



Regional Stakeholder Report Serbia



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Chapter 1: Abstract

At the beginning of the 21st century, the Republic of Serbia is in an advanced phase of demographic transition, characterized by deep biological depopulation, developed all forms of modern internal and international migration, demographic aging, family and household transition. The main reasons for the decline in population is a natural decrease, and to a lesser extent emigration of the population abroad. The urban population predominates, 63.8%, in 2019, demographically younger than the population of other settlements. Due to the neglect of the development of rural-urban connections, inequalities in quality of life and accessibility, the disparities between urban and rural settlements are growing, reflecting in the long-term tendency to empty the rural area and the unplanned expansion of urban settlements.

There is no policy framework nor integrated approach to circular bioeconomy. Since it is a multidisciplinary subject, several strategies cover various aspects of it. The umbrella document that articulates the development goals and priorities of the rural development is the Agriculture and Rural Development Strategy for the period 2014-2024. The regional governments have the right to provide financial support for the implementation of rural development policies in their territories. The 3S for the period 2020 to 2027, adopted in February 2020, included the bioeconomy under the first priority ("Food for the Future"), and the circular bioeconomy by the concept of sustainable agriculture and food production. Many of the strategic documents that are related to bioeconomy are now in drafting stage. With their adoptance, it is to be expected that policy actions towards bioeconomy will gain in importance.

Economic activity in Serbia in 2020, measured by GDP, recorded minus 1.1 percent compared to 2019: modest decline because the predominant agro and food industry are doing well all the time. Covid19 didn't have particular effects on rural areas, due to the fact that rural areas provide a greater opportunity to employ less educated people, especially in agriculture. Urban centers and small towns play an important role in linking rural food producers to urban consumers. Besides flows of people, goods and money, there are linkages such in the flow of information and wastes, cultural and educational exchange.

Chapter 2: Definitions

Chapter 2.1: Circular Bioeconomy

There is no policy framework nor integrated approach to circular bioeconomy in Serbia. In projects, research papers and policy papers that were published, bioeconomy is defined as a production of renewable biological resources, biomass and their conversion into food, feed, bio-based products and bioenergy. Since it is a multidisciplinary subject, several strategies cover various aspects of it (e.g. Agriculture, Smart specialization, Wood industry Strategy etc.).

Generally accepted definition of a circular economy is missing, but the trend is growing. The most common definition of circular economy is that it is an economy in which the value of products, materials and resources is maintained in the economy for as long as possible, and waste generation is minimized. No specific strategic document in Serbia is dedicated to the circular economy. Circular economy is the part of various strategies, already adopted (e.g. Industrial Policy Strategy of the Republic of Serbia from 2021 to 2030, with the main pillar “Industry transformation from linear to circular model”), or are planned to be adopted/renewed this year (e.g. Waste Management Strategy, Environmental Protection Program).

There are some examples of good environmental practice and innovative approaches in Serbia that could serve as local-level examples. The Provincial Secretariat for Energy, Construction and Transport has, for many years, allocated grants for co-funding the implementation of projects concerning the use of biomass in the production of heating energy in public institutions in the territory of the Autonomous Province of Vojvodina. The aim is to use local resources such as crop residues, as well as waste from the wood processing industry and forestry. Straw bales may be used directly as potential fuel, as well as pellets from crop residues or wood waste¹.

Chapter 2.2: Contemporary processes

(a) Demographic change

At the beginning of the 21st century, the Republic of Serbia is in an advanced phase of demographic transition, characterized by deep biological depopulation, developed all forms of modern internal and international migration, demographic aging, family and household transition.

The period 1961 till 1992 was characterized by positive natural increase. Since 1992, a steady negative trend of natural increase has been recorded, 14,462 fewer inhabitants annually in the period 1991-2002, and 30,642 in the period 2002–2011.

Census	Population
2002	7,498,001
2011	7,186,862
2019 (approx.)	6,945,235

The main reasons for the decline in population in the inter-census period 2002-2011 and onwards is a natural decrease, and to a lesser extent emigration of the population abroad. In previous decades, the emigrants were unskilled workers who could not find employment in the domestic labor market. In the last 3 decades, the qualified, mostly highly educated

population emigrates from the Republic of Serbia with negative consequences on the labor supply and overall economic development.

