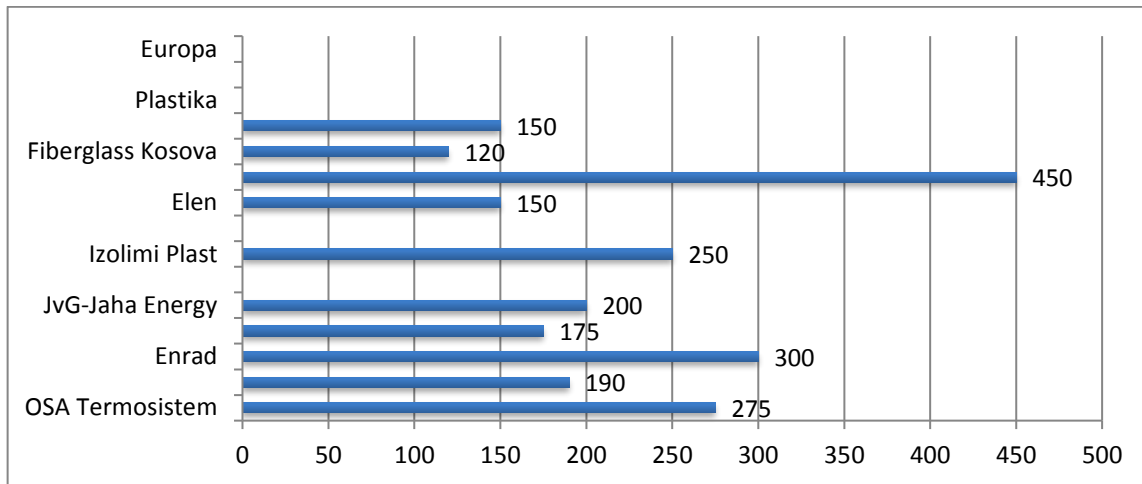
## 7. Business Impact

A key purpose of the Green Festival was to stimulate sales and employment in Kosovo green sector businesses, 16 of whom exhibited at the Green Pavilion. The companies were surveyed at the end of the festival as to the business they gained through their participation.

**Booth Visitors**

The companies were asked about the approximate number of visitors during the 3 days of the festival. Visitors were defined as those who stopped at a booth and showed interest in certain products or services. Not all exhibitors tracked visitors, but those that did are shown in Figure 1.

**Figure 1: Visitors to Company Stands**

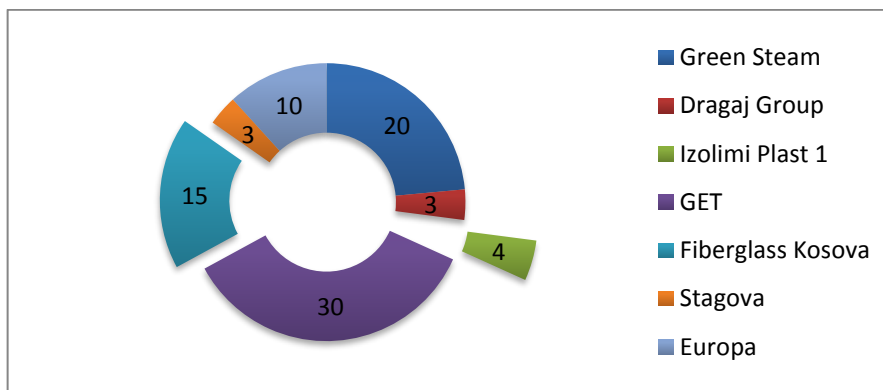


These statistics suggest an average of 225 visitors per booth over the 3 days.

**Sales Transactions**

While the number of booth visits is interesting and creates potential business contacts, the main goal is actual sales. The companies were asked about the number of sales transactions achieved during the Festival or to be concluded immediately thereafter. Figure 2 presents these results.

**Figure 2: Number of Transactions Achieved**



GET Group, a solar systems installer, achieved 30 sales transactions, followed by Green Steam, which had 20. The two bars located outside of the circle, Fiberglass Kosova and Izolimi Plast, show pending deals that need to be negotiated further.

**Festival Organization**

In order to improve Festival outcomes in the future, the companies were asked to comment on its organization. Most of the participants were satisfied. Some wished to change the location. Others sought more visitors.

All 16 participants responded “yes” to the questions of (i) whether they would attend again, and (ii) whether the Green Festival should become an annual event.

An issue that was discussed throughout the Festival was whether or not it should be organized alongside the EXPOKOS fair again. 10 voted for having with EXPOKOS again, believing that this would attract more visitors, while 6 companies stated that there is enough interest in energy efficiency, renewable energy or recycling to justify a stand-alone fair.

#### Festival Forums

The participants were satisfied and the forums were visited frequently. From 200 invitations that were sent, 133 found their way to the forums – 67% of the invitees.

#### Media coverage and promotion

Over 11,000 people viewed information on the Green Festival posted on EMPOWER's Facebook page. Four national TV programs (KTV, RTK, Klan, and TV21) – three morning and one evening – as well as one radio program, featured interviews with EMPOWER staff and private sector partners promoting recycling and renewable energy. After the fair the well-known "Ekonomia me Erzen" TV show highlighted the Green Festival and related EMPOWER activities in the energy sector, that included mini-documentaries on four Green Pavilion exhibitors. Finally, distribution of t-shirts and buttons widened public awareness of the Green Festival while it was running.

#### Conclusion

The Green Festival, as a first installment, was quite successful from a business point of view. EMPOWER will partner with key stakeholders to repeat the event in 2017, with the possibility of broadening it to include participation by companies and other stakeholders from the Western Balkans region, since there is presently no trade show devoted to green business taking place in Southeast Europe.