



SEE-GL

SKILLS AND EMPLOYMENT
ENHANCEMENT IN GREEN LOGISTICS

Research Framework: ESG Industry Standards and
Practices in Transport and Logistics



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1. Introduction

The SEE-GL project seeks to thoroughly analyse and benchmark ESG (Environmental, Social, and Governance) standards and practices within the transport and logistics sector across five participating countries; Bosnia and Herzegovina, Croatia, Montenegro, Kosovo, and Slovenia, in order to identify best practices and highlight any existing gaps. Specifically, the project aims to investigate global ESG trends and evaluate relevant laws, regulations, and guidelines in each national context, thereby illustrating the different stages through which ESG principles are evolving in both EU member states and those aspiring toward deeper EU integration. Further, an important goal of the project is to provide local stakeholders with evidence-based insights that can inform more effective, context-specific strategies. By placing a strong emphasis on mapping out the roles and influence of various actors such as regulatory bodies, industry leaders, and vocational education institutions the project endeavors to paint a comprehensive picture of how ESG considerations can be integrated into day-to-day operations and decision-making processes. A critical component of this initiative is mapping out the roles and influence of diverse stakeholders who play an active part in shaping ESG adoption in each country. Policymakers, logistics service providers, academic institutions, and civil society organizations, involved in the transport and logistics industries, collectively form a complex network of actors whose contributions, challenges, and innovative solutions merit close examination. To capture these insights, the project employs quantitative methods (including survey and data analysis), generating thoughtful, evidence-based recommendations that address sector-wide ESG needs while remaining mindful of each country's unique economic and cultural setting. This ensures that any proposed interventions are both practically grounded and amenable to varied operational circumstances. Structurally, the project follows a six-section format to keep its inquiry systematic and logical. Starting with an Introduction that establishes context, aims, and defining concepts that frame all subsequent activities. Followed by a detailed Methodology, laying out the approach for data collection and analysis. Next come country-specific Literature Reviews, in which local ESG regulations, best practices, and implementation challenges are examined in depth. Stakeholder Identification and Mapping then offers a detailed view of key participants in the ESG space, complemented by the section, Survey Distribution and Data Collection that gather direct feedback and quantitative evidence regarding ESG adoption. These steps culminate in a Comparative Analysis, where both shared findings and unique national discrepancies are highlighted. Finally, the Conclusion distills these observations into a set of actionable recommendations, offering a clear path forward for institutions looking to deepen the integration of ESG concerns into training and operational structures. By taking this inclusive and methodical approach, the SEE-GL project ultimately aspires to create lasting improvements in sustainable and socially responsible practices throughout the region's transport and logistics sector.



2. Methodology

The research adopted a systematic approach designed to comprehensively analyze Environmental, Social, and Governance (ESG) standards and practices within the transport and logistics sectors across participating countries: Bosnia and Herzegovina, Croatia, Kosovo, Montenegro, and Slovenia. The methodology integrated qualitative and quantitative research methods to capture a multifaceted understanding of ESG integration in each national context, enabling a robust comparative analysis.

Initially, a detailed literature review was conducted to gather foundational knowledge and insights into existing ESG frameworks, national regulations, and documented best practices within each country. The literature review involved an extensive survey of academic journals, industry reports, policy documents, and government publications. This step aimed to contextualize ESG standards within each country, highlighting their unique economic, regulatory, and socio-cultural environments.

Following the literature review, stakeholder identification and mapping were carried out. This involved identifying key actors, including governmental and regulatory bodies, private sector companies, professional associations, international organizations, and educational and vocational training institutions. Stakeholders were categorized based on their influence, their current level of ESG adoption, and their potential role in advancing ESG principles within their respective sectors.

Quantitative data collection was conducted through surveys distributed among industry professionals, educational institutions, and regulatory bodies within each participating country. These surveys aimed to assess current levels of ESG awareness, identify barriers to ESG integration, evaluate existing ESG practices, and gauge the demand for specific ESG-related training and resources. The surveys targeted a diverse pool of respondents to ensure comprehensive representation and reliability of the collected data. The collected data then underwent rigorous analysis. Quantitative data were statistically examined to identify trends, patterns, and significant insights, which were complemented by qualitative findings derived from the literature review and stakeholder mapping. Comparative analysis highlighted similarities, differences, and key factors influencing ESG practices among the countries, facilitating the identification of best practices and areas requiring further development.

This methodological framework ensured an evidence-based approach to understanding ESG integration in transport and logistics sectors, ultimately leading to practical, contextually relevant recommendations. By following this systematic and inclusive methodology, the project contributed meaningful insights into advancing ESG practices and enhancing sustainability across the participating regions.



3. Literature Overview

The literature review conducted for this research provided a comprehensive understanding of Environmental, Social, and Governance (ESG) standards, regulatory frameworks, and best practices across the participating countries Bosnia and Herzegovina, Croatia, Kosovo, Montenegro, and Slovenia. This review encompassed academic research, industry analyses, governmental and non-governmental reports, and policy documentation, enabling an in-depth contextualization of ESG practices within the transport and logistics sectors of each country.

The reviewed literature identified varying degrees of ESG implementation across the region, reflecting differences in regulatory maturity, institutional support, and resource availability. Common challenges include limited awareness of ESG principles among industry stakeholders, regulatory complexity, financial constraints, and insufficient ESG-specific training opportunities. Despite these challenges, each country exhibited unique efforts and initiatives aimed at enhancing ESG adoption, highlighting opportunities for learning, collaboration, and advancement in regional ESG integration.



3.1 Bosnia and Herzegovina

The application of ESG standards in Bosnia and Herzegovina is becoming increasingly important for companies that want to maintain competitiveness in the market. Although these standards are recognized as key to the long-term sustainability of business operations, their implementation in the transportation, freight forwarding, and logistics sectors is still in the early stages. Bosnia and Herzegovina's transport policy incorporates some ESG elements but lacks effective implementation. Environmentally, sustainable transport solutions are underdeveloped, with minimal investment in greener alternatives like railways and inland waterways. Infrastructure projects prioritize capacity over sustainability. Socially, road safety is a major issue due to high accident rates and poor data tracking. Passenger rights remain weak, failing to meet EU standards. Governance challenges include weak regulations, particularly in rail and civil aviation, and a lack of independent oversight. Despite commitments to EU transport policies, enforcement and institutional support remain inadequate.[1] While these challenges persist on a national level, efforts are emerging at the local level through Sustainable Urban Mobility Plans (SUMP), which offer a structured approach to integrating ESG principles into urban transport systems. In Bosnia and Herzegovina, SUMP are still in the early stages of development. Cities such as Sarajevo and Bijeljina have already adopted SUMP, while others, including Banja Luka, Tuzla, Zavidovići, and Mostar, have initiated or plan to develop them. The introduction of these plans presents an opportunity to align local transport strategies with ESG standards, addressing environmental concerns, improving social inclusion, and enhancing governance in urban mobility planning. However, beyond SUMP, broader ESG adoption in the transport and logistics sectors remains largely unexplored. According to available information, there are no detailed analyses or reports specifically addressing the application of ESG standards in these sectors within Bosnia and Herzegovina. In general, Bosnian companies are aware of the need to align with ESG principles in order to remain competitive, especially in the international market. This was highlighted during a panel at the International Conference "Building a Sustainable BiH 2" held in Sarajevo in October 2024, where it was emphasized that companies will need to implement ESG standards to preserve their competitiveness.[2] The government of Bosnia and Herzegovina currently does not require or actively promote mandatory ESG disclosures from companies to increase transparency. Audit institutions, although formally independent, are often influenced by politics, which can affect the effectiveness of oversight.[3] A study by Delova-Jolevska and others, published in the journal *Sustainability*, examines how certain ESG elements impact economic growth in the countries of the Western Balkans, including Bosnia and Herzegovina. While it does not focus exclusively on the transportation and logistics sector, it provides insight into the broader impact of ESG factors on the region's economy.[4] The United Nations Development Programme (UNDP) in Bosnia and Herzegovina, in cooperation with the AIRE Center, published the "Business Guide to ESG Standards," which provides guidelines for implementing these standards across various sectors. Although the guide does not contain specific data for the transportation, freight forwarding, and logistics



sector, it can serve as a useful resource for companies looking to start applying ESG principles.[5] Regarding educational and training options, higher education institutions offer general courses on logistics, transport, and shipping, which include some topics on ESG, although not in great quantity. Additionally, there are initiatives by other institutions, with the most well-known being the International Academy of Sustainable Development [6]. The introduction of ESG standards in the transportation and logistics sectors in Bosnia and Herzegovina requires coordinated efforts from all relevant stakeholders, including the government, the private sector, and the academic community. Education and raising awareness about the importance of ESG, along with the development of appropriate policies and regulations, are crucial for the successful implementation of these standards and achieving sustainable development in the country.

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3.2 Croatia

Legal basis for reporting according to ESG principles

As a member of the European Union, the Republic of Croatia adopts and implements EU directives, and harmonizes appropriate laws in accordance with EU directives, including directives related to sustainability. The obligation to report on sustainability in the Republic of Croatia is prescribed by the Accounting Law (Zakon o računovodstvu), the Audit Law (Zakon o reviziji) and to a lesser extent, the Capital Market Act, and at the moment it is regulated and supervised by the Ministry of Finance. Both Acts are harmonized with CSRD Directive (EU) 2022/2464. It is also aligned with the European Green Plan and the associated regulatory frameworks and the EU Action Plan for the Circular Economy. The Directives as well as the above-mentioned Laws, oblige companies that are entities of public interest and have more than 500 employees to comply with the requirements of the Directive. Sustainability reports are prepared in accordance with ESRS standards, which are divided into 3 groups: E (environment), S (society), G (governance). The reports have to be published in the Management Reports section and must be available in digital format and marked (XBRL tagging) to be machine-readable. The reports are also subjected to audit.

Obligation to implement and report

From the beginning of 2025, with the deadline for submitting the report in 2026, large entrepreneurs who meet two of the three conditions are required to report: 25 million euros in assets, 50 million euros in revenue and 250 employees. In 2027, reports will be submitted by SMEs whose shares are listed on the stock exchange, small and simple credit institutions and their own insurance and reinsurance companies, and in 2029, by entrepreneurs outside the EU that generate sufficiently significant revenues through their subsidiaries.

The scope and role of reporting

Reporting will ultimately connect the entire process, which includes the obligation to report according to uniform standards, and connects financial institutions and sustainable financing, but also **cascading obligations through the supply chain and due diligence of all participants involved**. What is important for the implementation of the reporting process is that it will contain a detailed presentation of the calculation of revenues, capital and operating costs for taxonomically acceptable and unacceptable activities, and the implementation of the DNSH criteria (Does Not Cause Significant Harm) and minimum safeguards. Identification of impacts, risks and opportunities at higher and lower levels of the value chain is an integral part of the materiality assessment process - CSRD and ESRS, and collecting data on sustainability issues in the value chain is a challenge for most companies that require their suppliers to provide them. Through the supply chain of large systems that have an obligation to harmonize their operations – the process also extends to small and medium-sized companies. The main impacts or main risks and opportunities arising from the influence or dependence of the



reporting company often occur in its higher and/or lower levels of the value chain, and not in its own operations. Therefore, focusing on its own operations would only provide a partial picture of the impact on people and the environment associated with the activities, products and services of the entrepreneur and would not enable the appropriate identification of risks and opportunities.

ESG implementation in the Republic of Croatia

In line with the trend of ESG standardization in the world, several institutions are actively working on the promotion and implementation of ESG standards in the Republic of Croatia. Thus, the Croatian Chamber of Commerce has developed the Croatian ESG rating questionnaire, the aim of which is to create an enabling environment for the improvement of sustainable practices and standards in the Croatian economy by encouraging companies to monitor progress in achieving sustainable goals and applying increasingly advanced standards, but also to create a collaborative atmosphere. The Croatian Employers' Association, as well as the Croatian Chamber of Crafts and Trades, are actively working on providing educational services to their members in the field of environmental, social and corporate governance (ESG). The logistics industry encompasses a wide range of activities including transport, warehousing, inventory management, distribution and supply chain services. As a transit country between Central and Southeastern Europe and its coastal regions, Croatia is currently developing as a logistics hub. Unfortunately, intermodal connectivity between road, rail and maritime transport is still underdeveloped, which limits the efficient transport of goods. According to the World Bank's Logistics Performance Index (LPI), Croatia is ranked 43rd and is the best-ranked country in the region in the world of logistics. The fact that Croatia's potential in the transport and logistics sector is increasingly being recognized is clearly demonstrated by the fact that several logistics centers have been built in recent years, such as the new logistics and distribution center of the Orbico company, then RC Zone Samobor, as well as regional logistics warehouses of larger retail chains such as Lidl (near city Križ) and Plodine (near Rijeka). The Trans-European Transport Network (TEN-T) is also an important framework for development, integrating Croatia into pan-European transport corridors. Through TEN-T, Croatia is connected to other European countries, which encourages trade and investment. The main trends within the sector include increasing investment in infrastructure, especially in road and rail transport, to facilitate the transport of goods. Digitization plays a key role in the optimization of supply chains, with a particularly strong emphasis on efficiency, transparency and cost reduction. Although transport and logistics in our country and in our environment, face challenges such as the need for better coordination between countries, harmonization of regulations and solving infrastructural deficiencies, the logistics market in Southeast Europe remains promising and attracts investments precisely because of its potential for further growth. The improvement of infrastructure is of the utmost importance for increasing efficiency and reducing logistics costs. In accordance with increasingly strict market requirements, but also with the application of the directive on ESG reporting, the logistics sector requires a qualified workforce, especially in areas such as supply chain management, inventory management and transport, and in Croatia there is currently a lack of suitable specialists, which limits the possibility of growth. Growing concerns for sustainability and environmental protection require changes in logistics practices



towards reducing emissions, as well as applying sustainable technologies and optimizing the use of resources. In addition, digitization is key to the modernization of the logistics sector, including the application of smart technologies for tracking and managing goods, inventory management and transport optimization.

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3.3 Kosovo

Kosovo's commitment to sustainability and its aspiration for European Union integration necessitate a deeper understanding and adoption of Environmental, Social, and Governance (ESG) principles. This document provides a theoretical foundation by examining existing ESG standards, frameworks, and best practices within the transport and logistics sector. The analysis highlights the current state of ESG integration in Kosovo, identifying gaps and opportunities for improvement while aligning with regional and international objectives. Kosovo's adoption of ESG principles is shaped by its aspiration for European Union integration, aligning with frameworks like the EU's Green Deal and the Western Balkans Green Agenda. Regulatory initiatives such as the National Environmental Action Plan (NEAP) and the Pristina Green City Action Plan^[1], developed in cooperation with the European Bank for Reconstruction and Development (EBRD), focus on sustainability in urban mobility, energy efficiency, and waste management. Specific projects like the "Pristina Urban Transport II"^[2] initiative, supported by the EBRD, aim to enhance the capacity and sustainability of public transport infrastructure. Similarly, the "Livable Cities Project"^[3] from the World Bank supports public transport improvements and green infrastructure to tackle urban environmental challenges. Research from the Southeast Europe Regional Transport Observatory (SEETO)^[4] highlights the substantial contribution of Kosovo's transport sector to GHG emissions. SEETO emphasizes the need for green logistics practices, such as optimized transport routes and fuel-efficient technologies, to reduce emissions and operational costs. Studies published in the Journal of Southeast European Studies note the gaps in vocational education and training (VET) curricula, particularly in integrating ESG-specific competencies for the transport and logistics sector. Although resource constraints hinder implementation, the Kosovo Environmental Protection Agency (KEPA)^[5] reports underline the importance of robust regulatory frameworks for promoting sustainable practices. Local firms are beginning to adopt digital tracking systems to monitor fuel consumption and optimize delivery routes, aligning with global trends in ESG compliance. However, the adoption of renewable energy solutions, such as electric



vehicles, remains limited due to high costs and low governmental incentives. Adopting green logistics practices has the potential to lower operational costs and enhance the profitability of businesses in the transport sector. Furthermore, sustainability-driven initiatives like “Greening BKT Kosova”[6], supported by the Green Growth Fund, illustrate how financial institutions are leveraging ESG strategies to improve efficiency and stakeholder trust. ESG implementation bolsters the reputation of firms and aligns them with international standards, attracting partnerships and investments. Public-private partnerships, as noted by the World Bank and EBRD[7], are essential for bridging infrastructure gaps. The Ministry of Education, Science, Technology, and Innovation (MESTI) has taken initial steps to incorporate sustainability topics into VET curricula. However, these efforts lack specificity for the transport and logistics sector. Academic projects, such as those by students from ESILV[8], focus on sustainability through IoT, green technologies, and mobile development. This literature review highlights Kosovo’s ESG standards, practical implications in the transport and logistics sector, and emerging training programs. It underscores the importance of green logistics, regulatory frameworks, and digitalization in addressing environmental challenges while fostering socio-economic development. Further emphasis on tailored educational initiatives and incentivizing renewable energy adoption could significantly advance Kosovo’s ESG objectives.

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3.4 Montenegro

Montenegro is on the path to EU accession, and has made great strides along the way. One of the key developments has been the efforts made in updating current regulations and practices in all areas. The key document in this regard is the ambitious Transport development strategy 2019–2035 with action plan 2019–2020 (1), developed through the collaborative efforts of the University of Montenegro and the Ministry of Transport, Maritime Affairs and Telecommunications. With this strategy, Montenegro seeks to establish, among other key points, ESG directives, including TEN-T (Trans-European Transport Network) objectives, EU Green Deal principles, National Sustainable Development Strategy 2030 (NSSD) and the Strategic Environmental Impact Assessment (SEA). Montenegro aims to minimize the country’s carbon footprint, noise pollution, and environmental impact. Another facet of this Strategy is the adoption of alternative fuels, green transport technologies, and digital traffic management systems.



One such solution is the development of Intelligent Transport Systems (ITS) to offer digital solutions to optimize traffic flow, reduce emissions, and improve safety.

The Law on Strategic Environmental Impact Assessment requires all transport projects to undergo environmental assessment, whereas the Law on Road Transport implements EU vehicle emission standards and regulates freight transport sustainability. The Law on Railway Transport Safety and Interoperability pushes rail transport baseline to meet EU safety and environmental directives. Last but not the least, the Law on Maritime Navigation Safety builds towards compliance with MARPOL and SOLAS conventions for reducing maritime pollution. Within the same Strategy document, priority is given to sustainable transport projects through the Single Project Pipeline, and EU IPA II Funding available for investments in low-carbon transport, electrification, and eco-friendly infrastructure. The Strategy document also sets out priorities in research, namely rail electrification and modernization to enhance sustainability, Ports of Bar and Kotor green port initiatives and urban mobility planning. The Strategy intends for sustainable transport projects improve connectivity, job creation, and economic growth and for green transport and blue economy to reduce long-term operational costs and improve public perception. ESG training in transport management and public-private partnerships to support green innovations are also aims of the 2019-2035 strategy of Montenegro. However, the OECD Western Balkans Competitiveness Outlook 2024: Montenegro report (2) finds that there are delays in the implementation of this Transport Development Strategy, due to no action plan past 2022, and no actionable items since 2020. While the 2024 report does state progress is made especially on the integration of sustainability objectives into existing frameworks, it is slower than forecasted. Road safety remains a concern as accidents with fatalities have increased significantly since 2020, currently double the EU standard of 46 per million. The 2024 EU Commission Montenegro report (3) also makes mention of the Law on Waste Management and that the country is working on implementing the National Energy and Climate Plan (NECP). The Commission report lauds the Transport Community Treaty, to modernize transport infrastructure and improve road safety. Both these policies, although not specifically ESG-focused, have environmental and social implications, such as reducing carbon emissions and improving public safety. The Commission report also points out that Montenegro is working on aligning its energy policies with EU standards, including the Energy Performance of Buildings Directive and the Electricity Integration Package to reduce greenhouse gas emissions and promote sustainable energy practices. In their 2021 paper, Nikčević and Škurić (4) point out that the National Strategy for Integrated Coastal Area Management (NSICAM) has been developed to promote sustainable use of coastal resources, including fisheries, maritime transport, and tourism. The Strategy for the Development of Maritime Industry (SDMI) 2020–2030 seeks to cover all economic activities related to the sea, for sustainable maritime growth. The 2013 Law on Maritime Navigation Safety for pollution control and safety measures in maritime transport, the 2011 Law on the Prevention of Sea Pollution from Vessels (2011) to minimize pollution from ships and the National Plan for Emergent Reaction in the Event of Sea Pollution are parts of the legal framework that directly pertain to the protection of the long-term health of the Montenegrin maritime transport. Another important document charting the path of Montenegro towards sustainable development is the 2021 Third Biennial Update Report



of Montenegro, co-written by the Government of Montenegro and the UNDP (5), which reiterates the commitment of Montenegro to sustainable development and climate action, as demonstrated by its ratification of the Paris Agreement (2017) and submission of Nationally Determined Contributions (NDCs). The report mentions the Montenegrin aims to decarbonize transport and logistics, improve green infrastructure and energy-efficient transport and implement Monitoring, Reporting, and Verification (MRV) systems. The ESG regulations mentioned in the Report are the National Energy and Climate Plan (NECP, Draft), which defines renewable energy and emission reduction targets for transport and logistics, the Revised Nationally Determined Contribution (NDC, 2021) aiming for 35% GHG emissions reduction by 2030, and the National Adaptation Plan (NAP) for climate resilience. The report also recognized the limited Montenegrin-authored ESG studies on logistics, though universities contribute to sustainability research in transport policy. Public-private sector partnerships are fostering ESG-driven training programs, while government and UNDP initiatives support climate policy education, though not systemically. In the private sector, institutions such as American Chamber of Commerce Montenegro and Addiko Bank have their own ESG initiatives.