¹ <http://www.psemr.vojvodina.gov.rs/index.php/dokumenti/saobracaj/item/558-javni-konkurs-za-dodelu-bespovratnih-podsticajnih-sredstava-za-sufinansiranje-realizacije-projekata-primene-toplotnih-pumpi-za-zagrevanje-hladenje-objekata-javne-namene>

² Šantić, D. i dr. (2019) Univerzitet u Beogradu – Geografski fakultet.

As a consequence of natural decrease, increased life expectancy (75.7 years in 2019) and young people emigration, the average age in the Republic of Serbia is 43.3 years³, which ranks the country among those with the oldest population in the world. The share of persons aged 65 and over increased from 16.6% to 20.7%. and working age decreased from 67.3% in 2002 to 65.0% in 2019.

From a typically rural area, with over four-fifths of the rural population, Serbia became a country with a majority urban population in less than half a century. The process was initiated mainly through intensive industrialization in the period from 1950s to 1970s. Depopulation of rural areas continues. During 2019 only, a number of 127,421 people permanently moved to an urban settlement. In 2019, the urban population predominates (63.8%), yet Serbia still belongs to the group of least urbanized countries in Europe.⁴

The result of the survey of attitudes and intentions of the population on resettlement in four local self-government units, done in 2019, shows that as many as 42.3% of respondents have intentions on resettlement. Most of the respondents, almost 50% would emigrate abroad, while only about 17% of people would go to Belgrade or some other regional center. The main reason for eviction is the bad economic situation (17.4%), better paid job (17%) and inability to find a job (9.1%)⁵.

The regional disparity in the level of GDP per capita is pronounced: the Belgrade region reaches 170.8%, the Region of Vojvodina 99.4, the Region of Šumadija and Western Serbia 65.8% and the Region of Southern and Eastern Serbia 63.8% of the national average⁶. Most of the economic activities (over 90%) take place in about 9% of the urban area of the Republic of Serbia⁷. Also, the urban population is demographically younger⁸ than the population of other settlements. Rural settlements in AP Vojvodina have better educational, as well as age structure of the population than rural areas in other regions, but still not favorable. All regions record negative rate of natural increase, except Belgrade and Vojvodina region, exclusively as a consequence of the positive migration balance to the cities of Belgrade and Novi Sad.

There was no significant change in ethnic composition in Serbia in the last decades. Serbs are the majority (83.3%), followed by Hungarians (3.5%), Roma (2.1%), and Bosniaks (2.0%), while other nationalities participate with less than 1%. All nationalities have an unfavorable trend in population development, except Roma and Bosniaks-Muslims⁹.

³ <https://www.stat.gov.rs/sr-Latn/oblasti/stanovnistvo/procene-stanovnistva>

⁴ <https://www.researchgate.net/publication/277246725>

⁵ Šantić, D. i dr. (2019) Univerzitet u Beogradu – Geografski fakultet.

⁶ <https://www.stat.gov.rs/oblasti/potrosnja-prihodi-i-uslovi-zivota/>

⁷ <https://www.mgsi.gov.rs/cir/dokumenti/urbani-razvoj>

⁸ <https://publikacije.stat.gov.rs/G2021/pdf/G20218001.pdf>

⁹ <http://www.nspm.rs/kuda-ide-srbija/etnicki-procesi-i-nacionalne-manjine-u-srbiji-po-popisu-2011.-godine.html?alphabet=>

b) Rural development

The umbrella document that articulates the development goals and priorities of the rural development is the Agriculture and Rural Development Strategy for the period 2014-2024. LEADER concept of the bottom-up approach is accepted. The National Rural Development Program (NPRD) by 2020, is designed in accordance with the IPARD structure in order to achieve the complementarity of support measures and avoid overlapping priorities and funding¹⁰. The Autonomous province and local governments have the right to provide financial support for the implementation of rural development policies in their territories, including direct payments. The AP Vojvodina, Secretariat for Agriculture defines the eligible activities and criteria for the incentives, as well as the criteria for the local development strategies approval.

According to the educational structure of persons older than 15 in rural areas¹¹, the most represented are those with completed high school, at the expense of reducing the participation of persons with lower education. This could be the prime driver of rural development, however, there is a noticeable decrease in the share of the most educated in the rural population in all regions. Modest knowledge and lack of additional skills are confirmed by data according to which 97% of the rural population did not attend additional training programs¹².

Over 4,000 kilometers of state and local roads have been renovated, most of them paved for the first time in small settlements. In the same period, over 362 km of highways were built. At the moment, another 262.5 km of highways are being built in Serbia.

The digital divide between rural and urban areas is very pronounced although 80.8% of households in 2019 have a broadband internet connection. The Ministry in charge of Telecommunications in June 2020 have started a project to install equipment in rural areas for broadband internet, funded by EBRD loans. It is expected to be completed by spring 2021.

c) Rural-urban cooperation

Urban centers and especially small towns play an important role in linking rural food producers to urban consumers. Besides flows of people, goods and money, there are linkages such in information and wastes flow, cultural and educational exchange. Rural-urban interactions also include “rural” activities taking place in urban centers (such as urban agriculture) and activities often classified as 'urban' (such as manufacturing and services) taking place in rural settlements.

¹⁰ The European Commission officially adopted the IPARD II program in Serbia for the period 2014-2020 in January 2015.

¹¹ Census 2012, <https://www.stat.gov.rs/sr-latn/oblasti/popis/popis-2011/>

¹² Ibid

There are more and more examples of urban population taking entrepreneurial ventures in rural areas producing healthy food and specialized high-value products. The base of their business is on the local offer and markets of the surrounding cities ("smart villages"). The effect of imitation is noticeable among households and small businesses in rural areas.

The Law on the Planning System of the Republic of Serbia from 2018 regulates the management of the public policy system and medium-term planning at all levels of government, which, among other things, contains the principle of publicity and partnership. It implies that during the development and implementation, analysis of the effects and evaluation of the effects of public policies, a transparent process of consultation with all stakeholders and target groups, including associations and other civil society organizations, research and other organizations.

Chapter 3: Key determinants of the regional/country governance system

a) Political conditions (strategic level)

Name of policy or strategy:	Agriculture and Rural Development Strategy of the Republic of Serbia 2014 – 2024
Relation to demographic change	The measures that support the objective of the Strategy: Improving the quality of life in rural areas and reducing poverty are directly related with demographic
Relation to rural development	Direct relation: objectives: Sustainable resource management and environmental protection; Improving the quality of life in rural areas and reducing poverty;
Relation to circular bioeconomy	The measures that support the objective of the Strategy: Sustainable resource management and environmental protection directly relate with circular bioeconomy
Implementation	The National program for agriculture and the National program for rural development, adopted to last up to 7 years and, and based on this, annual bylaws on the distribution of incentives in agriculture and rural development
Territorial level	National level and the level of Autonomous Province of Vojvodina
Interactions between levels	National programs and annual bylaws on national level, implementation on AP Vojvodina level, through public calls on the distribution of incentives in agriculture and rural development related to AP Vojvodina.

Relation to S3	The Strategy defines 4 priority areas, among them is the first priority: “Food for Future” supporting High-tech agriculture, Value-added food products, Sustainable food production chain
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Name of policy or strategy:	Industrial Policy Strategy of the Republic of Serbia from 2021 to 2030
Relation to demographic change	Indirect and direct supporting “urban” activities, such as manufacturing and services, taking place in rural settlements
Relation to rural development	Indirect
Relation to circular bioeconomy	Direct relation with objective: Industry transformation from linear to circular model
Implementation	Action plan is in a designing stage
Territorial level	National level
Interactions between levels	AP Vojvodina is included in development and envisage to be included in the implementation process
Relation to S3	Horizontal policies and measures in industrial strategy are complementary to vertical policy in S3 strategy

Name of policy or strategy:	Sustainable Urban Development Strategy of the Republic of Serbia until 2030
Relation to demographic change	Indirect through quality of life improvement
Relation to rural development	Indirect
Relation to circular bioeconomy	Direct through waste management improvement and boost green cities transformation
Implementation	First three-year Action plan is adopted
Territorial level	National level and local level
Interactions between levels	AP Vojvodina and 6 municipalities are included in strategy development. Some measures are planned to be implemented on national level (laws and bilaws), some on regional and local level (incentives, projects, education)
Relation to S3	Complementary

b) Legal conditions (operational level)

Serbia does not have a strategic document that deals thematically with the circular economy. However, a significant number of documents in a more or less direct way introduce the principles of circular economy into the regulatory framework of the Republic of Serbia.