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3.5 Slovenia

Slovenia's transport and logistics sector is undergoing a significant transformation by integrating Environmental, Social, and Governance (ESG) principles into its operational, regulatory, and strategic frameworks. As global pressures to adopt sustainable practices intensify, Slovenian stakeholders are aligning their efforts to promote green logistics, improve environmental performance, and enhance social and governance outcomes. This article examines how national regulatory frameworks, innovative policy initiatives, and industry-specific practices drive the adoption of ESG standards within Slovenia's transport and logistics sector. The resulting reforms stimulate operational efficiencies and offer new opportunities for sustainable investment while addressing the country's infrastructural and environmental challenges. This research builds on a comprehensive review of studies and policy analyses, ranging from the EU Non-Financial Reporting Directive's impact on corporate social responsibility (CSR) to green logistics strategies



and fiscal responses to crises such as COVID-19. By collating empirical findings and case studies, the article provides an in-depth analysis of Slovenia's unique position within Southeast Europe and its commitment to ESG principles. Slovenia's transport and logistics sector operates within a robust regulatory context driven by EU directives and national policy initiatives. The EU Non-Financial Reporting Directive (2014/95/EU) has been a critical catalyst in enhancing transparency and compelling companies to adopt more comprehensive CSR practices. Slovenia's adherence to these directives is particularly noteworthy, given that the strength of its legal system significantly amplifies the Directive's positive effects on CSR transparency and performance, especially when combined with a "comply or explain" approach (Črnjar et al., 2020; Filipič & Škrinjar, 2022). The evolving legal framework in Slovenia includes the Corporate Sustainability Reporting Directive (CSRD) and various national legislative instruments that mandate higher standards of environmental and non-financial reporting. These regulations require companies to disclose detailed information regarding their environmental impact, social policies, and governance practices, thus ensuring that stakeholders have access to reliable data for decision-making. Recent enhancements in reporting standards have led to observable improvements in the quality of sustainability disclosures among non-financial firms in Slovenia, particularly in smaller enterprises where rigorous reporting was previously less common (Bratkovič Kregar et al., 2019; Primec & Belak, 2020). Furthermore, Slovenia's regulators have actively supported the integration of ESG considerations into the broader national economic strategy. Initiatives aimed at fostering a green economy have been reinforced through policy incentives, fiscal support measures, and public-private partnerships that target sustainable practices in the transport and logistics sectors. This multi-level governance model facilitates the effective implementation of ESG principles across various industries. Environmental sustainability is a cornerstone of the ESG transformation in Slovenia's transport and logistics sector. The sector faces numerous challenges, such as high reliance on road transport and underdeveloped intermodal networks. However, industry actors, particularly leading logistics companies like Port Koper and Post Slovenia, have made significant strides in transforming business practices through green initiatives. One primary initiative involves implementing green logistics strategies. Research has demonstrated that smaller firms and companies closely monitored by financial analysts have experienced considerable improvements in CSR performance due to the EU Non-Financial Reporting Directive. This improvement stems from enhanced environmental disclosure and adopting innovative technologies and process innovations that reduce energy consumption and waste production (Primec, 2021; Tušek et al., 2022).

Key green logistics practices include:

- **Waste Reduction and Energy Efficiency:** Strategies to reduce energy consumption, use alternative fuels, and modernize transport fleets (Družić et al., 2021; Knezevic et al., 2024).
- **Intermodal Transport Development:** Initiatives aimed at integrating rail, maritime, and road transport through green transport corridors (Mastilica et al., 2024; Zaucer et al., 2023).
- **Sustainable Infrastructure Investment:** Efforts to modernize and expand transport infrastructure to support green logistics initiatives (Abdić et al., 2023).



These initiatives are supported by public policy measures that promote sustainable logistics practices. EU and national funds, along with incentive schemes, encourage logistics companies to transition toward greener operations. These initiatives reduce systematic risks and improve the sector's sustainability performance.

In addition to environmental measures, the social component of ESG is integral to Slovenia's transformation of its transport and logistics sector. Social initiatives aim to enhance workforce capabilities, ensure safe working conditions, and contribute to broader societal benefits, such as improved community wellbeing and regional development. Workforce development has been a key priority. Companies with robust sustainability practices tend to invest significantly in employee training, education, and development programs. In Slovenia, logistics companies have incorporated social sustainability into their operational plans by:

- **Employee Training and Education:** Comprehensive training programs focus on health and safety, technical upskilling, and adopting new green technologies (Družić et al., 2021; Ferjan et al., 2023).
- **Equal Employment and Diversity:** Emphasis on ensuring equal opportunities and safe working environments, promoting non-discrimination and gender diversity in management (Bavec & Bavec, 2016; Svetlik et al., 2017).
- **Community Engagement and Social Support:** Active support for local communities through donations, supporting local population welfare, and developing sustainable infrastructure (Klančnik, 2021; Trilar et al., 2020).

These initiatives improve the social fabric of the industry. Employee-centric policies, coupled with community engagement, build a culture of sustainability that extends beyond environmental performance to include workforce wellbeing and societal advancement. The integration of social sustainability reflects a shift towards a more inclusive, resilient, and human-centric business model. The governance pillar of ESG ensures that sustainable practices are effectively implemented and continuously improved. In Slovenia's transport and logistics sector, governance enhancements are driven by regulatory reforms and the adoption of advanced digital solutions. Slovenia has established a solid foundation for corporate governance through regulatory frameworks that mandate comprehensive ESG reporting. The implementation of the EU Non-Financial Reporting Directive and national regulations such as the CSRD emphasize transparent reporting and accountability (Bratkovič Kregar et al., 2019; Črnjar et al., 2020). Governance improvements are evident in aligning agency theory with sustainable economic paradigms. Harmonizing stakeholder interests with long-term sustainability goals requires standardizing non-financial information and innovative models such as the Regulation Curve Model® (Aragonés-Jeremías et al., 2023; Baranova et al., 2018). The COVID-19 pandemic underscored the significance of fiscal policies in stabilizing economies, particularly in small open economies like Slovenia. Fiscal policies aimed at wage subsidies, income support, and extended furlough measures were crucial in cushioning the transport and logistics sector during the crisis (Bekő et al., 2021; Sambt, 2021). Positive spillover effects from these fiscal policies are evident in reduced systematic risks and lower costs of equity among firms that diligently adopted CSR reporting in response to regulatory mandates (Primec, 2021). Digital transformation of public services has emerged as a key enabler of improved ESG performance. The adoption of e-government systems in Slovenia has streamlined administrative processes



and enhanced accountability and transparency in public procurement and regulatory oversight (Bobek et al., 2015; Glušič et al., 2018). Digitalization facilitates accurate ESG measurement and reporting, empowering stakeholders with timely information. Advanced digital platforms have supported adopting green procurement practices, coordinating public–private partnerships, and encouraging financial institutions to develop green finance products tailored to sustainable logistics investments (Glušič et al., 2017; Pucihar et al., 2021). In conclusion, Slovenia's regulatory landscape, shaped by EU directives and national policies, is pivotal in driving ESG adoption within the transport and logistics sector. The emphasis on enhanced transparency and CSR practices, underpinned by a robust legal system, ensures greater accountability and sustainability reporting among firms. Environmental initiatives, particularly green logistics strategies, are crucial in mitigating the adverse impacts of Slovenia's transport sector. By focusing on waste reduction, energy efficiency, intermodal transport development, and sustainable infrastructure, Slovenia is making strides towards a more environmentally sustainable and resilient logistics ecosystem. The social dimension of ESG plays a vital role in Slovenia's transport sector by enhancing workforce capabilities, ensuring safe working conditions, and promoting community engagement. These initiatives foster a more inclusive and human-centric business model that contributes to societal wellbeing and long-term sustainability. Strong governance structures, supported by targeted fiscal policies and digital transformation, are essential for effectively implementing and continuously improving ESG practices in Slovenia's transport and logistics sector. By promoting transparency, accountability, and data-driven decision-making, these elements ensure that the sector is well-equipped to meet sustainability challenges while remaining competitive and resilient.



4. Stakeholder Identification and Mapping

4.1 Bosnia and Herzegovina

1. Government and Regulatory Bodies in Bosnia and Herzegovina

- **Ministry of Communications and Transport of Bosnia and Herzegovina:** is responsible for developing and coordinating state-level policies in transport, telecommunications, and postal services. It oversees regulatory alignment with EU standards, infrastructure planning, and international cooperation in these sectors. The Ministry also ensures transport safety, technical standards, and sustainable development across all modes of transport.
- **Ministry of Transport and Communications on the entity levels:** is responsible for developing and implementing transport and communication policies at the entity level. This includes road, rail, air, and water transport infrastructure, traffic safety, and regulatory oversight. The Ministry also coordinates with state institutions and international partners to support sustainable mobility and improve transport services.
- **Ministry of Transport and Communications on the Cantonal levels:** Responsible for developing and implementing the Road Safety Program in the region. It also conducts traffic intensity measurements on public roads and oversees the creation and maintenance of road infrastructure while regulating transport, telecommunications, and public safety standards within the canton. Its role includes planning, developing, and maintaining roads and public transportation systems, ensuring road safety, and implementing transportation policies in line with the canton's need.
- **The Chamber of Commerce of the Federation of Bosnia and Herzegovina** is an organization that represents the interests of businesses and industries within the Federation. Its role includes supporting economic development, promoting trade and investment, providing business services, and advocating for favorable policies and regulations for the business community.
- **The Foreign Trade Chamber of Bosnia and Herzegovina** represents businesses engaged in foreign trade, promoting international trade, facilitating exports and imports, and advocating for policies that enhance Bosnia and Herzegovina's global economic integration. Additionally, the chamber actively promotes the implementation of ESG standards, raising awareness among businesses, supporting ESG adoption, and encouraging companies to integrate these practices to boost long-term growth and global competitiveness.



- **Employment Service of the Central Bosnia Canton– Bureau Kiseljak** is a public institution established to facilitate employment services and support the labor market in the Central Bosnia Canton. Its role includes mediation in employment, providing information on job opportunities, conducting professional orientation and retraining programs for unemployed individuals, issuing work permits for foreign nationals, and cooperating with educational institutions to align training programs with employer needs.

2. Companies (Public Sector) in Bosnia and Herzegovina

- **Public Company Railways of the Federation of Bosnia and Herzegovina Ltd. Sarajevo** is a state-owned company responsible for domestic, inter-entity, and international passenger and freight transport, including combined transport. Its role includes the maintenance, reconstruction, and modernization of railway infrastructure, rolling stock (including locomotives), and other necessary equipment to ensure the safety and efficiency of railway traffic and transportation services.
- **JP BH POŠTA d.o.o. Sarajevo** offers parcel services, which include the receipt, transfer, and delivery of packages addressed to a specific recipient within Bosnia and Herzegovina and internationally. The company provides different types of packages, including regular and value-marked packages, with specialized services like BH POSTEXPRESS for fast and secure domestic deliveries, and EMS for international deliveries.

3. Companies (Private Sector) in Bosnia and Herzegovina

- **Englmayer BH d.o.o. Sarajevo** is a company specializing in international shipping, logistics, and transport services, offering customized logistics solutions. As an independent, family-owned business with over 160 years of experience, it operates with a strong focus on sustainability, quality, and customer satisfaction, while fostering a culture of respect for clients, partners, and employees.
- **General Logistic Sarajevo** is a logistics company providing a range of services including road transport, rail transport, seafreight, and airfreight. With expertise in logistics demands and market trends, the company offers general and bonded warehousing, safe storage solutions, and professional customs procedures for import and export. It has developed a domestic delivery network with a 24-hour express delivery service across Bosnia and Herzegovina to meet the demands of the market.
- **ALMY TRANSPORT d.o.o.** has been connecting Bosnia and Herzegovina with European countries through road freight transport for over twenty years. With accumulated experience and a continuously expanding fleet, Almy Transport offers fast, economical, and safe delivery of goods to various European destinations, handling partial and full loads, palletized or non-standard cargo, and hazardous materials (ADR), ensuring reliable and timely deliveries through skilled dispatchers and modern equipment.



- **Transkop d.o.o.** is a private company founded in 1991, specializing in domestic and international freight transport, warehousing, and local distribution. With a fleet of 40 vehicles, including 16 trucks, 2 solo trucks, 18 trailers, and 4 delivery vehicles, Transkop offers comprehensive transportation solutions to and from EU countries, along with 6,000 m² of parking space and 1,000 m² of warehouse space, including a 400 m² bonded warehouse. The company also provides customs services, assisting with import/export procedures and offering tailored logistics solutions for packaging, storage, insurance, and freight forwarding.
- **Mozzart d.o.o. – Logistics Sector** is part of the largest provider of gaming services in Southeast Europe. The company's business policy is based on modern principles, continuous service improvement, and innovation, seeing uniqueness as a key imperative.
- **Cargo-partner d.o.o. Sarajevo** offers a wide range of international freight transport, logistics, customs brokerage, freight forwarding, and warehousing services across various industries. With a global partner network, the company provides road, air, sea, and rail transport solutions, including specialized services for dangerous goods, temperature-controlled shipments, oversized cargo, and pet transport. Additionally, its supply chain management platform (SPOT) ensures full transparency and real-time shipment tracking.
- **Interšped Logistics Sarajevo** provides international freight forwarding, customs brokerage, warehousing, and distribution services. The company specializes in road, air, sea, and rail transport, ensuring efficient and reliable logistics solutions for businesses. With a strong focus on customs procedures, storage, and supply chain optimization, Interšped Logistics Sarajevo supports seamless trade operations within Bosnia and Herzegovina and internationally.
- **Milšped BiH (Sarajevo, BiH)** provides the services of customs brokerage and international transport of full and partial loads. Milšped BiH also has a cross-dock warehouse at its disposal. The branch office in Sarajevo has been operating with great success in the territory of Bosnia and Herzegovina for nine years.
- **Samer & Co. Shipping d.o.o. Sarajevo** offers tailored transport solutions, specializing in pharmaceutical and beauty product logistics with temperature-controlled supply chains, supported by its Good Distribution Practice (GDP) certification. The company provides ocean, air, rail, and road shipments, door-to-door delivery, project cargo handling, reefer goods storage, customs brokerage, cross-trade, insurance, and cargo inspections.
- **BRANEX d.o.o. Busovača** is a company engaged in transportation and logistics services, providing reliable and efficient freight transport solutions. With a focus on quality and professionalism, the company offers domestic and international transport, ensuring safe and timely delivery of goods.
- **F&Ž Runkle Busovača** is a company specializing in transport and logistics services. It provides reliable freight transportation, ensuring the safe and efficient delivery of goods both domestically and internationally.
- **Boreas d.o.o.**, a member of the Stanić Group, is a leading distributor of globally recognized brands of non-alcoholic and alcoholic beverages, as well as tobacco products in Bosnia and Herzegovina. The company operates seven distribution centers, maintains a fleet of over 350 commercial vehicles, and employs more



than 500 staff. With a warehouse space exceeding 19,000 square meters, Boreas serves over 8,000 partners.

- **Duno Lit d.o.o.**, based in Kiseljak, was founded in 1987 and specializes in processing natural stone, including marble and granite. Their products are available throughout Bosnia and Herzegovina and internationally in markets such as Croatia, Serbia, Montenegro, Slovenia, Austria, Germany, and the United States.
- **Sarajevski kiseljak** is a leading producer of natural mineral water and refreshing beverages in Bosnia and Herzegovina. In terms of logistics, the company utilizes an efficient distribution network to ensure timely delivery of its products while optimizing transportation to reduce its environmental footprint.
- **Bučan Transport d.o.o. Sarajevo** is a company specializing in transport, logistics, and freight forwarding services.
- **Čadoprevoz** is a transportation company based in Tuzla, with over 20 years of experience in both international and domestic transport. The company operates a fleet of 50 vehicles, including 30 MEGA trailers and 20 standard trailers, servicing various European countries while adhering to EURO-6 emissions standards and providing GPS tracking and CMR insurance for all vehicles.
- **Dumi-šped d.o.o. Livno** company provides customs clearance services and domestic and international road transport, offering transportation services.
- **Euro-Express d.o.o.** is a domestic company founded in 2007, specializing in postal and courier services. Their core operations include both domestic and international transport, as well as customs brokerage. The company focuses on providing efficient logistics solutions, ensuring customs compliance, optimizing transport networks, and offering reliable services for both local and global logistics needs

4. Educational and Training Institutions in Bosnia and Herzegovina

- **University College “CEPS-Center for Business Studies” Kiseljak, Transport and Traffic Engineering study program** offers programs in logistics, shipping, transport engineering, and sustainability, with research focused on ESG practices in the transport and logistics industry. Plays a key role in educating the next generation of professionals to integrate sustainability into transport systems.
- **Faculty of Traffic and Communication, University of Sarajevo:** plays a role in offers study programs in transport, logistics, and communication systems, aligned with the needs of goods and information exchange. The Faculty contributes significantly to the economic development of Bosnia and Herzegovina through education and research in system management and technological advancement in transport and communications
- **Faculty of Transport and Logistics, University of Mostar:** Offers study programs focused on transport, logistics, and supply chain management, preparing students for roles in the dynamic field of mobility and goods flow. The Faculty combines technical and organizational knowledge to support sustainable development, infrastructure efficiency, and integration with modern European transport systems. Through education, research, and cooperation with the



business sector, it plays a key role in advancing professional practices and regional economic growth

- **College “Logos center” Mostar, Transport and Traffic Engineering study program** offers programs in logistics, shipping, and transport engineering. Provides the best service to its students, prioritizing their needs to create a motivating learning environment.
- **The Ministry of Education, Science, Culture, and Sport of the Zenica-Doboj Canton, through the Department for Traffic Education**, is responsible for organizing and overseeing traffic education programs within the canton. This includes the development of curricula, promoting road safety awareness, and ensuring the effective implementation of traffic education initiatives in schools and other institutions

These stakeholders actively contributed by filling out surveys regarding the integration of ESG principles within Bosnia and Herzegovina’s transport and logistics sector, fostering a more sustainable and responsible industry.



4.2 Croatia

Croatia's T&L, implementing ESG practices involves a diverse array of stakeholders, each playing a crucial role in advancing sustainability and ethical standards. Key stakeholders include:

1. Government and Regulatory Bodies

- **Ministry of Sea, Transport, and Infrastructure (MMPI):** Oversees national transport policies and infrastructure development, addressing challenges such as sector planning and project development.
- **Ministry of Environment and Energy (Ministarstvo zaštite okoliša i energetike):** Regulates environmental standards and works to ensure the transport and logistics sectors comply with environmental laws, focusing on air quality, emissions, and energy use
- **Ministry of Finance:** Manages funding and financial oversight mechanisms for transport projects, ensuring alignment with ESG objectives.
- **Croatian Agency for Environment and Nature (HAOP):** Provides oversight on environmental protection, ensuring compliance with environmental regulations and promoting the adoption of sustainable practices in the transport and logistics sector.
- **Croatian Chamber of Commerce (HGK):** A key actor in shaping economic policies and regulations, the HGK often works with transport and logistics companies to help them integrate ESG practices into their business models.

2. Companies (Private Sector)

Transportation & Logistics Companies:

- **AD Plastik** – Major supplier to the automotive sector, engaging in sustainability efforts, which considers Corporate Social Responsibility as part of the business model and one of the most important components of the company's development policy
- **Hrvatske Ceste** – Operates Croatia's road infrastructure and implements sustainable transport initiatives, from 2024. actively working on the development of the ESG sustainability strategy of the Croatian motorways.
- **DPD Croatia** – Courier and logistics company working on sustainability goals, which strives to make delivery on a global, as well as local, level carbon-neutral and are the first global delivery company to have its CO2 reduction targets approved by the Science Based Targets initiative (SBTi).
- **Croatia Airlines** – The national airline, increasingly focusing on reducing its carbon footprint and engaging in sustainability projects, as well actively training its staff.
- **Croatian Post (Hrvatska pošta)**, in accordance with the Corporate Strategy Pošta2025, works intensively on green transformation and reduction of harmful



emissions and negative impact on the environment, and continues to contribute to the community, workers, and users through socially responsible business and sustainable development. They use electric vehicles in their work and encourage alternative delivery methods, optimize routes and recycle as much as possible. Croatian Post also participates in international initiatives for environmental protection, such as The Climate Pledge and IPC's SMMS program.). Croatian Post's delivery vehicles cover more than 52 million kilometers per year, of which almost 5 million are green. Green kilometers are covered by electric vehicles, bicycles and delivery on pedestrian areas. It also participates in the International Postal Corporation's (IPC) SMMS program, which aims to reduce carbon emissions by 50% compared to 2019 levels and to have a fleet with at least 50% alternative fuel vehicles, of which 25% are electric, by 2030. These goals of reducing and ultimately eliminating harmful environmental impacts, along with parcel machines as a green delivery channel of Croatian Post, they believe that they can help preserve our planet as a quality place for future generations to live.

Green Logistics & Sustainability-Driven Startups:

- **Ecofleet** – Provides fleet management and solutions for sustainable transportation.
- **DHL Croatia** – Part of the global logistics giant, DHL is actively involved in reducing carbon emissions and integrating sustainable solutions.

3. Educational and Training Institutions

- **University of Zagreb, Faculty of Transport and Traffic Sciences:** Offers programs in logistics, transport engineering, and sustainability, with research focused on ESG practices in the transport and logistics industry. Plays a key role in educating the next generation of professionals to integrate sustainability into transport systems.
- **RIT Croatia (formerly known as the Croatia Branch of Rochester Institute of Technology):** Provides programs in business and sustainability, including logistics and transport management, with an emphasis on ESG integration in business practices.
- **Zadar University, Department of Maritime Studies:** Focuses on the sustainable management of maritime transport, offering programs that train professionals in eco-friendly shipping and logistics practices.
- **Croatian Employers' Association (HUP):** Provides training and guidance for companies on adopting sustainable practices and aligning with ESG standards, particularly in the logistics sector.
- **Croatian Institute for Sustainable Development (CISD):** Focuses on promoting sustainable practices across various sectors, including transport, and providing training programs on ESG-related topics.

These stakeholders collectively drive the integration of ESG principles within Croatia's transport and logistics sector, fostering a more sustainable and responsible industry.



4.3 Kosovo

The map of stakeholders in ESG implementation in the transport and logistics sector in Kosovo shows significant involvement from government institutions, international organizations, private companies, and the education sector. Projects such as urban transport and the modernization of railway infrastructure are important examples. Key initiatives include reducing carbon emissions, increasing the use of electric vehicles and developing sustainable technologies. However, challenges lie in ensuring compliance with international standards and raising awareness of ESG.

1. Government and Regulatory Bodies

- **Ministry of Infrastructure and Transport (MIT):**

Role: Design and implement transportation policies in accordance with sustainability standards.

Initiative: Has developed the 'Multimodal Transport Strategy 2023-2030', which aims to create an integrated, sustainable and green transport system

Impact: High; sets the strategic direction for the development of transport infrastructure in the country

- **Municipality of Pristina:**

Role: Urban transport management and promotion of sustainable initiatives.

Initiative: In collaboration with UNDP, implemented the 'Give your car (and your wallet) a break' campaign to encourage the use of alternative means of transport.

Impact: High at local level; promotes sustainable urban transport practices.

2. Public and Private Enterprise:

- **Trainkos:** Transport operator railway in Kosovo. Has benefited by Investment about infrastructure modernization railway. Improves regional connections and promotes sustainable transport.
- **Urban Traffic:** Urban public transport operator in Prishtina. Modernization of the fleet with 51 new buses to reduce emissions. At level local contributes to reducing pollution and improving services.

3. International Organizations and Donors:

- **European Bank for Reconstruction and Development (EBRD):** Project financier of the sustainable infrastructure. Has financed projects like 'Pristina Urban Transport II'. Supports infrastructure development of sustainability.
- **United Nations Development Program (UNDP):** Promoting development the sustainable and initiatives environmental. Campaign for the use of public transport and sustainable alternatives. Raises awareness and promotes sustainable practices.



4. Educational and Training Institutions:

- **Tempulli Academy:** Provides educational and research programs in the field of transportation engineering. Provides professional training in the field of transportation and logistics. Courses and training that focus on sustainable transportation technologies. Prepares professionals with a focus on sustainable practices.
- **University of Prishtina - Faculty of Mechanical Engineering:** Provides educational and research programs in the field of transportation engineering. Courses and trainings that focus on sustainable transportation technologies. Prepares professionals with a focus on sustainable practices.

5. Professional Associations and Organizations:

- **AMRKS:** Represents the interests of road transport companies. Develops training for drivers on sustainable practices. Influences policies and involves key stakeholders.
- **Association for the Promotion of Renewable Energy and Energy Efficiency in Kosovo (APEEREK):** Supports the use of renewable energy in transport. Projects to promote charging stations for electric vehicles. Focuses on renewable energy.