Changes in the Law on waste management, adopted in January 2016, provided support to the concept circular economies and the creation of green jobs. The application of a waste management hierarchy as a first step towards a circular economy is introduced.

Law on Packaging and Packaging Waste and Accompanying Decree on determining the Packaging Waste Reduction Plan for the period from 2020 to 2024, defines general and specific objectives for the reuse and recycling of packaging waste.

Law on environmental protection adopted in 2012 regulates the integrated system of environmental protection which ensures the realization of the human right to life and development in a healthy environment and a balanced relationship between economic development and the environment in the Republic of Serbia. Amendments to the Law envisage the establishment of the Green Fund of the Republic of Serbia, as a budget fund that will, among other things, enable sustainable financing of the waste management system.¹³

The Law on Local Self-Government defines competencies, including those related to the obligation to adopt and implement programs of local economic development and environmental protection, provides the basis for cities and municipalities to deal with and support the circular economy.

c) Socio-economic conditions

Economic activity in Serbia in 2020, measured by real gross domestic product (GDP), recorded a decline of 1.1 percent compared to 2019. One of the reasons why the numbers are not too negative is that the food industry is doing well all the time. The tourism industry recorded an overall decline, with an increase in domestic tourism that could not compensate for the decrease in the number of foreign tourists (e.g. in September 2020 compared to September 2019 the number of overnight stays of domestic tourists increased by 18.8% and foreign tourists minus 76, 3%). But, it can be assumed that rural tourism had a positive balance, because the destination for domestic tourists in 2020 were rural areas. This trend is expected to continue.

The latest available data for October 2020¹⁴ shows that the average net salary amounted to about 511 euros. The median net salary amounted to about 400 euros, which means that 50 percent of employees in Serbia received a salary up to that amount. Also, residents of about 20 cities and municipalities in Serbia

¹³ [Interreg-danube.eu/ approved-projects/moveco](https://interreg-danube.eu/approved-projects/moveco)

¹⁴ RZS, Realize 25.01.2021

have been earning 170 % higher than the average salaries for month, showing the disparities among urban and rural areas.

Unemployment rate is 9% in 2019, but anti-Covid19 measures affected positively to unemployment rate (7,7% in the 2. quarter 2020). Covid19 didn't have particular effects on rural areas. The rural working-age population has higher activity and employment rates compared to the urban population. The reason for this is the fact that rural areas provide a greater opportunity to employ less educated people, which is especially true of their work in agriculture.

The Serbian Environmental Protection Agency (SEPA) and the Statistical Office of the Republic of Serbia (RZS) calculate and publish indicators to monitor progress towards a resource-efficient circular economy. As of 2014, RZS annually publishes, in the form of a statistical release, nationally aggregated economy-wide material flow accounts calculated by using Eurostat methodology²³. SEPA publishes a State of the Environment Report (SOER) every year, as well as annual thematic reports on the quality of air and water, waste management, state of soil, biodiversity, economic instruments, economic activities of importance for the environment, etc¹⁵.

d) Technological conditions

The coverage of the generation with higher education is 54.6%. In AP Vojvodina, the University of Novi Sad has a well-developed research infrastructure and great potential for innovation. It encompasses, among others, Faculty of Agriculture, Faculty of Technical Sciences, Faculty of Technology, Scientific Institute of Food Technology, BioSense Institute, and the Institute of Lowland Forestry and Environment as a solid infrastructure for further development of circular bioeconomy. Services for startups in bioeconomy are provided through acceleration programs (BioSense Accelerator) and incubation phase support (Business incubator Novi Sad, Backi Petrovac), co-working spaces etc. All this facilities and services are provided with the cooperation with science institutions. The Global Innovation Index report for 2020 evaluated the innovative performance of Serbia as much better than expected from a country with a GDP like Serbia's. In the section Knowledge Impact, which measures the influence of knowledge on the development of the economy, Serbia went up by as many as 16 places in 2020.