6. Public Company:

- **Kosovo Post:** Providing logistics and transport services. Modernization of the fleet with electric vehicles for distribution. Main logistics operator in the country.

4.4 Montenegro

Montenegro: ESG Stakeholder Mapping in the Transport and Logistics Sector

Environmental, Social, and Governance (ESG) considerations are becoming increasingly important in Montenegro's transport and logistics sector. Although the country is in the early stages of ESG integration, both public and private actors are beginning to align with international sustainability goals. This report identifies the key stakeholders, categorizes them by their role and level of ESG adoption, and outlines current initiatives that reflect Montenegro's gradual shift toward sustainable practices.

1. Government and Regulatory Stakeholders

The Montenegrin government plays a central role in shaping ESG-related policies, particularly through the Ministry of Ecology, Spatial Planning and Urbanism. In partnership with the United Nations Development Programme (UNDP), the ministry has been involved in initiatives focused on low-carbon development and sustainable mobility,



including the expansion of electric vehicle infrastructure and promotion of non-motorized transport (UNDP Montenegro, 2023). The Ministry of Capital Investments is responsible for transport policy and infrastructure. It has supported efforts to modernize public transport systems and encourage the adoption of electric vehicles, though a formal national ESG strategy for transport has not yet been implemented (Government of Montenegro, 2022). The Environmental Protection Agency (EPA) oversees compliance with national environmental laws and monitors the environmental impact of transport and logistics. Meanwhile, the Montenegrin Eco Fund offers subsidies and incentives for green mobility solutions, such as grants for purchasing electric and hybrid vehicles (Eco Fund Montenegro, 2022).

2. Private Sector Stakeholders

Private companies in Montenegro are at varying stages of ESG integration. Milšped Montenegro, a logistics and freight company, has expressed interest in aligning its operations with sustainability goals but has not yet published detailed ESG reports. Nelt Group, active in logistics and distribution, has incorporated ESG principles into its regional strategy, including energy-efficient warehousing and employee wellbeing initiatives (Nelt Group, 2022). Montecargo, the state-owned rail freight operator, is undergoing fleet modernization efforts. Although the company is not explicitly focused on ESG frameworks, its modernization aligns indirectly with national sustainability goals (Ministry of Capital Investments, 2023). Overall, while the private sector demonstrates growing awareness of ESG, formal adoption of global standards such as the Global Reporting Initiative (GRI) or Science-Based Targets initiative (SBTi) remains limited.

3. Industry Associations and Umbrella Organizations

The Chamber of Economy of Montenegro plays a key advocacy role for businesses across all sectors. It has hosted forums and dialogues on sustainability, encouraging companies to align with European Union ESG benchmarks. However, the specific involvement of sector-focused associations, such as those representing logistics or transport operators, is not well-documented and appears to be limited to participation in broader business initiatives (Chamber of Economy of Montenegro, 2023).

4. Educational and Training Institutions

Education and vocational training in ESG are mainly delivered through regional collaborations and national training centers. The Centre for Vocational Education (CVE) has begun integrating sustainability topics into vocational training programs, particularly those connected to transport and logistics. Additionally, the University of Montenegro's Faculty of Mechanical Engineering includes content on sustainable mobility and environmental impact within its engineering curricula, though ESG remains a peripheral topic in higher education.

5. ESG Initiatives and Alignment with Standards

A notable regional event is the **ESG Adria Summit**, held annually in Porto Montenegro. This summit convenes business leaders, policymakers, and civil society actors to discuss ESG trends and challenges in Southeast Europe, including those related to transport and logistics (ESG Adria, 2023). On the national level, Montenegro's adoption of ESG standards is largely driven by its aspirations to join the European Union. As such, the country is aligning its policies with the European Green Deal and the UN Sustainable Development Goals (SDGs). However, implementation at the enterprise level is still emerging. Companies rarely publish ESG reports or commit to recognized standards like



GRI or SBTi, although awareness is increasing due to regional cooperation and donor-funded programs

Montenegro's ESG landscape in the transport and logistics sector is in a formative stage. The public sector is showing increasing commitment to green transport and environmental regulation, while the private sector is beginning to explore ESG integration. Educational institutions are participating through regional projects and slowly incorporating relevant content into training programs. The country's progress is largely shaped by its EU accession goals, which act as a catalyst for the gradual adoption of ESG standards across sectors. Moving forward, Montenegro's ESG success will depend on continued intersectoral cooperation, increased private sector engagement, and the development of structured ESG reporting and compliance frameworks.

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4.5 Slovenia

This section identifies and maps the key stakeholders involved in Environmental, Social, and Governance (ESG) practices within Slovenia's transport and logistics sector. Stakeholder mapping is crucial for understanding the complex network of influences and responsibilities that drive ESG adoption, enabling targeted strategies and collaborative efforts. Identifying the stakeholders in Slovenia's transport and logistics sector involves categorizing them based on their influence, engagement, and impact on ESG implementation. Key stakeholders include governmental and regulatory bodies, private sector companies, industry associations, educational and research institutions, non-governmental organizations (NGOs), and international entities (Freeman, 1984).

7. Governmental and Regulatory Bodies

Governmental and regulatory bodies play a critical role in setting the framework for ESG standards through policies, regulations, and enforcement mechanisms. Key stakeholders in Slovenia include:

- **Ministry of Infrastructure:** Responsible for developing and implementing transport policies, infrastructure development, and promoting sustainable mobility (Ministry of Infrastructure, 2025).
- **Ministry of the Environment and Spatial Planning:** Oversees environmental regulations, waste management, and pollution control, ensuring compliance with EU environmental directives (Ministry of the Environment and Spatial Planning, 2025).
- **Energy Agency:** Sets policies for energy efficiency and renewable energy sources, impacting the adoption of alternative fuels and green technologies in transport (Energy Agency, n.d.).

2. Private Sector Companies

Private sector companies are directly involved in implementing ESG practices within their operations. Key stakeholders include:

- **Logistics Service Providers:** Companies such as Port Koper and Intereuropa are pivotal in adopting green logistics practices, sustainable supply chain management, and innovative transport solutions (Port Koper, 2025; Intereuropa, 2017).
- **Transport Companies:** Both passenger and freight transport companies influence ESG adoption through fleet modernization, route optimization, and investment in alternative fuels (Slovenian Railways, 2025).
- **Retail and Manufacturing Companies:** Companies with extensive supply chains are increasingly focused on sustainable procurement and logistics practices to reduce their environmental footprint (Gorenje, 2014).



3. Industry Associations

Industry associations facilitate knowledge sharing, promote best practices, and advocate for their members' interests in the transport and logistics sector. Key stakeholders include:

- **Chamber of Commerce and Industry of Slovenia (CCIS):** Promotes sustainable business practices and provides resources for companies to integrate ESG principles (CCIS, 2025).
- **Association of Logistics Providers:** Represents the interests of logistics companies and promotes efficiency, innovation, and sustainability in the sector (Association of Logistics Providers, 2025).

4. Educational and Research Institutions

Educational and research institutions play a crucial role in generating knowledge, developing talent, and promoting innovation in sustainable transport and logistics. Key stakeholders include:

- **NOA** higher education institutions located in Ljubljana: Executes bachelor and masters program degrees in the fields of transport, logistics and sustainability. Moreover NOA also conducts research in the fields in which it executes the educational programs (NOA, 2025)
- **University of Ljubljana:** Conducts research on sustainable transport, logistics, and supply chain management, and offers educational programs to develop ESG competencies (University of Ljubljana, 2025).
- **Jožef Stefan Institute:** Engages in research related to energy efficiency, renewable energy, and environmental technologies, contributing to sustainable solutions in the transport sector (Jožef Stefan Institute, n.d.).

5. Non-Governmental Organizations (NGOs)

NGOs advocate for environmental protection, social responsibility, and sustainable development, influencing public opinion and promoting policy changes. Key stakeholders include:

- **Ecologists Without Borders:** Promotes sustainable practices and raises awareness about environmental issues related to transport and logistics (Ecologists Without Borders, 2022).
- **Focus Association for Sustainable Development:** Advocates for sustainable development policies and promotes responsible business practices (Focus Association for Sustainable Development, n.d.).

6. International Entities

International entities provide financial support, technical expertise, and promote international standards for sustainable development in the transport and logistics sector. Key stakeholders include:



- **European Union (EU):** Provides funding for sustainable transport projects through programs such as the Connecting Europe Facility (CEF) and sets regulatory standards for environmental protection (European Commission, n.d.).
- **European Bank for Reconstruction and Development (EBRD):** Invests in sustainable infrastructure projects and promotes green logistics initiatives in Slovenia (EBRD, n.d.).
- **World Bank:** Offers financial and technical assistance for transport infrastructure development and promotes sustainable transport policies (World Bank, 2025).

7. Stakeholder Influence and Engagement

The influence and engagement of these stakeholders can be mapped to understand their relative importance and impact on ESG adoption in Slovenia's transport and logistics sector. A matrix can be used to visualize this, plotting stakeholders based on their level of influence and their level of engagement (Ackermann, 2012).

Stakeholder Category	Examples	Level of Influence	Level of Engagement
Governmental/Regulatory Bodies	Ministry of Infrastructure, Ministry of Environment and Spatial Planning, Energy Agency	High	High
Private Sector Companies	Port Koper, Intereuropa, Slovenian Railways, Gorenje	Medium	Medium
Industry Associations	Chamber of Commerce and Industry of Slovenia (CCIS), Association of Logistics Providers	Medium	Medium
Educational/Research Institutions	NOA, University of Ljubljana, Jožef Stefan Institute	Medium	Low
NGOs	Ecologists Without Borders, Association for Sustainable Development	Low	Medium



International Entities	European Union (EU), European Bank for Reconstruction and Development (EBRD), World Bank	High	Medium
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Table 1: Stakeholder Influence and Engagement in Slovenia's Transport and Logistics Sector

8. Collaborative Opportunities

Identifying key stakeholders and understanding their influence and engagement levels enables targeted collaborative efforts to promote ESG adoption. Governmental bodies can work with industry associations and private companies to develop effective policies and incentives. Educational institutions can partner with industry to develop training programs that enhance ESG competencies. NGOs can play a crucial role in raising awareness and monitoring compliance. The successful integration of ESG practices in Slovenia's transport and logistics sector depends on the active participation and collaboration of all stakeholders. By recognizing their respective roles and fostering effective partnerships, Slovenia can advance its sustainability goals and achieve a more resilient and responsible transport and logistics sector.



5. Survey Distribution and Data Collection

5.1 Bosnia and Herzegovina

This analysis presents the results of the questionnaire "**Application of ESG in Transport and Logistics**", conducted among professionals in Bosnia and Herzegovina's transport and logistics sector. The survey aimed to assess awareness, implementation, challenges, and future perspectives related to ESG principles in the industry.

The questionnaire was structured into six sections: general ESG awareness, current ESG practices, challenges and barriers, training and development, future outlook, and demographic insights. Respondents shared their familiarity with ESG principles, the extent of ESG integration within their organizations, key drivers and obstacles, and the resources required for further adoption.

By analyzing these findings, we aim to gain insights into the application of ESG in transport and logistics and identify the educational needs for developing specialized training courses. The results will contribute to designing curriculum content, including course materials, assignments, and adaptive learning technologies, to support industry professionals in effectively adopting ESG principles.

Data summary overview of questionnaires for Bosnia and Herzegovina

This survey includes responses from a diverse group of participants, such as industry professionals, higher education institutions lecturers and others, as well as various associations, as shown in the distribution in **Figure 5.1**.

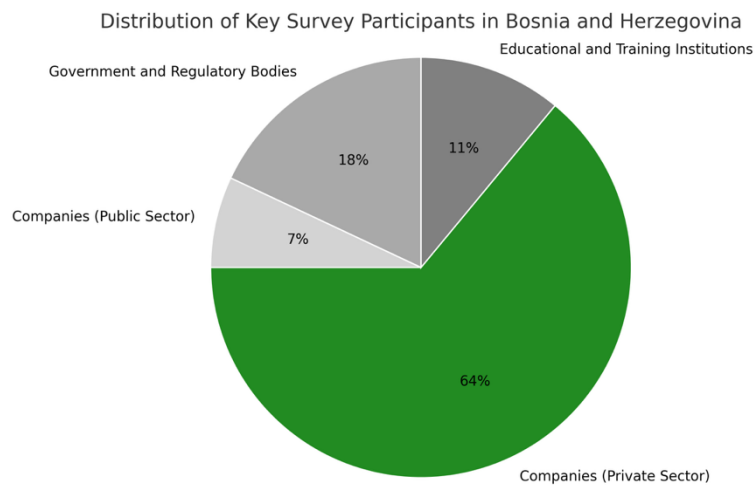


Figure 5.1. Distribution of key survey participants in Bosnia and Herzegovina

A key finding [1] is the **lack of familiarity with ESG principles**, with 82.1% of respondents stating they are not well-informed (**Figure 5.2**). While 60.7% recognize ESG as somewhat relevant to the sector (**Figure 5.3**), only 39.3% are aware of applicable national or international ESG standards (**Figure 5.4**). Additionally, 67.9% are unaware that they could be indirectly involved in ESG reporting through supply chain obligations (**Figure 5.5**). These statistics emphasize the need for education and awareness-building initiatives within the industry.

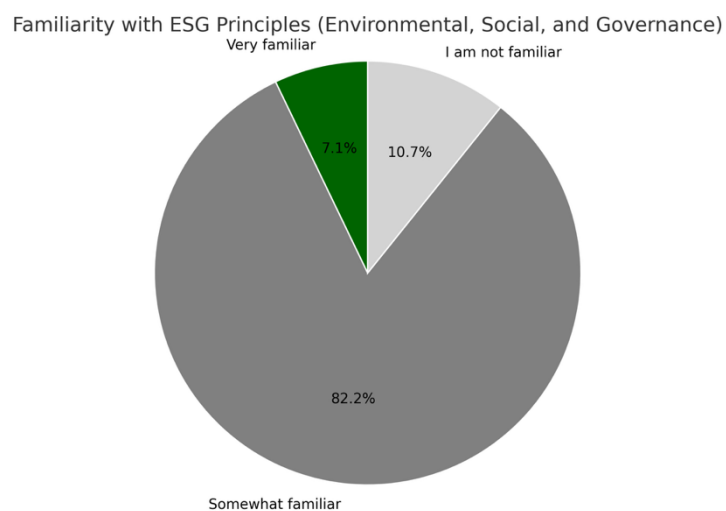


Figure 5.2. Familiarity with ESG principles in Bosnia and Herzegovina



Perceived Relevance of ESG Principles in Transport and Logistics Sector

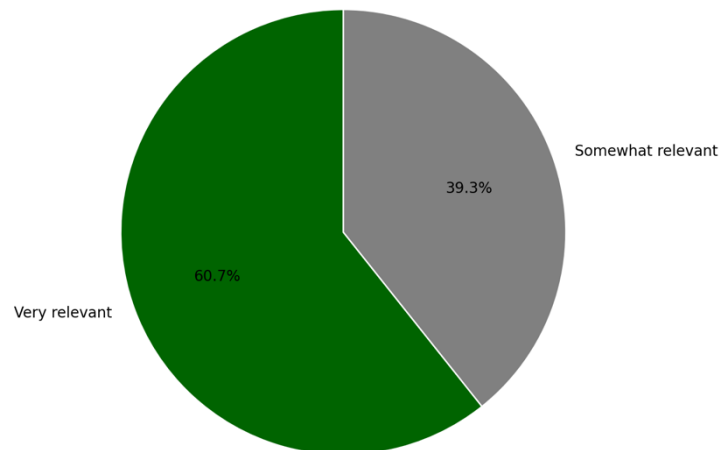


Figure 5.3. Recognition of ESG relevance in the sector in Bosnia and Herzegovina

Familiarity with National or International ESG Frameworks or Standards

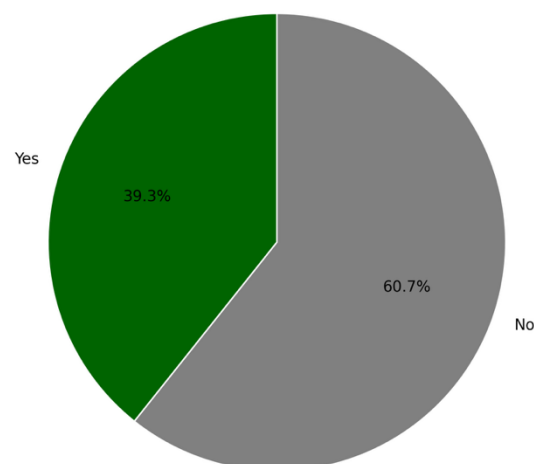


Figure 5.4. Awareness of applicable national or international ESG standards



Awareness of ESG Reporting Involvement in the Supply Chain

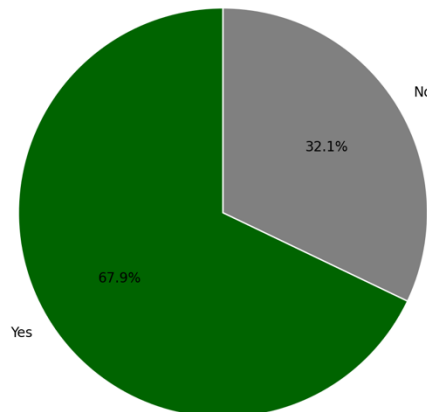


Figure 5.5. Awareness of indirect involvement in ESG reporting

Currently, **ESG reporting is not a widespread practice** in the sector, as 46.4% of respondents stated their organizations do not engage in ESG reporting, while 32.1% are uncertain (**Figure 5.6**). Among those implementing ESG measures, social aspects such as employee well-being are the primary focus (47.1%), followed by environmental concerns like emission reduction (35.3%). The governance aspect appears to be less emphasized, suggesting a need for a more comprehensive ESG approach (**Figure 5.7**).

Current Implementation of ESG Reporting Practices in Organizations

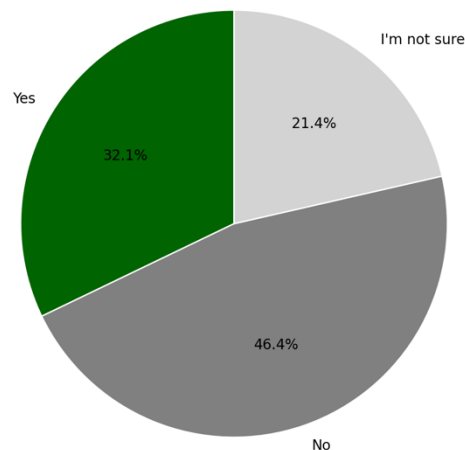


Figure 5.6. ESG reporting in the sector in Bosnia and Herzegovina

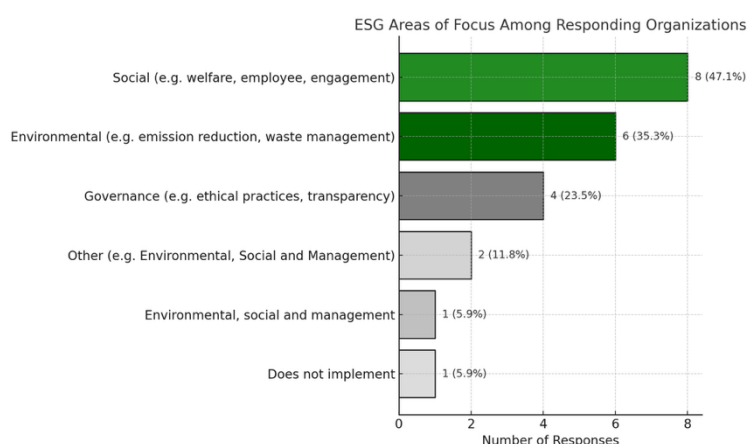


Figure 5.7. Focus of reporting in the sector in Bosnia and Herzegovina

The **key drivers for ESG adoption** include social responsibility (67.9%), customer demands (53.6%), and regulatory compliance (46.4%). This indicates that external factors play a crucial role in motivating companies to integrate ESG practices, rather than internal sustainability strategies (**Figure 5.8**). However, the **main challenges hindering ESG adoption** are the **lack of awareness (67.9%)**, **financial constraints (39.3%)**, and **limited training opportunities (28.6%)**. These barriers need to be addressed through targeted educational programs and financial support mechanisms (**Figure 5.9**).

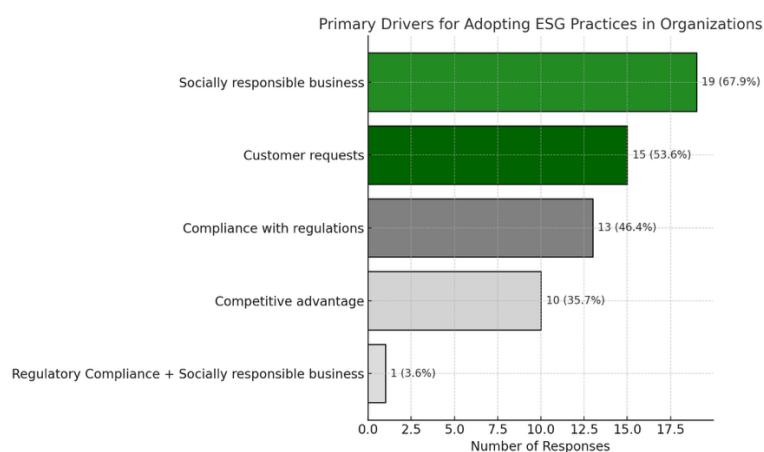


Figure 5.8. Key drivers for ESG adoption in the sector in Bosnia and Herzegovina

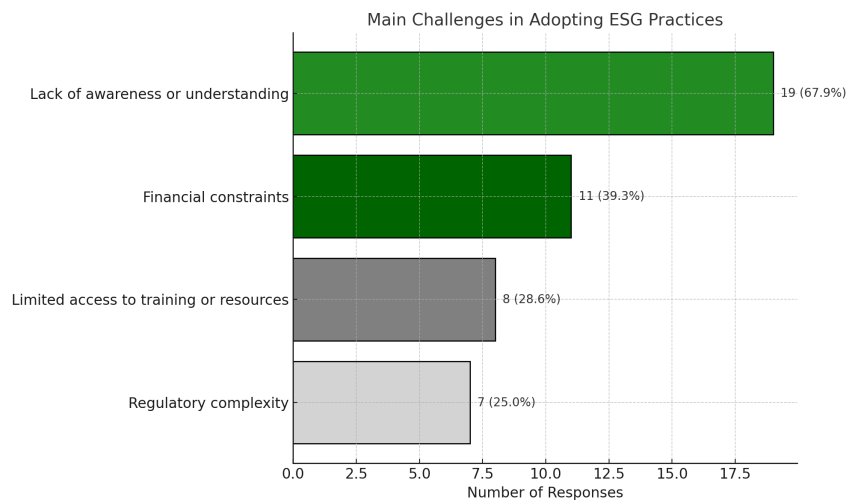


Figure 5.9. Main challenges hindering ESG adoption in the sector in Bosnia and Herzegovina

Regarding **ESG training and development**, only a small percentage of organizations currently **provide training on ESG topics (3.6%)**, as shown in **Figure 5.11**. The demand for such training is evident (**Figure 5.12**), as respondents expressed the need for education on **environmental sustainability (64.3%)**, **governance and ethical standards (46.4%)**, and **social responsibility initiatives (35.7%)**. Furthermore, **39.3% rated ESG training availability as poor (Figure 5.10)**, reinforcing the necessity of structured educational programs tailored to the sector's needs.

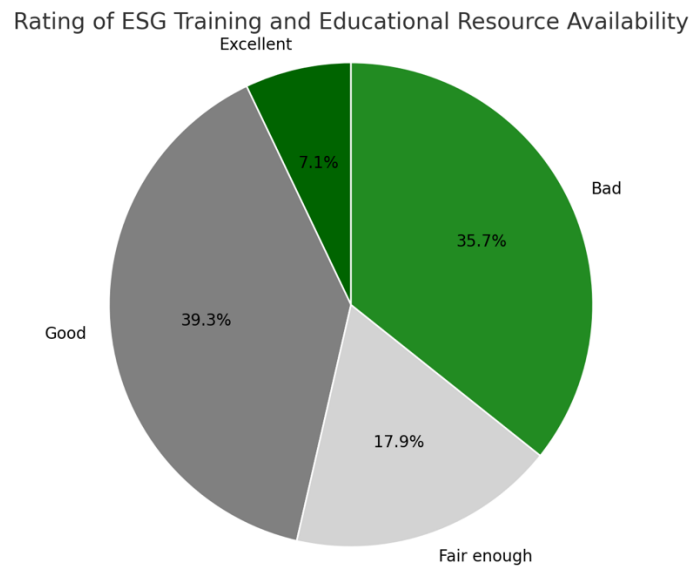


Figure 5.10. ESG training availability in the sector in Bosnia and Herzegovina



Provision of ESG-Related Training to Employees by Organizations

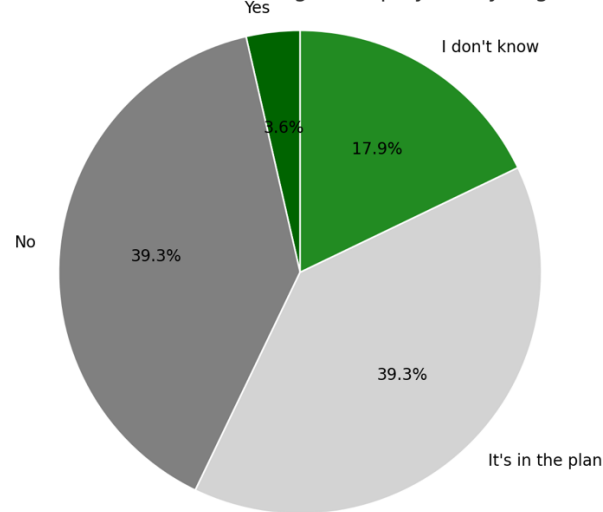


Figure 5.11. Organizations providing training on ESG topics in the sector in Bosnia and Herzegovina

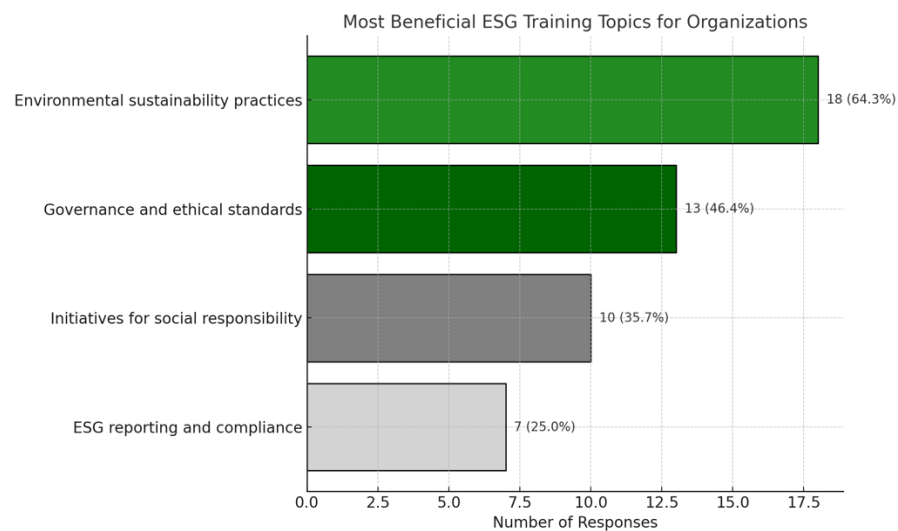


Figure 5.12. ESG training needs in the sector in Bosnia and Herzegovina

Looking ahead, **53.6% of respondents believe their organizations will increase their focus on ESG practices over the next three years (Figure 5.13)**. To facilitate this shift, companies require greater access to government incentives (67.9%), ESG training programs (50%), and regulatory guidelines (39.3%), as shown in **Figure 5.14**. These findings suggest that policymakers and industry leaders should collaborate to provide financial incentives, educational resources, and clear regulatory frameworks to support ESG integration.



Likelihood of Increasing ESG Focus in the Next 3 Years

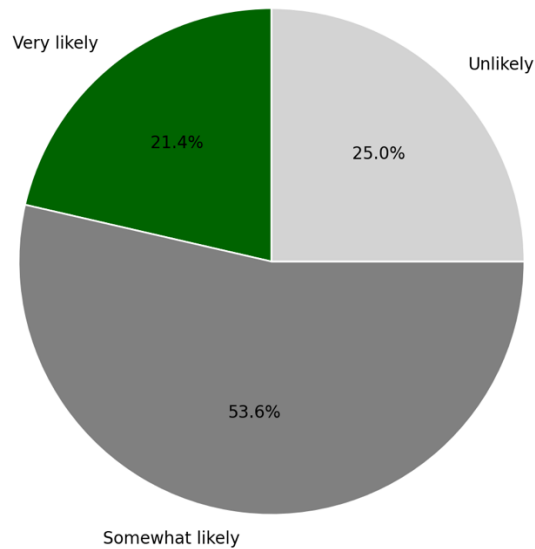


Figure 5.13. Likelihood of organization increasing focus on ESG practices in the next 3 years

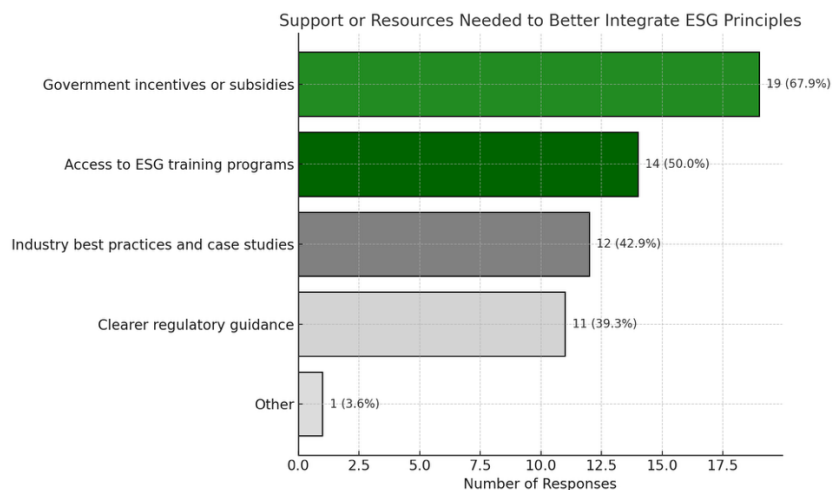


Figure 5.14. Support or resources that would help integrate ESG principles

The demographic insights show that a majority of respondents hold executive positions (64.3%) and represent medium (35.7%) and large (50%) companies, as shown in **Figure 5.15** and **Figure 5.16**. Since decision-makers are well-represented in the survey, **targeted engagement with executives could drive ESG adoption** at a strategic level.

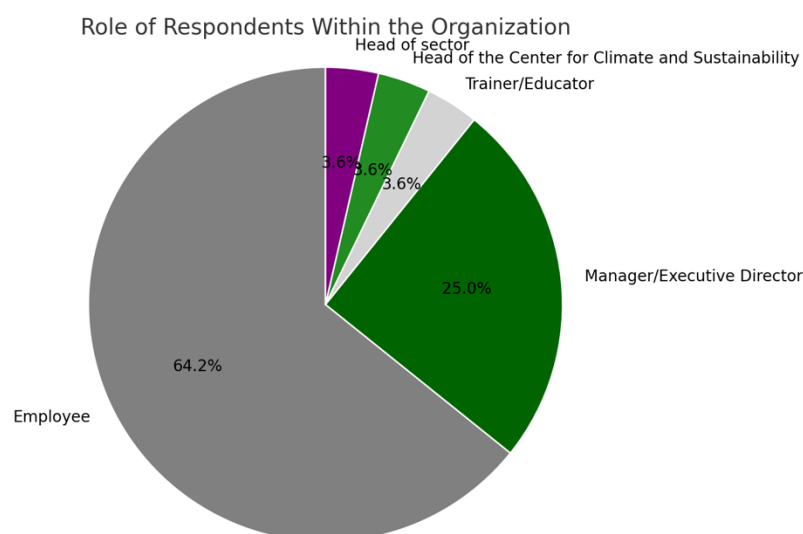


Figure 5.15. Organization representatives involved in the survey

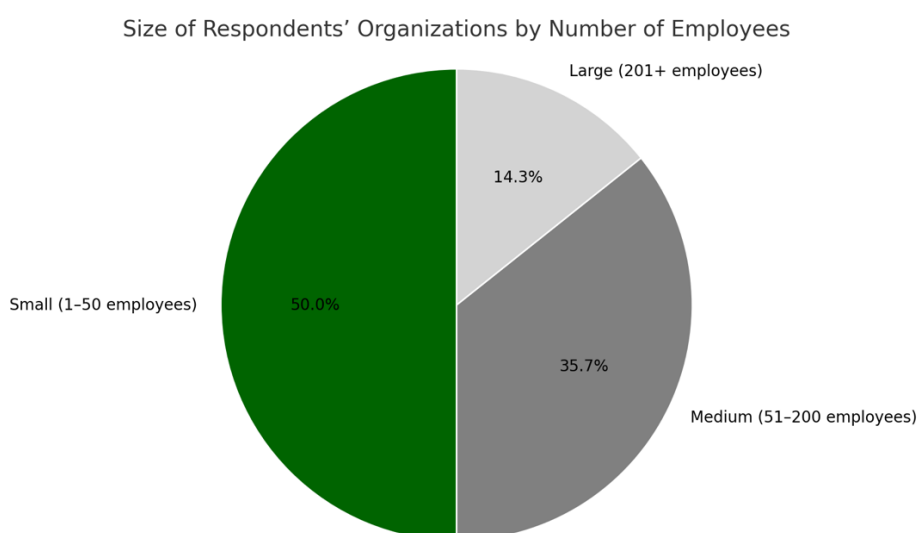


Figure 5.16. Scale of the organization involved in the survey

Conclusion & recommendations for Bosnia and Herzegovina

To accelerate ESG integration in Bosnia and Herzegovina's transport and logistics sector, several actions should be prioritized. First, raising awareness of ESG principles and reporting obligations is crucial. Second, developing tailored ESG training programs for industry professionals is necessary to address knowledge gaps. Third, organizations need support in implementing ESG reporting practices while balancing environmental, social, and governance factors. Fourth, addressing financial and educational barriers through incentives and funding programs is key. Lastly, stronger collaboration between the government and industry stakeholders is needed to ensure regulatory clarity and resource availability for ESG adoption. The survey results reveal significant gaps in ESG awareness and training within the sector. A large portion of respondents are unfamiliar



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with ESG principles and standards, highlighting the need for targeted education. There is a strong demand for training, particularly in environmental sustainability, governance, and social responsibility. To support this shift, stakeholders should improve access to training programs, regulatory guidelines, and financial incentives. These insights will contribute to the development of future education and training courses for ESG integration in the sector. [1] https://docs.google.com/forms/d/1LkEGG55-xsjvWWBr1gWhQ98S7_JPXvaUZ9J6ltZ4nrc/viewanalytics



5.2 Croatia

The ESG Survey on Transport and Logistics in Croatia (conducted in 2025) aimed to understand the current awareness, practices, and attitudes toward Environmental, Social, and Governance (ESG) principles within the sector. This analysis interprets the survey's percentage results, identifying key insights into ESG integration within Croatian organizations in transport and logistics. Major trends and challenges are highlighted with supporting graphs for clarity and are discussed in the context of current ESG trends.

Awareness and Familiarity with ESG Principles

The survey results reveal a significant gap in awareness regarding ESG principles among respondents. Only 12% reported being very familiar with ESG, 36% somewhat familiar, and a notable majority of 52% were not familiar at all. This indicates that while the concept of ESG is gradually entering industry discussions, in-depth knowledge and understanding are still limited within Croatian organizations.

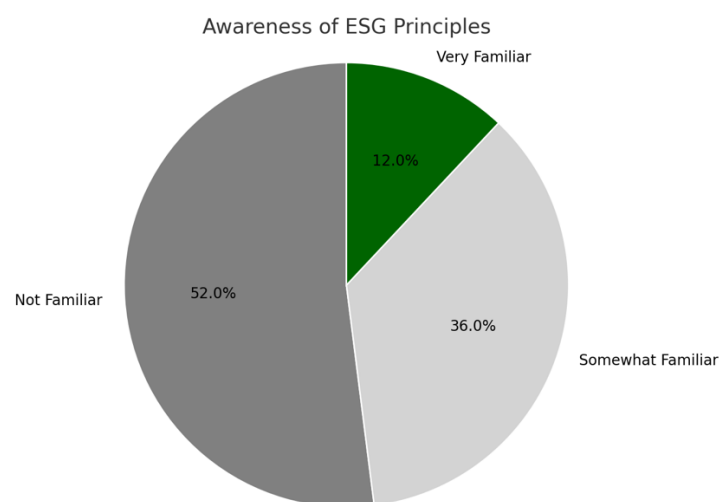


Figure 1: Familiarity with ESG Principles

Relevance of ESG in Transport and Logistics

Regarding the perceived relevance of ESG principles to the transport and logistics sector, only 12% consider ESG very relevant, whereas 32% find them somewhat relevant. A majority (56%) perceives ESG principles as not relevant to their sector. This reflects a significant disconnect, possibly due to limited direct experience or insufficient communication regarding ESG's applicability and benefits to logistics and transportation operations.

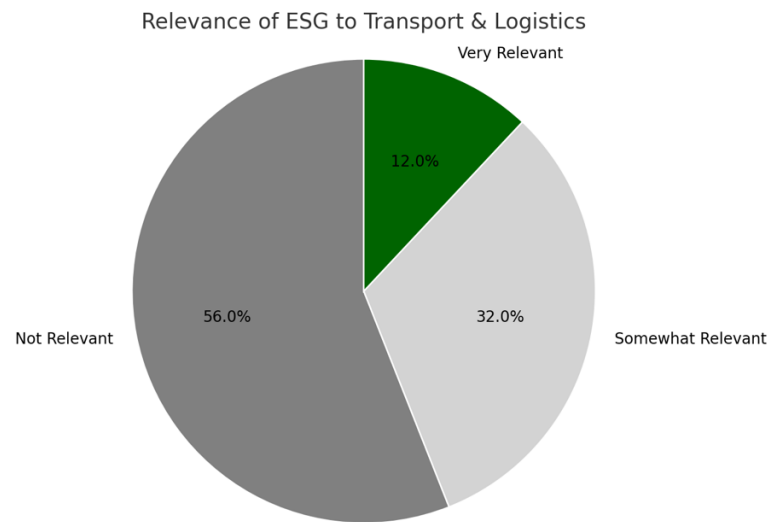


Figure 2: Relevance of ESG Principles in Transport and Logistics

Current ESG Practices and Reporting

Awareness of ESG frameworks applicable to the industry is relatively better, with 64% acknowledging familiarity with national or international ESG standards. However, despite this awareness, active ESG reporting practices are scarce: only 16% of respondents confirmed current ESG reporting activities, with 28% not reporting and 56% uncertain about their organization's ESG activities. This uncertainty indicates a lack of clear organizational strategies and communication regarding ESG implementation.

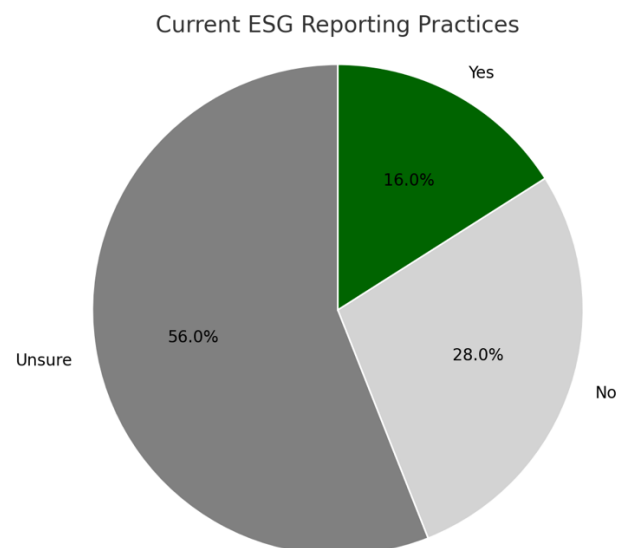


Figure 3: Current ESG Reporting Practices

Motivations for ESG Integration

Organizations primarily adopt ESG practices due to strategic and compliance-oriented motivations. A competitive advantage (47.4%) was the leading driver, followed by



regulatory compliance (36.8%) and customer demand (15.8%). This underscores a pragmatic rather than purely ethical motivation, highlighting ESG integration as a strategic business decision rather than an ethical or voluntary one.

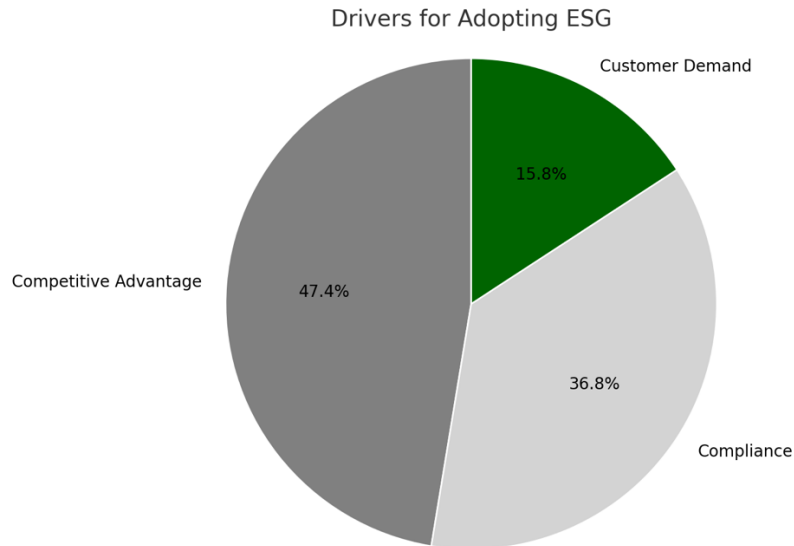


Figure 4: Drivers for Adopting ESG Practices

Challenges to ESG Adoption

Significant barriers hinder broader ESG implementation, primarily limited access to training resources (33.3%) and regulatory complexities (28.6%). Additionally, financial constraints (19.1%) and lack of understanding or awareness (19.1%) compound these challenges. These issues collectively suggest that targeted educational programs, clearer guidelines, and financial incentives might significantly enhance ESG integration.

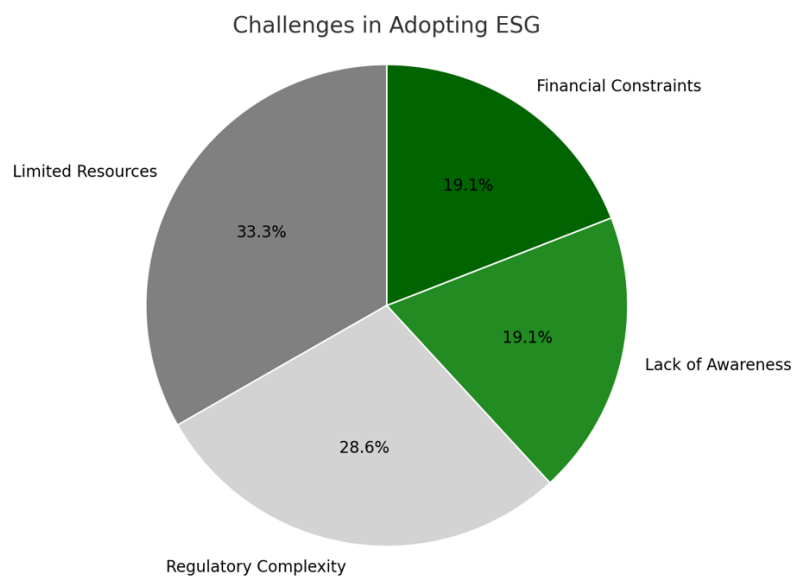


Figure 5: Main Challenges in ESG Adoption



ESG Training and Development Needs

Responses regarding ESG training indicated mixed availability: 36% rated the resources as good, another 36% as fair, and 24% as poor. Internal organizational ESG training is limited, with only 20% confirming provided training, while most respondents (52%) were unsure. There was an expressed preference for training in governance and ethics (28%), alongside environmental sustainability, social responsibility, and reporting practices (each 20%), highlighting a clear need for comprehensive ESG training programs.