e) Environmental conditions

The impact of agricultural production on the environment was both positive and negative. With extensive ways of working in agriculture, picturesque and ecologically significant agricultural cultural landscapes have been formed with an impressive level of biological diversity in Serbia. On the other hand, the processes of agricultural intensification and abandonment of villages had detrimental effects. The Republic of Serbia does not yet have a national strategy for the protection of biological diversity or a

¹⁵ <http://www.sepa.gov.rs/>

specific agricultural policy to support the protection of ecosystems, the protection of natural habitats and the protection of endangered species, they are in the process of being drafted.

The condition of forests is generally assessed as satisfactory, with problems as: high prevalence of coppice forests (65%), prevalence of illegal logging, lack of data on privately owned forests and poor control of their use. There is practically no strategic document that defines forestry policy in an integral way. The Forestry Development Strategy of the Republic of Serbia from 2006 has not been revised since then, and it can hardly be said that it was ever put into operation. The reason for this is that an action plan has never been developed that would define the sources of financing and the dynamics of the implementation of this strategy. Forestry in Serbia is regulated by the Law on Forests. According to this law, the development of a forestry development program with an action plan is envisaged, as well as the development of development plans for six forest areas. None of these documents have been drafted or adopted.

The wastewater from households and industries is one of the most important pressures on the aquatic environment in Serbia, due to burden of organic matter and nutrients, as well as of hazardous and toxic substances. Most of the urban waste waters, about 58%, is collected by sewerage systems, 12% has treatment systems, and 46% of public sewerage systems are without treatment. Compared to the type of treatment, 1.3% of population is connected to primary (mechanical) treatment to remove suspended solids; 8.7% is connected to secondary (biological) treatment with aerobic or anaerobic decomposition of most of organic matter. Tertiary treatment covers 1.9% population, which are residents connected to the sewerage system in Subotica (Vojvodina)¹⁶.

The introduction of EU standards for environmental protection and climate change in Serbia is a long-term goal, among other things due to the high costs associated with the development of environmental infrastructure in the public sector as well as private companies and industries that are sources of pollution. But Serbian society supports and is aware that have to pay within available limits in order to obtain a better standard of environmental protection.

There is a clear need for some immediate measures for mitigation of negative impacts. Many civil organizations are very active in the field (Union of ecologists, Vojvodina Green Initiative, etc.), local eco-actions against the activities of the government or private investors that violate the environment: (“Do not drown Belgrade”, “Let's defend the rivers of Stara Planina”, etc.).

¹⁶ <https://www.sepa.gov.rs/download/radovi/2018/UrbanWasteWaterTreatmentDirectiveInSerbia.pdf>

Chapter 4: Stakeholder inventory

Stakeholder group	Public
Stakeholder subgroup	Regional government
Position in the network	<p>Regional government in APVojvodina is the major stakeholder concerning the bioeconomy, in particular Provincial secretariat for Agriculture, Water management and Forestry, Provincial secretariat for Energy, Construction and Transport and Provincial Secretariat for Economy and Tourism, Provincial Secretariat for Regional Development, . They participate in drafting laws, supporting the implementation of regional policies, monitor and provide information on relevant activities, create and implement of incentive measures and development projects.</p> <p>They cooperate with academia in supporting knowledge transfer to companies by organizing scientific events, fairs, etc.</p> <p>Cooperate also with enterprises and their associations by provision of incentives for the purchase of equipment, knowledge transfer and support for innovative programs.</p>
Importance for GoDanuBio	<p>The involvement of the Provincial Secretariats is important for GODANUBIO project particularly through their participation in the definition of specific regional policy agenda and prioritization of dedicated actions and participate in the policy dialog that will validate regional ecosystem mapping. They will also participate in the training on participative governance and co-creation workshops.</p>

Stakeholder group	Industry
Stakeholder subgroup	Industrial chambers
Position in the network	<p>Chamber of commerce of Serbia is organized through district branches and regional level Chamber of Commerce of Vojvodina. The Chambers are organization of economic entities that brings together the Serbian economy into a single system. They represents the interests of members by participating in the creation of laws and other regulations ; promotes economic cooperation with foreign countries; provide information and analytical support to the economy; encourages export and the involvement of domestic companies in international supply chains.</p> <p>CC cooperate with national/regional government in representation of the interest of industry in preparation of the legal/strategic</p>