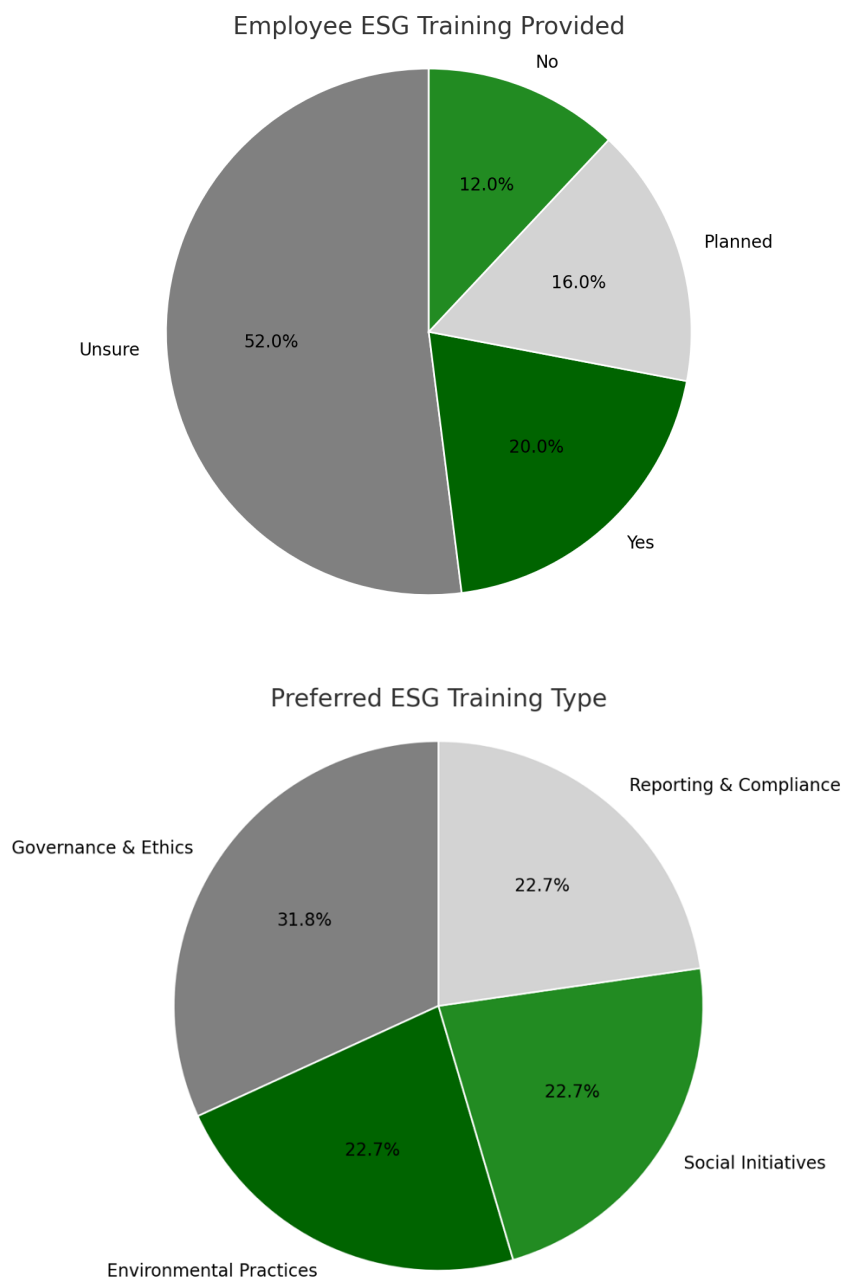


Figure 6: ESG Training Preferences



Future ESG Outlook

Looking ahead, organizations showed moderate optimism toward increasing ESG practices. Around 40% indicated they are very likely to focus more on ESG in the next three years, with another 36% somewhat likely. Respondents strongly emphasized the need for clearer regulatory guidelines (44%), government incentives (24%), and access to specialized ESG training programs (20%) to facilitate deeper integration of ESG practices.

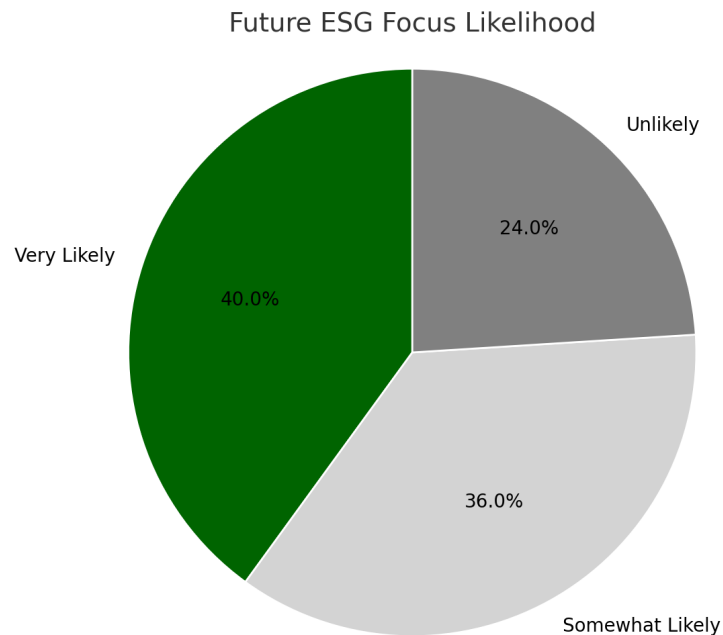


Figure 7: Likelihood of Increasing ESG Practices in the Next Three Years

Conclusion

Croatian transport and logistics organizations exhibit basic awareness but limited practical integration of ESG principles. Key challenges include insufficient knowledge, training, and regulatory complexity. There is, however, a clear recognition of the strategic benefits of ESG and openness to future integration, provided adequate resources and support structures are established. This highlights an opportunity for focused initiatives to bridge existing gaps, thereby enhancing sustainability and competitiveness within the sector.



5.3 Kosovo

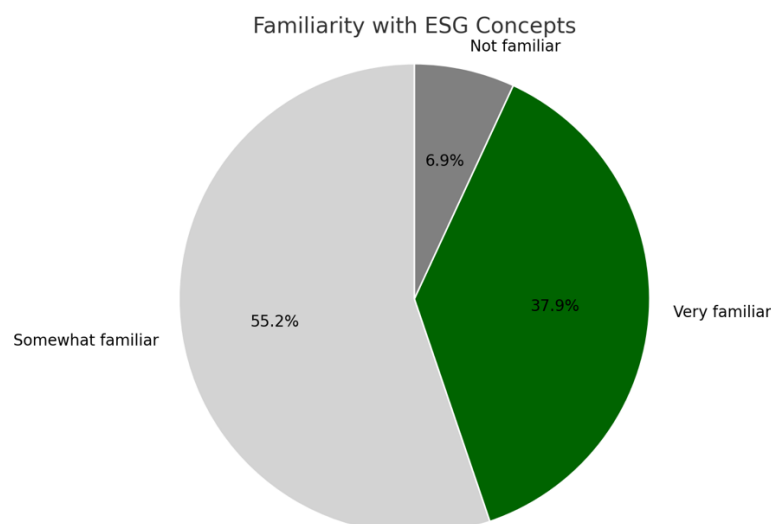
This report presents the findings from a survey conducted to assess the level of awareness, adoption, and training needs related to Environmental, Social, and Governance (ESG) principles among professionals in the transport and logistics sector in Kosovo. The aim was to collect quantitative insights that would inform future ESG initiatives and capacity-building efforts within the industry.

The survey was developed using a template provided by the project lead and included 16 questions covering general awareness of ESG, current practices, training availability, perceived challenges, and future perspectives. The questionnaire was distributed online to a targeted group of 29 respondents from the transport and logistics sector, including industry professionals, vocational education and training (VET) trainers, and members of trade associations. Participants were based primarily in Kosovo, with a few responses from neighboring countries in the Western Balkans region.

Among the 29 respondents, the majority (62.1%) identified as employees, followed by trainers or educators (27.6%) and managers/executives (10.3%). Most respondents (86.2%) came from medium-sized organizations (51–200 employees), while 13.8% represented small enterprises (1–50 employees). The geographical spread was predominantly Kosovo (89.7%), with limited participation from Bosnia and Herzegovina, Croatia, Montenegro, and Slovenia.

ESG Awareness Level

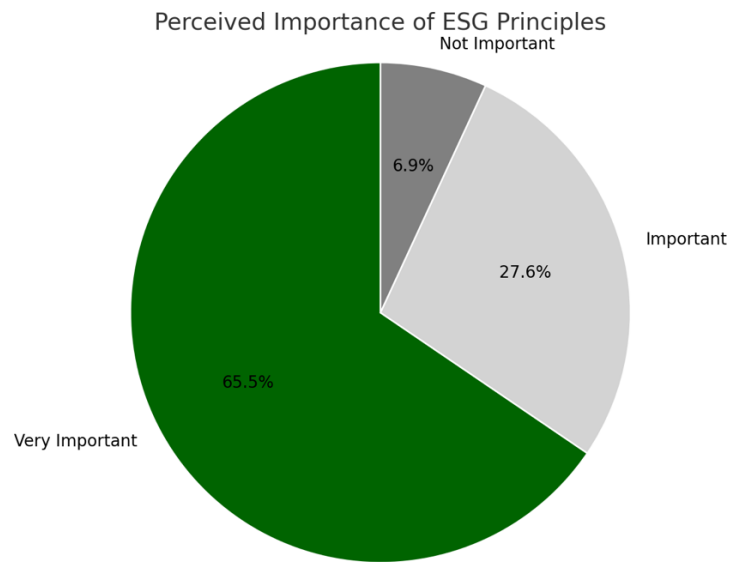
Respondents were asked about their familiarity with ESG principles. A majority (55.2%) reported an average understanding, while 37.9% considered themselves highly familiar. A small minority (6.9%) indicated they had no knowledge of ESG





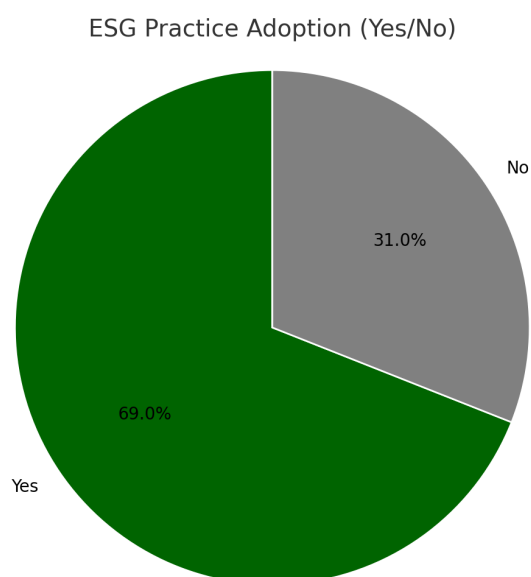
Importance of ESG in Transport and Logistics

Respondents were asked how important ESG principles are for their sector. A strong majority (65.5%) rated ESG as very important, while 27.6% considered it important. Only 6.9% believed ESG was not important for the sector.



National or international ESG frameworks or standards applicable to your sector

69% of respondents are aware of applicable ESG frameworks, while 31% are not, pointing to moderate knowledge of formal ESG guidelines.

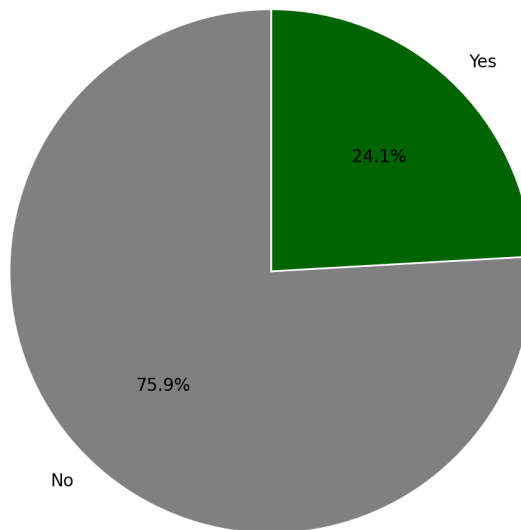




Subject to ESG reporting requirements, to be included in the reporting process as part of the supply chain?

Only 24.1% are aware of their ESG reporting role via the supply chain, suggesting a gap in understanding ESG's indirect obligations.

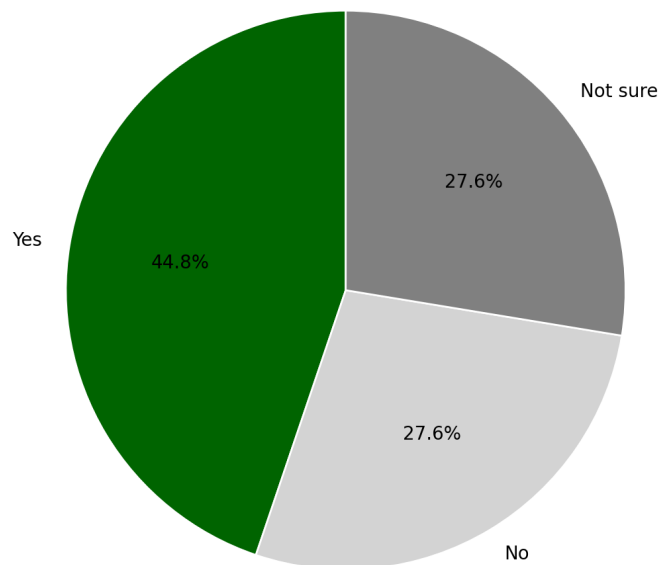
ESG Engagement Status (Yes/No)



Current ESG Practice Implementation

To assess implementation, respondents were asked whether their organizations currently apply ESG practices. 44.8% confirmed that they do, whereas 27.6% said they do not, and another 27.6% were unsure.

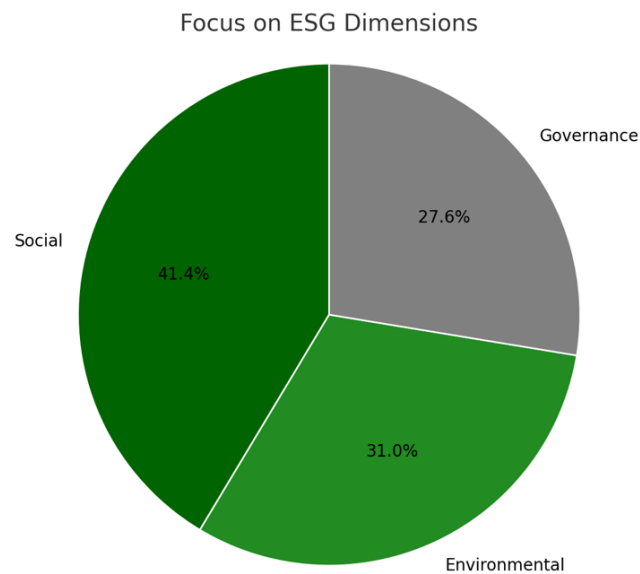
ESG Awareness / Readiness (Yes / No / Not sure)





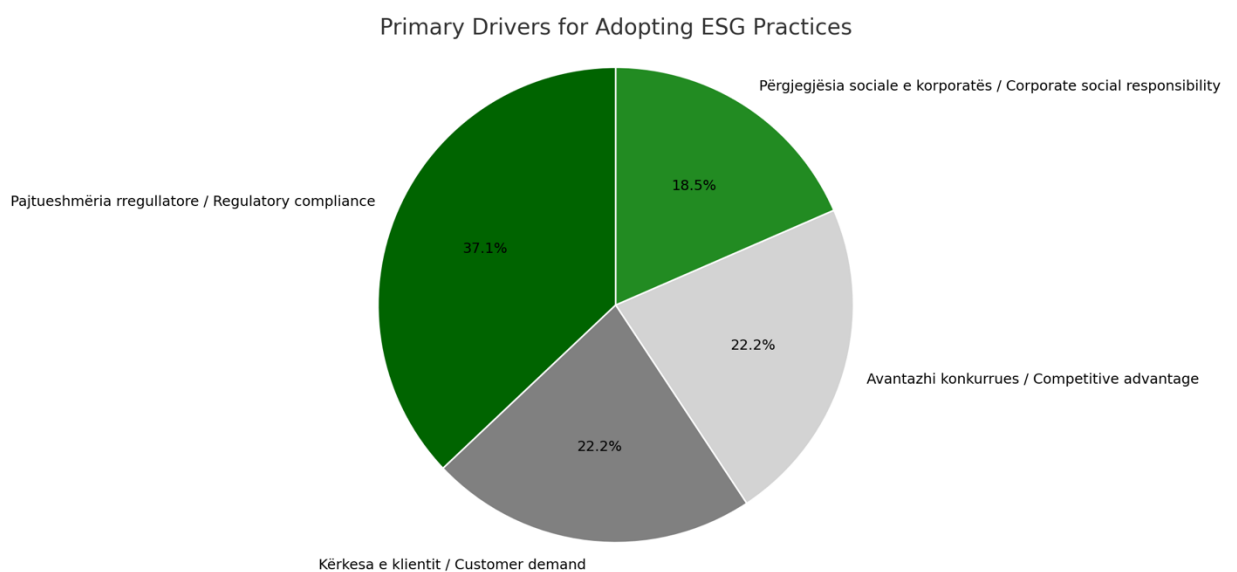
ESG Focus Areas

Among those practicing ESG, 41.4% said their focus was on social initiatives such as employee welfare and community engagement. Environmental concerns were prioritized by 31%, while governance practices such as transparency and ethical standards were cited by 27.6%.



Drivers of ESG Adoption

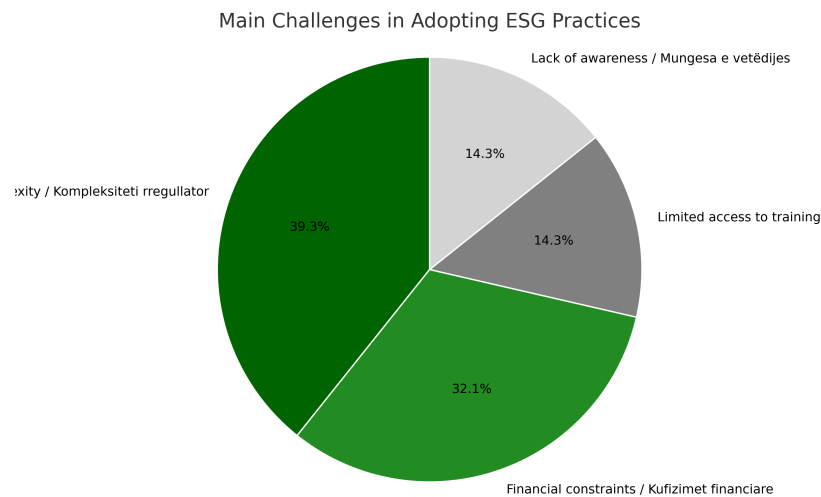
The main motivations for adopting ESG were identified as corporate social responsibility (34.5%), client demand (20.7%), competitive advantage (20.7%), and regulatory compliance (17.2%).





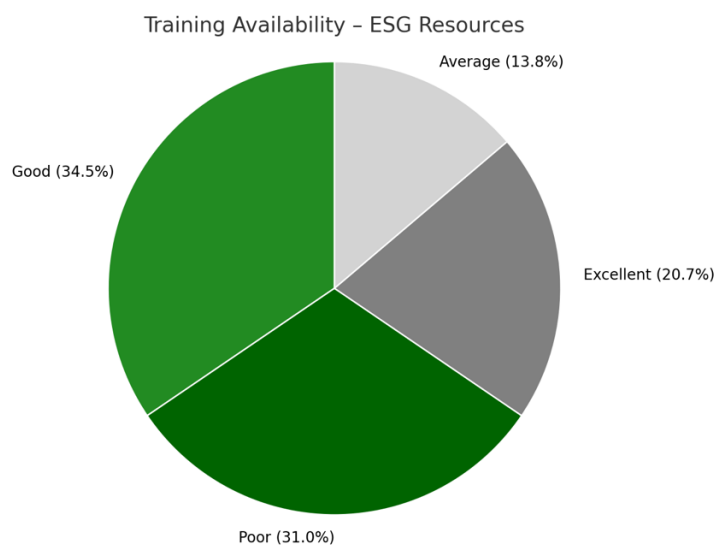
Barriers to ESG Adoption

Respondents identified regulatory complexity (39.3%) as the primary barrier, followed by financial constraints (32.1%), limited access to training or resources (14.3%), and lack of awareness (14.3%).



Training Availability

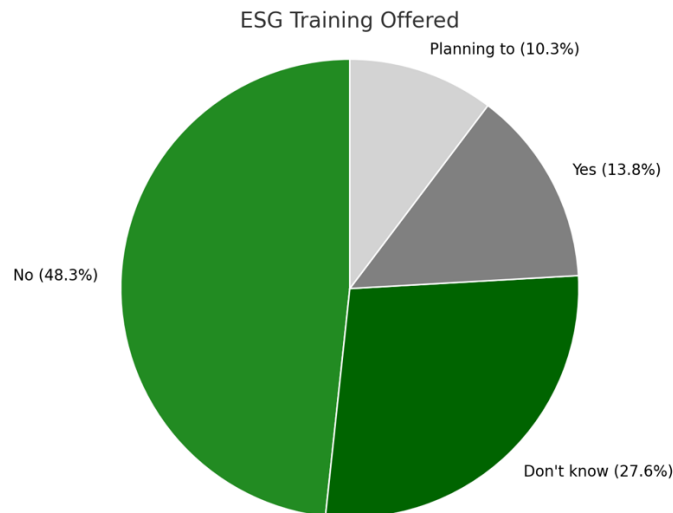
When evaluating training resources, 34.5% rated them as good, 31% as low, 20.7% as excellent, and 13.8% as average.





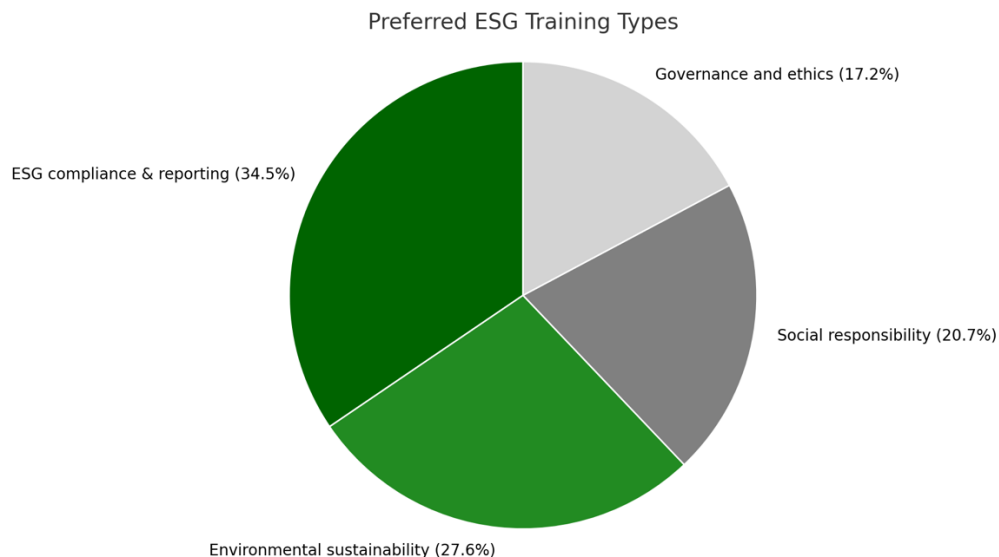
ESG Training Offered

Only 13.8% of respondents stated their organization had provided ESG training. Nearly half (48.3%) said they had not received any training, and 27.6% were unsure. 10.3% reported that ESG training was planned.



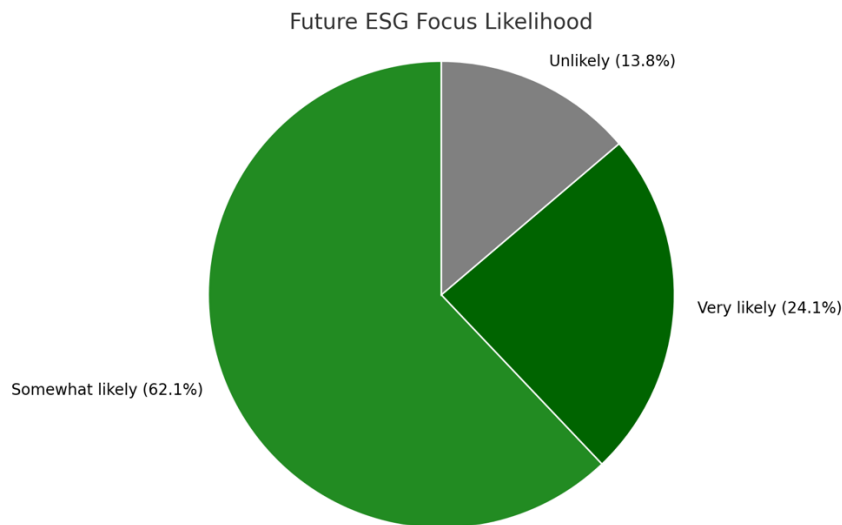
Preferred ESG Training Types

When asked what type of training would be most beneficial, 34.5% selected ESG compliance and reporting. Environmental sustainability (27.6%), social responsibility (20.7%), and governance and ethics (17.2%) followed.



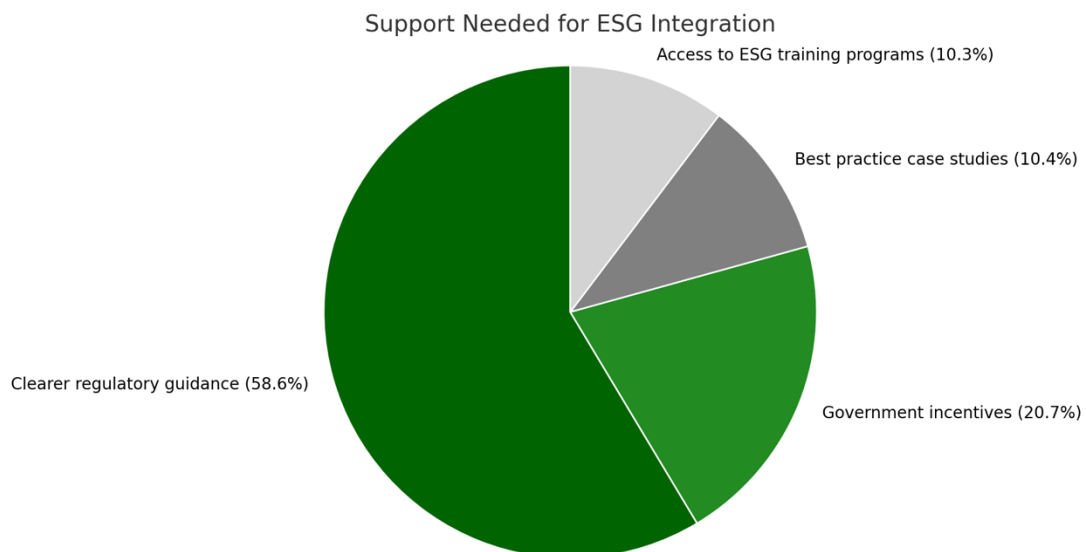
Future ESG Focus

Looking ahead, 62.1% of respondents believed their organizations would likely increase their ESG focus in the next three years. 24.1% considered it somewhat likely, while 13.8% found it unlikely.



Support Needed for ESG Integration

The most requested form of support for ESG integration was clearer regulatory guidance (58.6%). Government incentives (20.7%), access to training programs (10.3%), and sharing of best practices (10.3%) were also mentioned.



Conclusions for Kosovo

The survey results indicate a growing awareness and appreciation of ESG principles within the transport and logistics sector, particularly among professionals in Kosovo. While many organizations recognize the importance of ESG and have begun implementing relevant practices, several barriers remain, including regulatory complexity and insufficient training resources. The findings suggest a need for targeted educational initiatives, clearer regulatory frameworks, and broader stakeholder engagement to support the sector's transition toward more sustainable and responsible practices.



5.4 Montenegro

This analysis presents the results of the questionnaire "Application of ESG in Transport and Logistics", conducted among professionals in Montenegro's transport and logistics sector. The survey aimed to assess awareness, implementation, challenges, and future perspectives related to ESG principles in the industry.

The questionnaire was structured into six sections: general ESG awareness, current ESG practices, challenges and barriers, training and development, future outlook, and demographic insights. Respondents shared their level of familiarity with ESG principles, the extent to which ESG is integrated in their organizations, drivers and constraints affecting adoption, and their needs for further training and capacity building.

By analyzing these findings, we aim to understand how ESG is currently being applied in Montenegro's transport and logistics sector and to identify the necessary educational and institutional support for broader implementation. The results will inform the development of tailored training programs and course materials designed to equip professionals in the sector with the knowledge and tools to implement ESG standards effectively.

Data summary overview of questionnaires for Montenegro

The survey gathered responses from a variety of stakeholders, including representatives from private logistics firms, public sector bodies, academia, and industry associations.

Familiarity with ESG Principles

A key finding is that ESG remains a relatively new concept for many stakeholders: 66.7% of respondents reported limited or no familiarity with ESG principles (Figure 5.4.1).

Relevance of ESG to the Sector

Despite the lack of familiarity, 57.1 % of the participants believe ESG is at least somewhat relevant to Montenegro's transport and logistics sector, indicating a growing recognition of its importance (Figure 5.4.2).

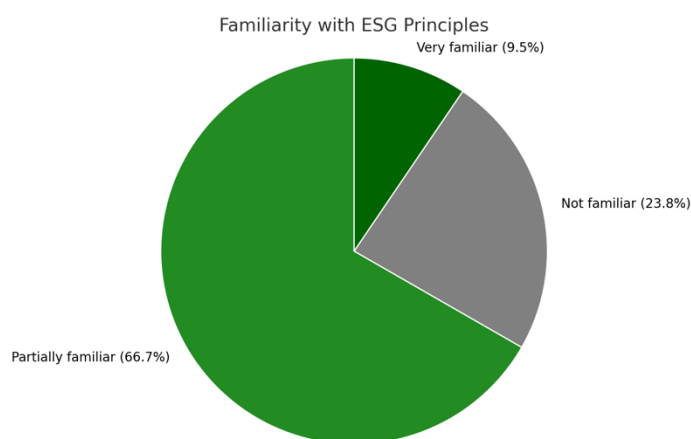


Figure 5.4.1



Relevance of ESG Principles to Transport & Logistics Sector

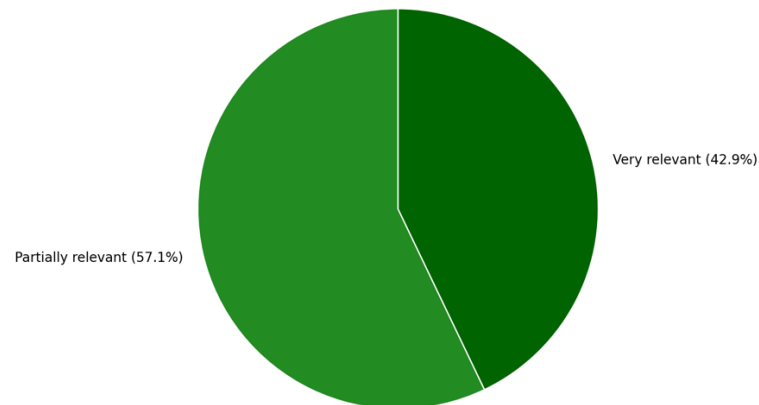


Figure 5.4.2

Awareness of ESG Frameworks or Standards

Only 28.6% of participants are aware of any national or international ESG standards applicable to the sector (Figure 5.4.3).

Supply Chain ESG Involvement

61.9 % of respondents were unaware that they might be indirectly involved in ESG reporting obligations through their position in international supply chains (Figure 5.4.4). This highlights a major knowledge gap and underlines the need for awareness-raising campaigns.

Familiarity with ESG Frameworks or Standards

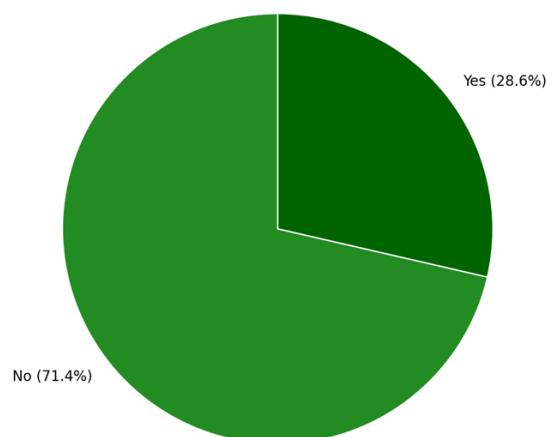


Figure 5.4.3



Awareness of ESG Reporting Role in Supply Chains

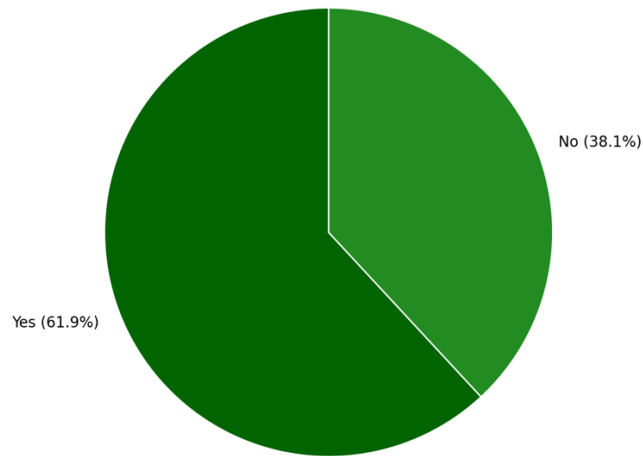


Figure 5.4.4

Current ESG Practices

Regarding implementation, only 28.6 % of organizations represented in the survey have taken any concrete steps toward ESG adoption, while most participants are not even sure if any implementation has taken place or not (Figure 5.5.5).

ESG Focus Areas

Current ESG focus is mostly in the area of Society (e.g., employee well-being, community engagement) with 27.8%.

Does Your Organization Implement ESG Practices?

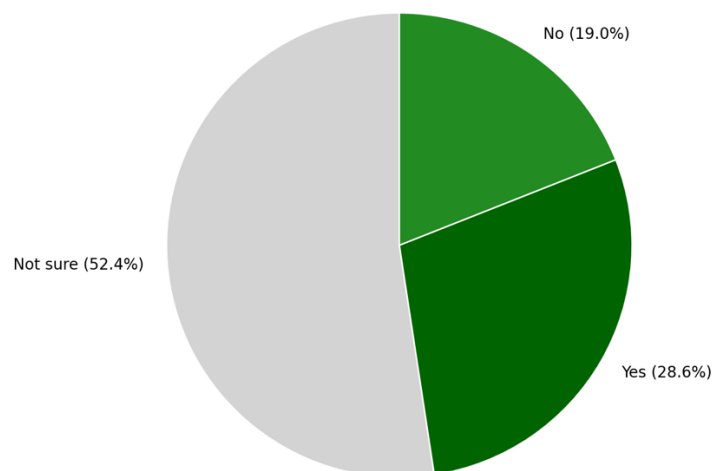


Figure 5.4.5

Drivers for Adopting ESG

CSR is the leading motivator, with compliance also notable. A substantial portion is unclear on the rationale (Figure 5.4.6)



Main Reasons for Adopting ESG Practices

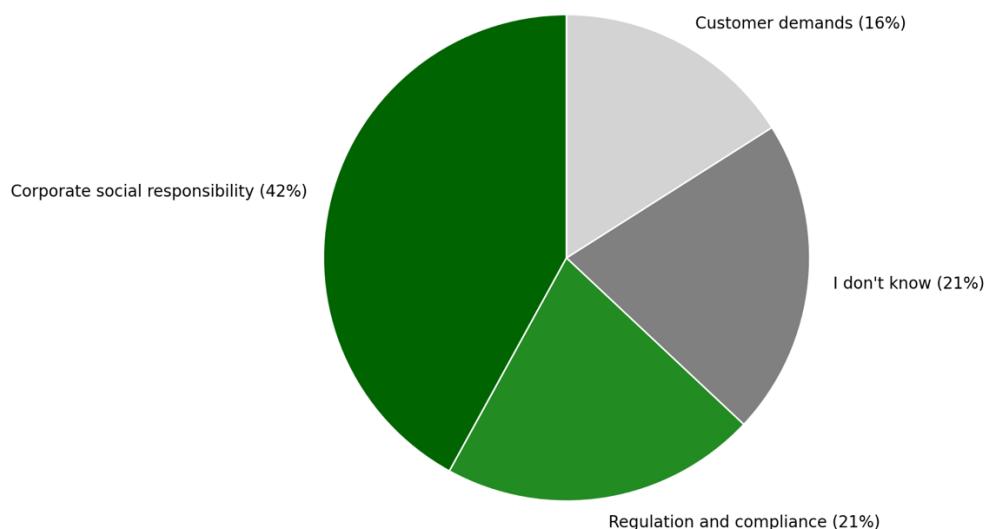


Figure 5.4.6

Main Challenges to Adopting ESG

Education and awareness are the biggest barriers to implementation, lack of awareness/understanding standing at 50 %, followed by financial constraints, limited access to training/resources and regulatory complexity.

Main Challenges in Adopting ESG Practices

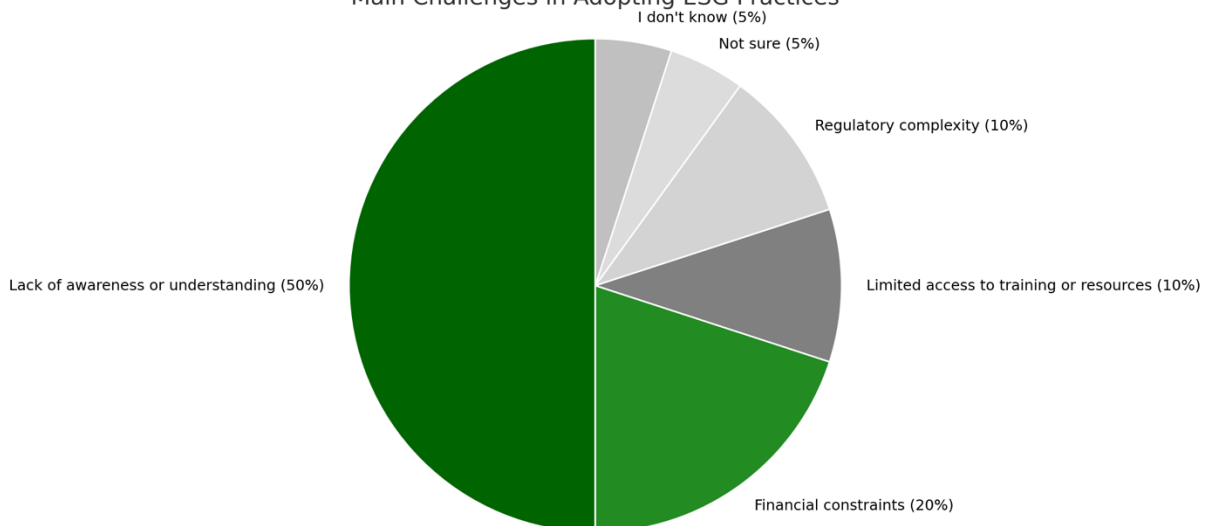


Figure 5.4.7

Availability of ESG Training in Country

With only 9.5 % of participants considering the availability of ESG training in Montenegro to be good as opposed to 33.3 % considering it poor, there is a clear need for better ESG training infrastructure at the national level (Figure 5.4.8)

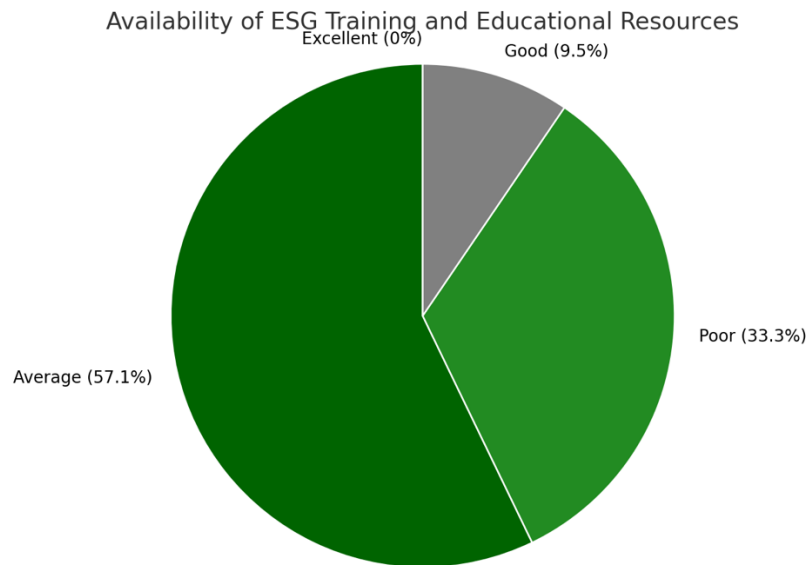


Figure 5.4.8

ESG Training Programs In-house

ESG training is largely absent or uncommunicated within organizations in Montenegro, with only 23.3% of participants having been offered ESG training in their organizations.

Types of Preferred ESG Training

When asked about ESG training, nearly all respondents expressed a strong interest in participating in professional development programs on ESG topics (Figure 5.4.9). Topics of interest include governance and ethical standards, ESG reporting and compliance and CSR.

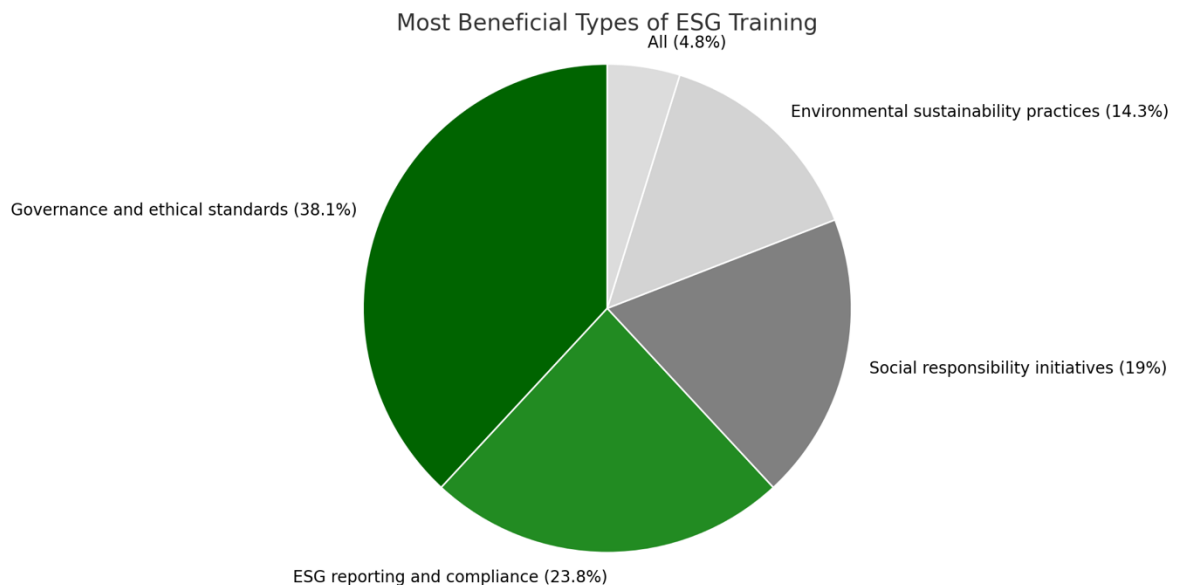


Figure 5.4.9



Future ESG Focus

Nearly half of respondents doubt any ESG expansion, indicating low confidence or prioritization, with 47.8 % calling it unlikely.

Support Needed for ESG Integration

In any move towards better ESG integration in Montenegro, government support and training access are seen as critical enablers. 52.4 % of participants cite government incentives and 33.3 % state a need for access to training as key on the path.

Role in Organization and Size of Organization

The majority of respondents (66.7 %) are employees, and 23.8 % are managers from mostly small organizations suggesting that ESG awareness and capacity may be lower than in large corporations.

Conclusion

In Montenegro, ESG is recognized as relevant but not well understood, with many organizations unsure whether ESG is being implemented. CSR and compliance are key motivators, but knowledge gaps and limited training access are major barriers. There is a strong call for government incentives, clearer regulations, and accessible training. These results confirm that while ESG is still in an early phase in Montenegro's transport and logistics sector, there is growing awareness and interest in adopting sustainable practices. Educational interventions and regulatory guidance will be key to accelerating this transition and building institutional capacity for ESG integration across the industry.

5.5 Slovenia

Familiarity with ESG Principles

Question 1: How well do you know the concept of ESG principles (environment, social and governance)?

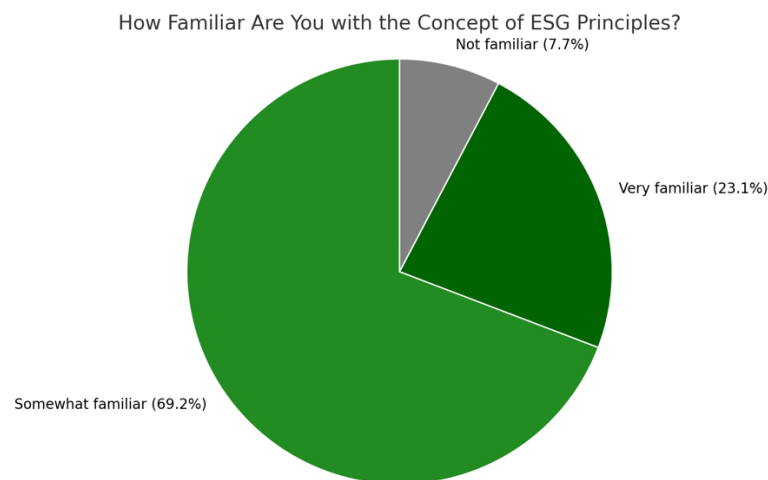
Results:

- Very Well: 23.1%
- Somewhat Well: 69.2%
- Not Familiar: 7.7%

The results indicate a majority of respondents (69.2%) possess a moderate understanding of ESG principles, while a smaller portion (23.1%) claims to know them very well. A minor segment (7.7%) is not familiar with ESG concepts, reflecting an opportunity for educational initiatives targeting foundational knowledge in ESG. Efforts



should be concentrated on enhancing awareness and education regarding ESG principles within the transport and logistics sector to fill the knowledge gap.



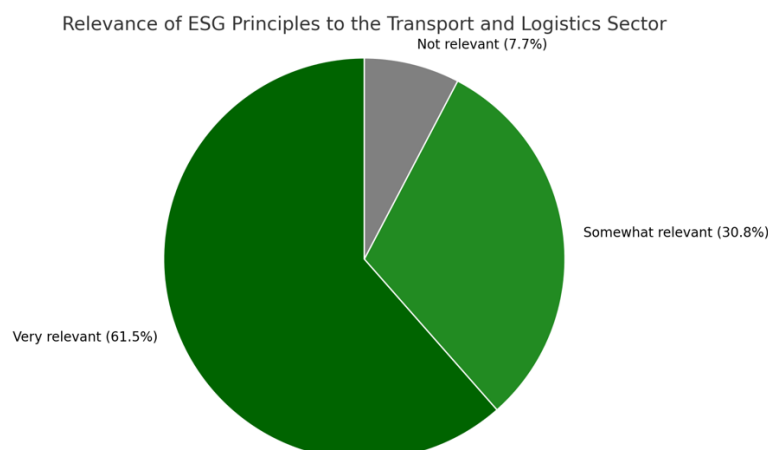
Importance of ESG Principles

Question 2: To what extent do you consider ESG principles important for the transport and logistics sector?