	<p>documents, organization of fairs and other economic events in the country and abroad as well as in creating and implementing development projects.</p> <p>They have intensive cooperation with government and the academy by encourages the application of new technologies and knowledge in modern business and production.</p> <p>SCC Center for Circular Economy is informing, educating and preparing the economic environment for the transformation from linear into a circular economy.</p>
Importance for GoDanuBio	<p>SCC will facilitate identification of the actors that are neglected in the regional circular bio-economy and mapping of the regional ecosystem to identify regional influencing schemes of governance and actors of circular bio-economy.</p> <p>They will also participate in definition of policy agenda and policy dialogue related to new participatory governance models.</p>

Stakeholder group	Industry
Stakeholder subgroup	Clusters
Position in the network	<p>Cluster organizations in Ap Vojvodina, active in bio-based industry, are networks of companies and related stakeholders predominantly in agriculture, agro-food industry, industries such as pharmaceuticals, wood processing, energy sector, etc. These clusters have sectoral focus with relatively weak potentialities in gathering companies along the value chains. The role of clusters in shaping the bio-economy sector in Serbia is very limited and there is a need to reinforce their role to catalyze creation of inter- sectoral integration and new value chains in bio-based industries.</p> <p>Clusters cooperation with scientific research institutions in terms of experts support for the projects, launching initiatives for changing laws and regulations in the field of agriculture and rural development, organizing professional and promotional events, etc. Clusters also supports NGOs and local initiatives in the field of promotion of organic agriculture and rural development.</p>
Importance for GoDanuBio	<p>Clusters will support selection of best practices that already exist in Vojvodina and identification of gaps in the regional ecosystem. Additionally, it will participate in the activities of joint learning on the new models of participative governance through trainings and workshops.</p>

Stakeholder group	Academic
Stakeholder subgroup	Research and Education institutions
Position in the network	<p>Bioeconomy RDI scene in Serbia is characterized by the excellency in agriculture and food processing industries, substantial resources are devoted to biopolymer research within few Faculties and Institutes of the University of Novi Sad. University of Novi Sad with its 14 faculties and three institutes – Institute for food technologies, Institute of lowland forestry and Biosense institute is focused on education, scientific research and knowledge transfer. Environmental Engineering department of Faculty of Technical Sciences deals also with national and EU projects aimed at the development of the circular bio-economy.</p> <p>UNS has an extensive network of cooperation with scientific institutions and the industry through the implementation of various research projects. There is also intensive cooperation with the Provincial Secretariats in terms of expert support in the development of strategic and development docs and studies, knowledge transfer to the economy and implementation of projects.</p> <p>University also cooperates with chambers of commerce, industrial associations and clusters through transfer of knowledge and application of new technologies.</p>
Importance for GoDanuBio	<p>University experts are an excellent source of the knowledge, experience and best practice transfer concerning thematic topics of Godanubio project. UNS will take participation in the discussion on the Integration plan as well as in joint learning on participatory governance through co-creation workshops.</p>

Stakeholder group	Society
Stakeholder subgroup	NGO
Position in the network	<p>NGO organizations in Vojvodina active in circular bioeconomy are mainly local initiatives focused on environmental issues, sustainable rural development, development and promotion of local products, organic agriculture... The aim of these organization is to promote sustainable, creative and inclusive community development by promoting local values and potentials, connecting actors and creating a joint offer of local value-added products and tourist packages.</p>

	<p>They cooperate with local self-governments as well as regional government through implementation of various project, government provide funding for the projects.</p> <p>NGO cooperate with local organizations, agricultural farms and service providers in rural areas through projects and education. Cooperation with the academy has been realized in the field of knowledge transfer to local producers and service providers.</p>
Importance for GoDanuBio	<p>NGOs are important for the identification of the gaps in the regional ecosystem concerning the neglected stakeholders as well as best practices in the region. They will participate in Integration plan fine-tuning and in learning on participative governance and pilot co-creation workshops.</p>