Results:

- Very Important: 61.5%
- Somewhat Important: 30.8%
- Not Important: 7.7%

A significant majority (61.5%) of respondents recognize the importance of ESG principles for the transport and logistics sector. This indicates a strong acknowledgment of sustainability's role in the industry's future, although 30.8% consider them only somewhat important. The findings suggest that stakeholders in Slovenia are inclined towards recognizing the potential impacts of ESG commitment, paving the way for further integration of sustainable practices.





Awareness of ESG Frameworks

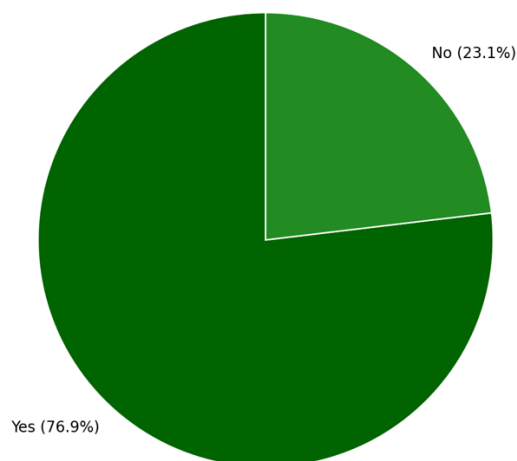
Question 3: Are you familiar with any national or international ESG frameworks or standards that apply to the sector in which you operate?

Results:

- Yes: 76.9%
- No: 23.1%

The awareness of ESG frameworks is notably high, with 76.9% of respondents acknowledging familiarity with relevant ESG standards. This awareness is crucial for compliance and integration efforts within the sector. Continued promotion of existing frameworks and clear communication about their importance is necessary to ensure organizations leverage these standards effectively.

Familiarity with National or International ESG Standards



Involvement in ESG Reporting Obligations

Question 4: Are you aware that although you may not be subject to ESG reporting obligations, you will be involved in the reporting process as part of the supply chain?

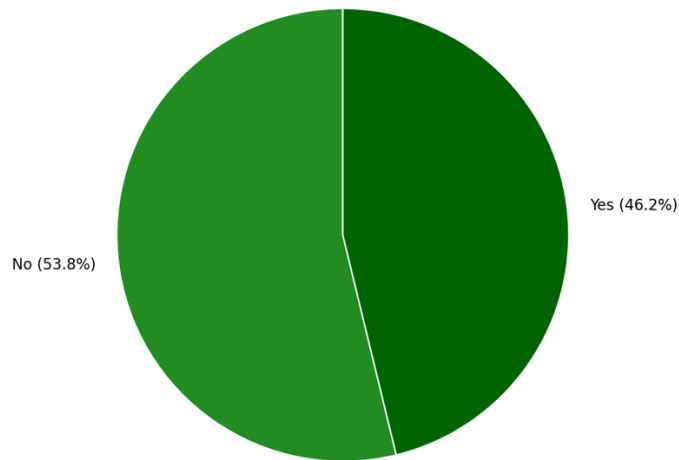
Results:

- Yes: 46.2%
- No: 53.8%

A notable 53.8% of respondents are unaware of their indirect reporting obligations concerning ESG as part of their supply chains. This lack of awareness could hinder compliance and proper implementation of reporting practices. There is a necessity to develop educational programs highlighting the implications of ESG reporting requirements and to clarify the roles that organizations play in the supply chain.



Awareness of ESG Reporting Role in the Supply Chain



Current ESG Practices Implementation

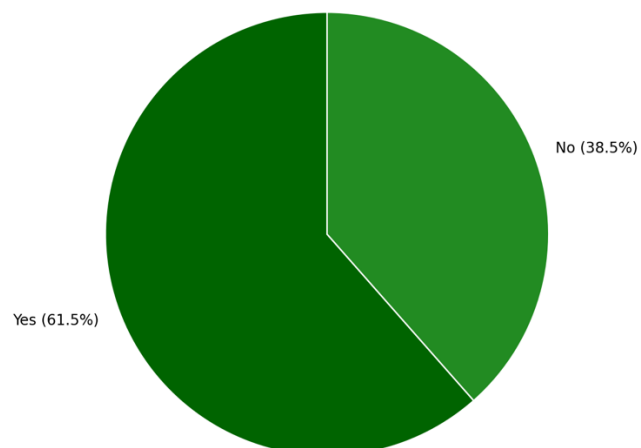
Question 5: Is your organization currently implementing ESG practices?

Results:

- Yes: 61.5%
- No: 38.5%

A majority (61.5%) of organizations are actively engaging in ESG practices. This reflects an engagement level that still allows for significant improvement, as 38.5% of respondents indicate no such implementation. Understanding the barriers faced by organizations not practicing ESG is essential to foster broader adoption and improve overall sector sustainability.

Does Your Organization Currently Implement ESG Practices?



Focus Areas for ESG Practices

Question 6: If yes, on which ESG areas does your organization focus? (Select all that apply)

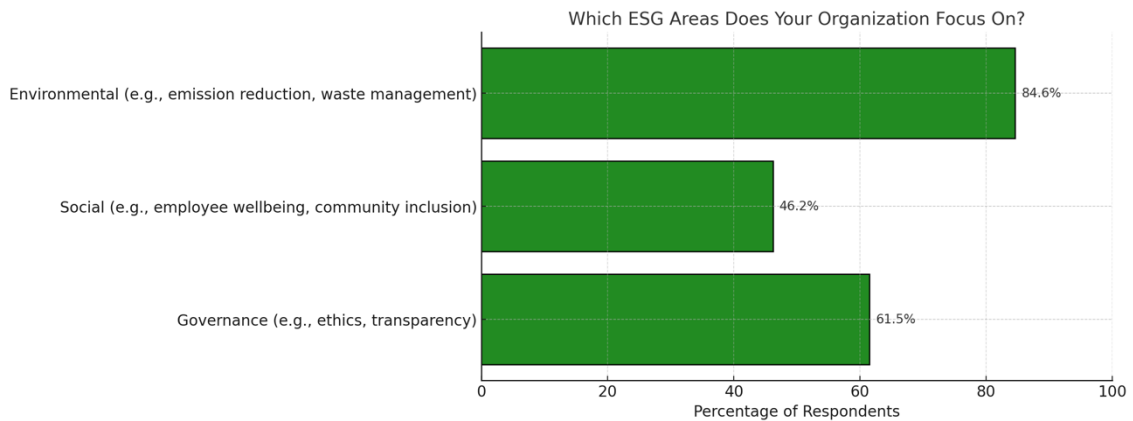


Results:

- Social (e.g., employee welfare): 6
- Environmental (e.g., emissions reduction): 11
- Governance (e.g., ethical practices): 8
- Waste Management: 11
- Community Engagement: 6

Respondents indicated multiple focus areas, with environmental practices and waste management being prioritized (both receiving 11 responses), followed by governance and social initiatives.

The focus on environmental and waste management practices reflects an inclination towards addressing ecological impacts, while further engagement in social and governance aspects is needed for a holistic approach to ESG.



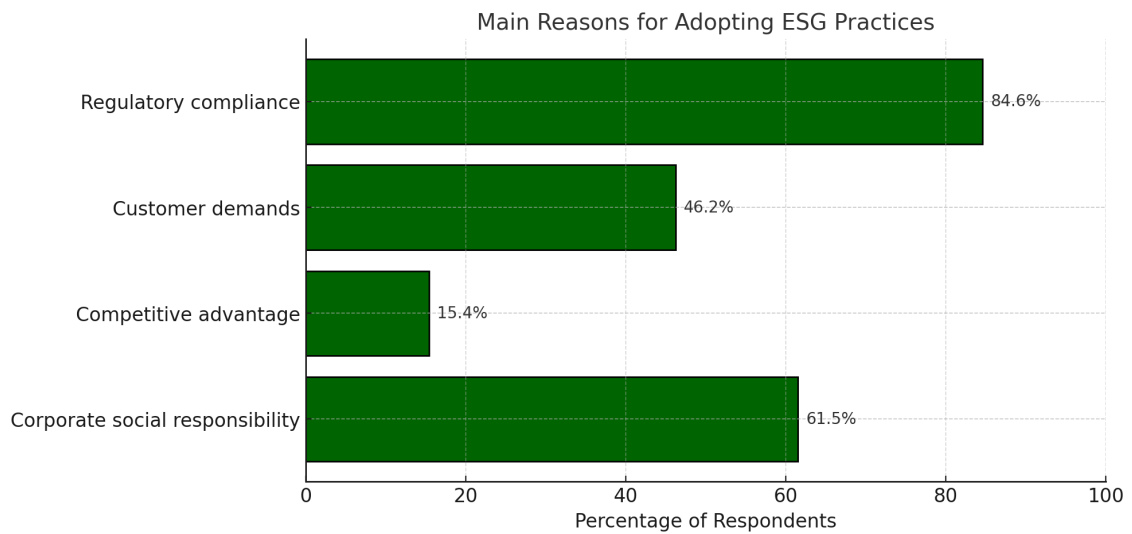
Drivers for Adopting ESG Practices

Question 7: What are the main reasons for implementing ESG practices in your organization? (Select all that apply)

Results:

- Regulatory Compliance: 11
- Customer Demands: 6
- Corporate Social Responsibility: 8
- Competitive Advantage: 2

Regulatory compliance emerges as the principal driver for the implementation of ESG practices, with considerable emphasis on corporate social responsibility as well. Recognizing the regulatory framework as a primary motivator can guide policymakers in crafting supportive legislation that encourages ESG integration.



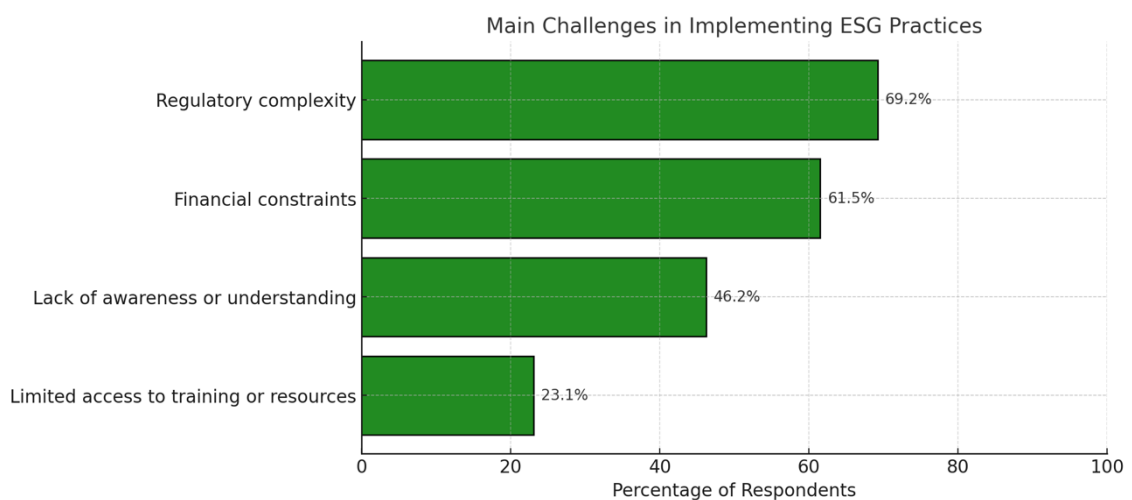
Main Challenges in ESG Adoption

Question 8: What are the main challenges your organization faces in implementing ESG practices? (Select all that apply)

Results:

- Regulatory Complexity: 9
- Financial Constraints: 8
- Lack of Awareness: 6
- Limited Training Access: 3

The greatest challenges hindering ESG adoption include regulatory complexity (9 responses) and financial constraints (8 responses), with lack of awareness being significant but less pervasive. Targeted support programs are essential to overcome these hurdles, focusing on educational outreach and financial assistance.





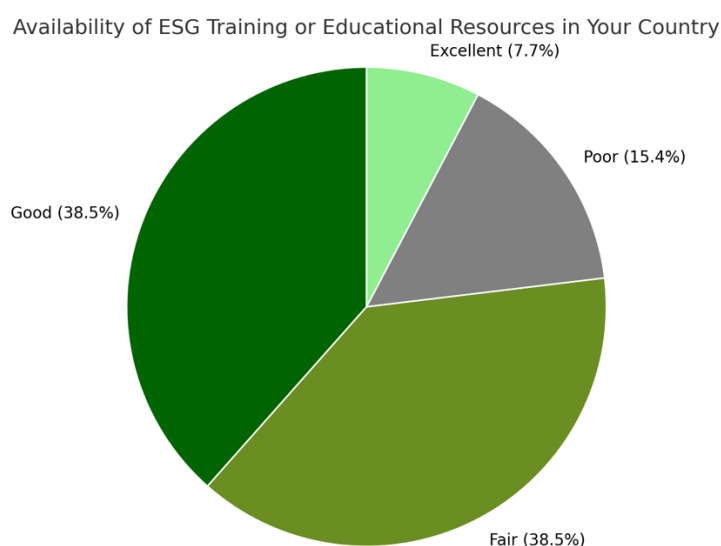
Availability of ESG Training

Question 9: How do you assess the availability of ESG-related training or educational resources in your country?

Results:

- Good: 38.5%
- Fair: 38.5%
- Poor: 15.4%
- Excellent: 7.7%

Responses indicate moderate to positive perceptions regarding the availability of ESG training resources, albeit with room for improvement, especially given the 15.4% rating it as poor. A more expansive offering of training programs is needed to address existing gaps and improve overall ESG literacy in the sector.



ESG Training Provided

Question 10: Has your organization provided any ESG-related training for employees?

Results:

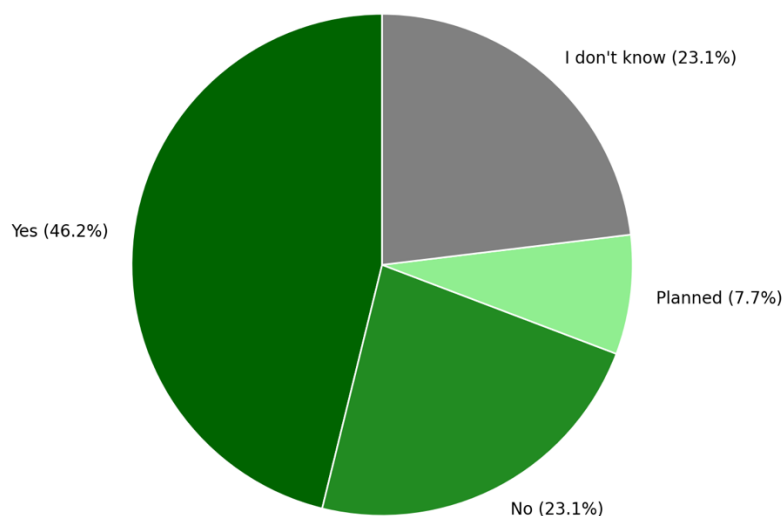
- Yes: 46.2%
- No: 23.1%
- I do not know: 23.1%
- We are planning: 7.7%

Fewer than half of the organisations surveyed (46.2 %) have already delivered ESG-related training to their employees, while almost one quarter (23.1 %) explicitly report that no such programmes have been offered to date. An equivalent share (23.1 %) is



uncertain about the existence of internal ESG training, suggesting either limited communication or a lack of central oversight. Only a marginal proportion (7.7 %) indicates that training is currently under preparation. The prevalence of formal ESG training in Slovenian transport-and-logistics organisations remains moderate. The appreciable levels of non-implementation and uncertainty highlight both an information gap and a need for structured, organisation-wide educational initiatives. Encouraging clearer internal communication and accelerating planned training programmes would strengthen workforce competence and foster consistent ESG integration across the sector.

Has Your Organization Provided ESG-Related Training to Employees?



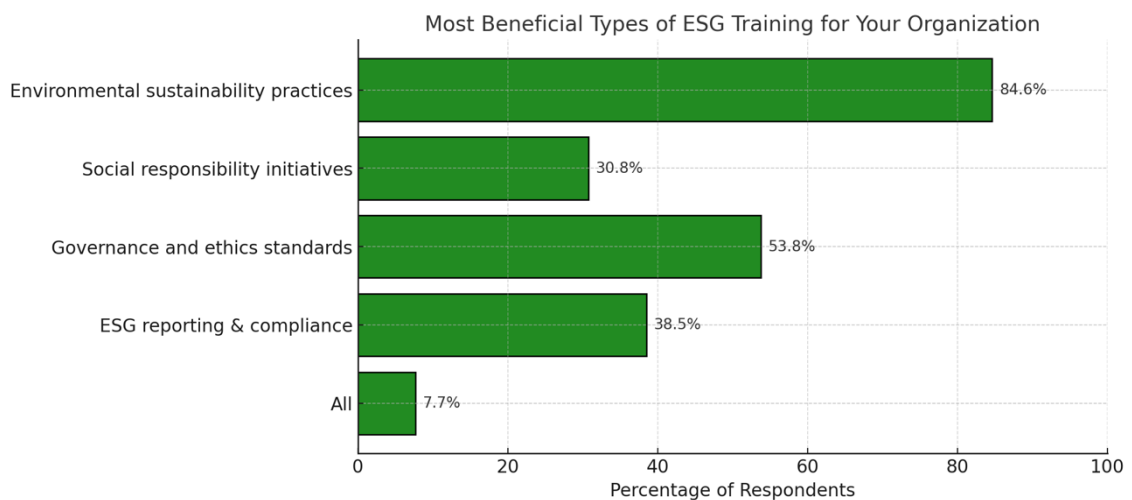
Types of Preferred ESG Training

Question 11: What type of ESG training would be most beneficial for your organization?
(Select all that apply)

Results:

- ESG Reporting and Compliance: 5
- Sustainable Development Practices: 11
- Governance Standards and Ethics: 7
- Social Responsibility Initiatives: 4

The preference for training largely favors sustainable development practices, indicating a demand for practical knowledge that can directly enhance organizational operations. Focusing training efforts on sustainable practices will resonate with organizational needs and advance ESG integration at a practicable level.



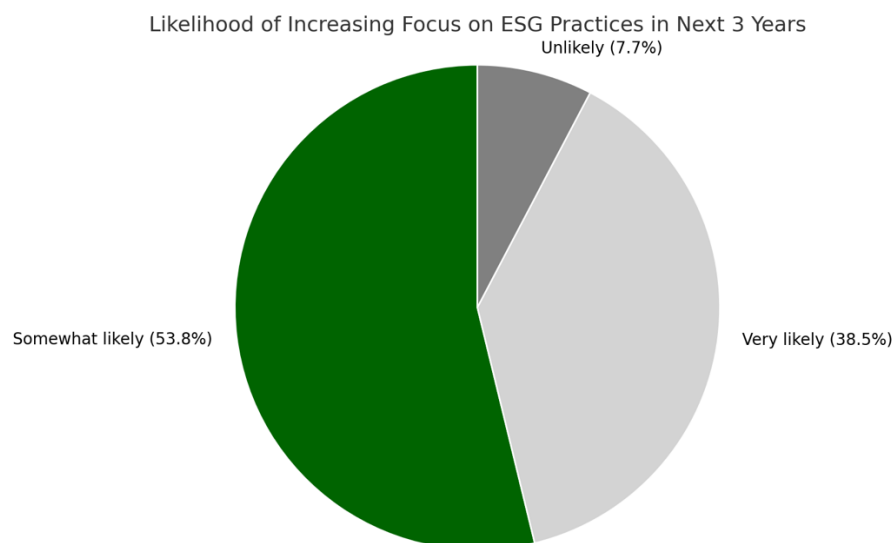
Future ESG Focus

Question 12: How likely is it that your organization will increase its focus on ESG practices in the next 3 years?

Results:

- Very Likely: 38.5%
- Somewhat Likely: 53.8%
- Unlikely: 7.7%

A majority (92.3%) of respondents are optimistic about increasing their focus on ESG within the next three years, revealing a strong belief in the importance of sustainability. This positive outlook should be leveraged to build on existing initiatives and further enhance the sector's commitment to sustainability.





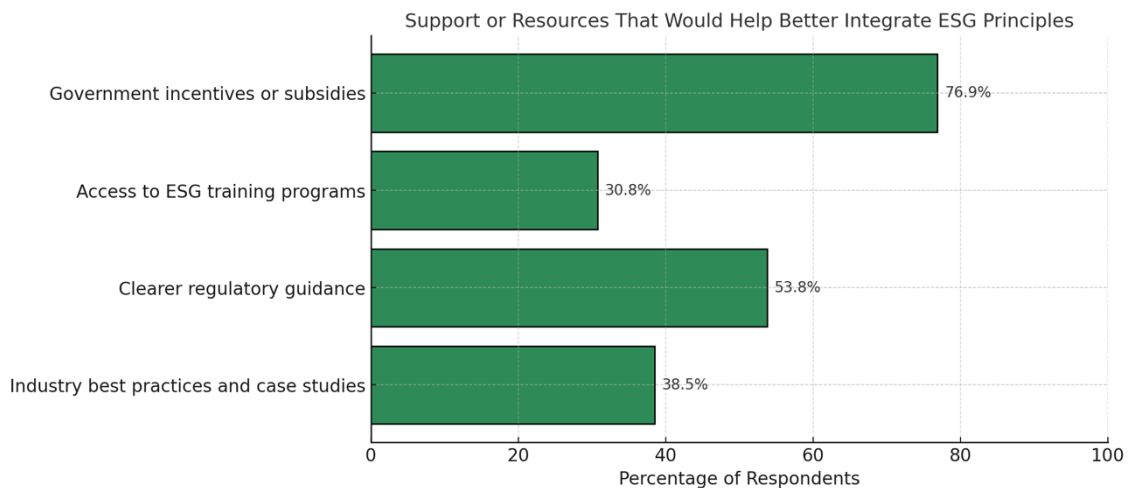
Support Needed for ESG Integration

Question 13: What support or resources would help your organization better integrate ESG principles? (Select all that apply)

Results:

- Clear Regulatory Guidelines: 7
- Government Incentives: 10
- Access to ESG Training Programs: 4

The data reflects a significant need for clearer guidelines and government incentives to support ESG integration, highlighting the role of supportive regulatory frameworks. Providing structured support mechanisms will foster a conducive environment for organizations to engage in meaningful ESG efforts.



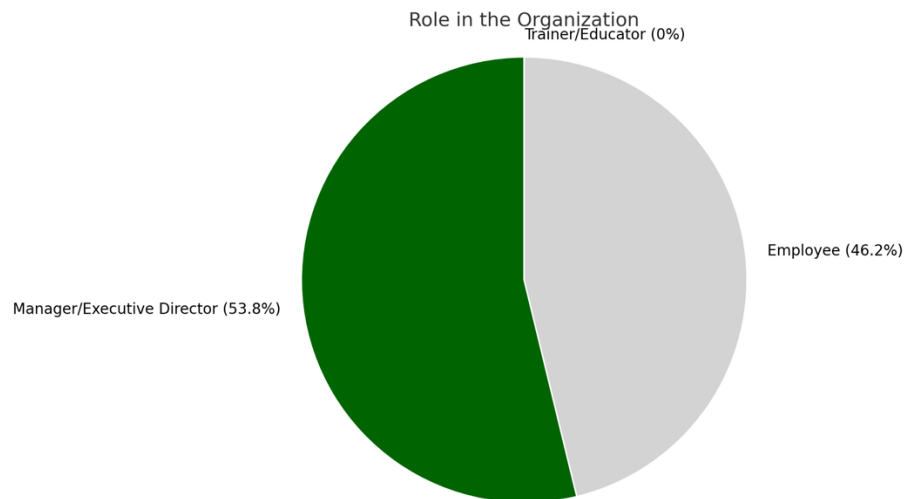
Role in Organization

Question 14: What is your role in the organization?

Results:

- Manager/Executive Director: 53.8%
- Employee: 46.2%

A balanced representation of roles is evident, with nearly equal participation from executives and employees, which is beneficial for addressing ESG from both strategic and operational perspectives. This balanced representation should encourage collective engagement in ESG initiatives, driving integration from both leadership and operational levels.



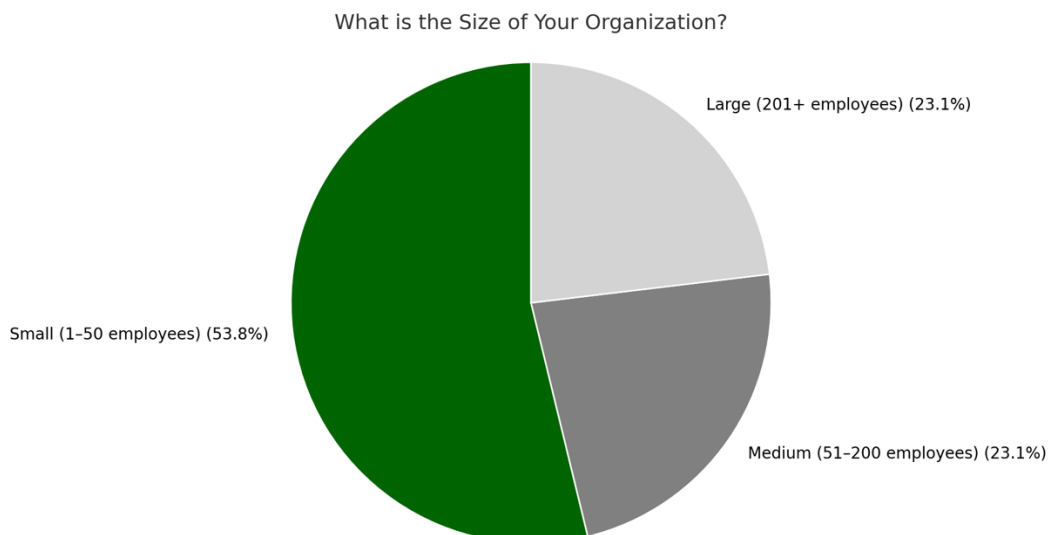
Organization Size

Question 15: What is the size of your organization?

Results:

- Small (1–50 employees): 53.8%
- Medium (51–200 employees): 23.1%
- Large (201+ employees): 23.1%

A majority of respondents hail from small organizations, with medium and large organizations equally represented. This suggests a significant segment of smaller firms engaged in the sector. Strategies tailored for smaller organizations are essential to enhance their capacity to implement and sustain ESG practices.



Country of Organization

Question 16: In which country is your organization?

**Results:**

- Slovenia: 100%

All respondents are based in Slovenia, confirming the survey's exclusive focus on this region. The complete representation of Slovenian organizations provides a clear view of local practices and conditions pertaining to ESG integration within the transport and logistics sector.

Conclusion

The analysis of the survey responses from Slovenia's transport and logistics sector reveals a significant opportunity and need for enhanced engagement with Environmental, Social, and Governance (ESG) principles. The findings indicate a moderate familiarity with ESG concepts, with 69.2% of the respondents claiming a somewhat knowledgeable understanding and only 23.1% feeling very well-informed. This suggests that educational initiatives aimed at enhancing awareness and understanding of ESG within the sector are necessary. Furthermore, while a substantial 61.5% of respondents recognize the importance of ESG principles, a notable proportion is still unsure of their indirect reporting requirements, with 53.8% unaware of their potential involvement in supply chain obligations related to ESG reporting. Therefore, targeted outreach and awareness-building campaigns could be instrumental in alleviating this uncertainty. The commitment to ESG practices appears promising, with 61.5% of organizations presently implementing such measures. However, barriers such as regulatory complexity and financial constraints are significant challenges, as highlighted by 69.2% and 61.5% of the respondents, respectively. This reinforces the necessity for clearer regulatory frameworks and potential financial support to facilitate wider adoption of ESG practices. Regarding training opportunities, while 38.5% rate the availability of training resources as good, another 15.4% perceive these resources as poor, indicating a requirement for the development of more comprehensive training programs. This is further supported by the fact that 46.2% of organizations have provided ESG-related training, highlighting both engagement and a gap where additional training is needed. The survey responses also suggest a positive outlook regarding future engagement with ESG practices, with 92.3% of participants indicating a likelihood to increase their focus on these principles over the next three years. Given that a significant portion of the respondents holds managerial positions, strategic engagement from leadership will be critical to drive change. While Slovenia's transport and logistics industry shows readiness for ESG integration, fostering a culture of sustainability through robust education, comprehensive training programs, and supportive regulatory measures will be essential for achieving its sustainability goals effectively.



6. Comparative Analysis

Legal and Regulatory Frameworks

Regional approaches to ESG in transport and logistics vary widely, reflecting each country's EU integration status and domestic governance. **Slovenia** and **Croatia**, as EU members, operate under robust sustainability reporting mandates. Slovenia's adoption of the EU Non-Financial Reporting Directive and the forthcoming Corporate Sustainability Reporting Directive (CSRD) has significantly improved corporate transparency and ESG. Croatian legislation is similarly harmonized with EU directives: the Accounting Law and Audit Law (aligned with CSRD) require large companies to publish sustainability reports covering environmental, social, and governance. These EU-aligned frameworks compel organizations in Slovenia and Croatia to collect ESG data, undergo audits, and publicly report progress, creating legal pressure for ESG integration. In contrast, the Western Balkan states are still developing comparable frameworks. **Bosnia and Herzegovina's** transport policy incorporates some ESG elements but lacks effective implementation and enforcement; weak regulations (especially in rail and aviation) and limited oversight hinder. **Montenegro** has proactively drafted an ambitious Transport Development Strategy 2019–2035 embedding EU Green Deal principles and emission targets, and has updated laws on environmental impact assessment, road emissions standards, rail safety, and maritime pollution to mirror EU. However, implementation in Montenegro has lagged an OECD review noted delays once the initial action plan expired in. **Kosovo**, aspiring to EU accession, is aligning with European green policies through national plans like the National Environmental Action Plan and the Pristina Green City Action Plan. These initiatives, supported by international partners, introduce sustainability criteria for urban transport and infrastructure. Still, Kosovo and its neighbors have yet to impose broad ESG reporting obligations on companies. Common across the region is the recognition that clearer regulations are needed: surveys in multiple countries show stakeholders calling for more explicit ESG guidelines and legal requirements to drive sector-wide compliance. The legal landscape thus ranges from EU-driven comprehensive reporting regimes in Slovenia and Croatia to nascent or partial frameworks in Bosnia and Herzegovina, Montenegro, and Kosovo, where policy harmonization with EU standards is an ongoing process.

Stakeholder Engagement

Effective ESG integration in transport and logistics relies on multi-level stakeholder engagement, and each country's ecosystem reflects different strengths. **Government agencies** play a pivotal role everywhere. In Bosnia and Herzegovina, a complex governance structure (state, entity, and cantonal transport ministries) shares responsibility for sustainable transport policy and safety oversight. Fragmentation poses coordination challenges, but national bodies like the Foreign Trade Chamber have stepped in to promote ESG awareness, actively encouraging companies to adopt



sustainable practices to boost competitiveness. **Croatia** benefits from strong industry and institutional engagement: the Croatian Chamber of Commerce has even developed an ESG rating questionnaire to spur companies to improve sustainability standards. The Croatian Employers' Association (HUP) and other bodies provide ESG training and guidance to firms, indicating a high level of private-sector initiative and partnership with educational institutions. In **Kosovo**, stakeholder mapping reveals significant involvement of international organizations alongside local authorities. The Ministry of Infrastructure has launched a Multimodal Transport Strategy emphasizing green transport, and the Municipality of Pristina collaborates with the UNDP on campaigns to shift commuters toward sustainable mobility. Donor-funded projects (e.g. EBRD's "Pristina Urban Transport II") and public enterprises like Trainkos (railways) and the Pristina bus company are modernizing fleets and infrastructure, illustrating public-private and international partnerships driving ESG improvements. **Montenegro** shows a similar pattern: the national transport strategy was co-developed by the University of Montenegro and the Transport Ministry, exemplifying academic-government collaboration. Public-private partnerships are emerging to support ESG goals for instance, the government and UNDP have backed climate action education, and even private entities like the American Chamber of Commerce in Montenegro and local banks have launched their own ESG initiatives. **Slovenia's** stakeholder environment is comparatively advanced. Regulators not only enforce EU-aligned ESG reporting but also work with industries on green economy initiatives, using policy incentives and fiscal support to encourage sustainable logistics practices. Leading Slovene transport/logistics companies (e.g. Port of Koper, Pošta Slovenije) are early adopters of ESG, implementing green port initiatives, fleet electrification, and efficiency innovations that set industry benchmarks. Across all five countries, there is a growing acknowledgment that broad stakeholder coalitions governments, industry associations, companies, educators, and international partners are crucial to mainstream ESG. Each country offers models for engagement: from Croatia's industry-led coalitions to Kosovo's donor-supported projects. Regional forums such as the EU's Transport Community Treaty are poised to facilitate broader cooperation, enabling stakeholders from different countries to share best practices and coordinate sustainable infrastructure improvements.

ESG Training Availability and Education

Building ESG capacity through training is a clear need throughout the region, though the availability of ESG-specific education varies. **Bosnia and Herzegovina** currently reports the most severe gaps. Survey data indicate only ~3.6% of Bosnian transport and logistics organizations provide any ESG training to staff, and nearly 40% of industry professionals rate ESG training opportunities as poor. This correlates with low ESG awareness in BiH and underscores the need for basic educational initiatives. **Montenegro** faces a similar shortfall: only about 9.5% of respondents in Montenegro judged domestic ESG training resources to be good, while one-third labeled them poor. Just 23% had ever been offered ESG training in their organization. These figures highlight a nascent training infrastructure. All Western Balkan cases show strong demand for learning in Bosnia, 64% of surveyed professionals called for education on environmental sustainability and nearly half on governance and ethics, and in Montenegro almost all respondents



expressed interest in professional ESG development programs. By contrast, **Slovenia** and **Croatia** demonstrate more developed ESG educational support, though still with room for growth. In Croatia, several universities and institutes have incorporated sustainability into transport and logistics curricula (e.g. University of Zagreb's programs on transport engineering include ESG topics) and organizations like the CISD and HUP regularly host ESG workshops. Still, only 20% of Croatian survey respondents said their company provides internal ESG training, and over half were unsure, indicating many firms lack formal programs. **Slovenia** stands out: about 46% of Slovenian transport/logistics organizations have delivered ESG-related training to employees. National respondents also had comparatively positive views on training availability over 77% rated resources fair to good. This suggests that Slovenia's more mature ESG ecosystem extends to education, likely reflecting its stronger institutional support for sustainability. **Kosovo** falls in between: while only 13.8% of surveyed Kosovar professionals report having received ESG training, a notable portion consider existing resources adequate or even excellent. About one-third rated Kosovo's ESG training availability as good, and 20.7% as excellent, perhaps due to ad-hoc workshops and donor-led programs. Preference surveys reveal common training needs across countries for example, Croatian and Kosovar respondents prioritized governance/ethics and ESG reporting know-how in future trainings, while Montenegrin stakeholders voiced interest in governance standards and corporate social responsibility topics. These trends point to an opportunity for collaborative development of ESG training curricula. Erasmus+ project partnerships or regional centers of excellence could harmonize training efforts, leveraging the more advanced educational initiatives in EU member states to benefit the whole region. Strengthening ESG training networks would directly address one of the key barriers to ESG adoption identified in every country the lack of knowledge and expertise.

Implementation Practices and ESG Integration

The degree of ESG practice implementation in the transport and logistics sector differs markedly across the five countries, although all are at an early to intermediate stage of maturity. **Slovenia** currently leads in practical ESG integration. According to recent survey data, 61.5% of Slovenian transport and logistics organizations report that they are actively implementing ESG measures, the highest share among the countries. These firms tend to prioritize environmental management and operational eco-efficiency: for instance, waste reduction and emissions-cutting practices were cited most frequently by Slovenian respondents (in as many as 11 cases each, out of 13 respondents). Governance improvements (ethical practices, transparency) and social initiatives (employee welfare, community engagement) are being addressed as well, though to a slightly lesser extent, indicating a need for a more balanced approach moving forward. **Croatia** and **Kosovo** have a moderate level of ESG adoption. In Kosovo's logistics sector, around 45% of organizations have begun applying ESG practices, and an overwhelming majority (93% of respondents) consider ESG important for the industry's future. Companies in Kosovo that implement ESG tend to focus on social aspects (e.g. employee well-being programs, community initiatives) at 41.4%, followed by environmental actions (31%) and governance reforms (27.6%). This emphasis suggests



that corporate social responsibility has been an entry point for ESG in Kosovo's transport sector. Croatia's adoption is somewhat cautious: only 16% of Croatian respondents confirmed that their organizations currently conduct ESG reporting or similar structured practices. Many Croatian logistics professionals initially perceived ESG as not directly relevant to their operations (56% said "not relevant" in 2025), reflecting a disconnect that is gradually being overcome. Nevertheless, those Croatian companies embracing ESG often do so for strategic reasons competitive advantage was the leading driver for adoption (47.4% of respondents) and tend to align with international standards given Croatia's EU obligations. **Montenegro** and **Bosnia and Herzegovina** are in the earliest stages of ESG implementation, with relatively few firms taking concrete action so far. In Montenegro, only about 28.6% of surveyed organizations have initiated any ESG measures, and a large proportion of practitioners remain unsure whether their companies are doing anything in this arena. Montenegro's current ESG efforts appear to center on social responsibility and compliance basics; corporate social responsibility (CSR) was noted as the leading motivator for ESG uptake, and many respondents were unclear on deeper strategic rationales. A similarly low baseline is observed in Bosnia and Herzegovina, where ESG reporting is not yet common practice, 46.4% of Bosnian logistics professionals said their organizations do not engage in ESG reporting, and 32.1% were unsure. Among the limited ESG initiatives in BiH, the primary focus has been on social issues like employee welfare (nearly 47% cited this), with environmental efforts (35.3%, e.g. modest fuel efficiency or emission reduction steps) second, and governance improvements lagging. These patterns illustrate that in the absence of strong regulatory mandates, companies in the Western Balkans often start with CSR-type activities and ad-hoc environmental measures rather than comprehensive ESG strategies.

Notwithstanding different maturity levels, there are **common drivers and barriers** influencing ESG implementation across the region. External pressures are a dominant theme. In Slovenia, **regulatory compliance** is the top-cited reason for implementing ESG, followed by a sense of corporate social responsibility. This mirrors Croatia, where regulation and strategic competitiveness drive ESG decisions. In Bosnia and Herzegovina, Kosovo, and Montenegro, **social responsibility and client demands** feature prominently as motivations, for example, 67.9% of Bosnian respondents pointed to "social responsibility" and over half to customer demands as key drivers for ESG adoption. These findings suggest that reputation and stakeholder expectations (from clients or foreign partners) are pushing companies to consider ESG, even in environments where formal enforcement is weak. Conversely, internal motivations (such as ethical leadership or long-term risk management) were seldom top-ranked, indicating an area for growth as ESG awareness matures. All five countries also face **similar obstacles** that impede broader ESG practice. *Regulatory complexity* and uncertainty is a recurring issue: companies struggle when ESG guidelines are unclear or constantly evolving. In Kosovo, 37.9% of respondents flagged complicated regulations as the primary barrier to ESG implementation, and Slovenian firms likewise identified regulatory complexity as their greatest challenge (noted by 9 out of 13 respondents). **Financial constraints** are the other major hurdle the cost of new technologies, compliance, or certification can be prohibitive. Over one-third of Montenegrin and around half of Slovenian stakeholders indicated that limited financial resources constrain their ESG efforts. **Knowledge and capacity gaps** persist as well, particularly in the Western



Balkans: lack of awareness/understanding was the single biggest barrier in Montenegro (50% of respondents) and Bosnia and Herzegovina (67.9%), though it was a less dominant factor in Croatia and Kosovo where basic awareness is somewhat higher. Limited access to training or expert support, as noted by about one-third of Croatian respondents, further exacerbates these challenges. The net effect is that while pockets of progress exist (especially in EU-aligned contexts), systemic hurdles still prevent ESG from becoming standard practice in transport and logistics enterprises region-wide.

Conclusion and Opportunities for Regional Collaboration

Across Bosnia and Herzegovina, Croatia, Kosovo, Montenegro, and Slovenia, this comparative analysis reveals both convergence and divergence in ESG standards and practices. On one hand, there is a **shared trajectory**: all five countries are increasingly cognizant of the importance of ESG principles for sustainable development in transport and logistics. Stakeholders uniformly recognize that improving environmental performance, social outcomes, and governance in this sector is crucial to its long-term competitiveness and alignment with European trends (in Slovenia, 92.3% of surveyed practitioners are optimistic about expanding ESG focus in the next three years, and similar forward-looking sentiment is echoed elsewhere). Additionally, each country has begun establishing the building blocks for ESG integration, whether through new laws, pilot projects, educational programs, or industry initiatives. Yet, the **pace and depth of ESG adoption** differ notably. EU members Slovenia and Croatia are ahead in formal frameworks and corporate uptake, evidenced by stringent reporting requirements and higher rates of ESG activity. In the Western Balkan states, ESG integration remains in earlier stages: Bosnia and Montenegro still face foundational challenges of awareness and institutional capacity, while Kosovo is making strides under the impetus of EU-oriented reforms and international support. These discrepancies highlight areas where targeted interventions could yield significant benefits.

Crucially, the study identifies several **promising models and practices** that could be emulated or scaled through regional cooperation. Slovenia's experience underscores the value of a strong legal mandate combined with government incentives: its enforcement of EU-aligned ESG disclosure rules has tangibly improved sustainability reporting even among smaller firms, and multi-level governance has leveraged public-private partnerships to green the logistics industry. Croatia demonstrates how **industry-led engagement** can complement regulation, the creation of ESG self-assessment tools by its Chamber of Commerce and the active role of professional associations in training have fostered a collaborative atmosphere for sustainability in logistics. In the Western Balkans, local innovations and donor-backed initiatives serve as valuable pilots. For example, the adoption of Sustainable Urban Mobility Plans in Bosnian cities like Sarajevo and Bijeljina shows how municipal-level action can integrate ESG goals into transport planning. In Kosovo, investments in modernizing urban transport (new low-emission buses and rail upgrades) through EBRD and World Bank projects illustrate how external financing and expertise can drive ESG outcomes on the ground. Montenegro's comprehensive national strategy, albeit slow to implement, provides a roadmap aligning transport development with ESG benchmarks and explicitly calls for ESG training and public-private innovation partnerships a vision that could inform neighboring countries'



policy design. These examples represent a **knowledge base of effective practices** that, if exchanged regionally, can accelerate ESG progress.

The analysis also highlights key **areas where regional cooperation or policy harmonization is beneficial**. One such area is the alignment of standards and regulations. As supply chains and transport networks in Southeast Europe are interlinked, a more harmonized approach to ESG (for instance, adopting similar reporting standards or environmental requirements across countries) would ease compliance burdens and raise the baseline for all. Western Balkan countries, in particular, could coordinate their adoption of EU ESG directives so that companies operating across borders face consistent expectations. Regional bodies and initiatives like the Transport Community Treaty, CEFTA, or dedicated Erasmus+ partnerships provide platforms to develop unified guidelines and share technical know-how. Another critical area is **capacity-building and training**, where joint efforts could significantly leverage resources. Given the widespread need for ESG education, a collaborative development of curricula (for example, an Erasmus+-funded program to train transport and logistics professionals in ESG management) could draw on expertise from universities in Slovenia or Croatia and address gaps in Bosnia, Kosovo, and Montenegro. Survey respondents across countries specifically called for more government incentives, clearer guidelines, and access to training to support ESG integration, underlining that improved support systems would be welcomed industry-wide. A regional consortium could thus design specialized training modules, certification schemes, or workshops that serve multiple countries, creating economies of scale and fostering a shared ESG culture.

While the five countries differ in their current ESG implementation levels, they face common challenges and stand to gain from collective action. By learning from each other's successes; Slovenia's regulatory rigor, Croatia's stakeholder engagement, Kosovo's international partnerships, Montenegro's strategic planning, and Bosnia and Herzegovina's grassroots initiatives, Southeast Europe's transport and logistics sector can move toward a more **sustainable and harmonized future**. Regional cooperation, through policy harmonization and joint capacity-building efforts, will be pivotal in bridging gaps. Such an approach promises not only to elevate ESG performance in each country but also to enhance cross-border synergy and resilience, aligning the entire region with emerging European standards of sustainable transport and logistics. The findings of this comparative analysis thus provide a foundation for informed policy-making and collaborative projects (such as the Erasmus+ initiative in question) aimed at embedding ESG principles more deeply into the fabric of South East Europe's transport and logistics industries.



7. Conclusion

The following recommendations provide an academic yet practical roadmap for designing a curriculum on Environmental, Social, and Governance (ESG) in the transport and logistics sector. They are grounded in research findings from the SEE-GL project's analysis of ESG practices across Bosnia and Herzegovina, Croatia, Kosovo, Montenegro, and Slovenia. The emphasis is on actionable guidance for Vocational Education and Training (VET), continuing education, and lifelong learning programs, ensuring that the curriculum is informed by real-world insights and tailored to regional needs. By integrating local case studies and fostering collaboration among stakeholders, these recommendations aim to build capacity for sustainable logistics and to align the Western Balkans with emerging European ESG standards.

Integrating Research Insights into Curriculum Development

Address identified knowledge gaps: Research reveals a widespread lack of ESG awareness and formal training in the region's transport and logistics workforce. For instance, in Bosnia and Herzegovina over 82% of surveyed professionals reported being not well-informed about ESG principles, and only ~3.6% of organizations provide any ESG-related training to staff. Even in EU-member Croatia, just 20% of transport/logistics respondents said their company offers internal ESG training. These findings underscore the need for **curriculum modules that start with foundational ESG concepts**, ensuring that learners understand core principles (environmental stewardship, social responsibility, corporate governance) and why they matter for competitiveness and compliance. Early modules should demystify ESG terminology, standards, and benefits, directly addressing the low baseline awareness documented in surveys. By building basic literacy in sustainability and ethics, the curriculum can fill a critical gap and enable professionals to engage meaningfully with ESG initiatives.

Align with industry needs and standards: The curriculum must translate research insights into **practical skills and knowledge areas demanded by the sector's evolving landscape**. Analysis from SEE-GL highlights that companies across the Western Balkans are beginning to face new ESG requirements through EU-aligned regulations and market pressures. For example, Croatia, as an EU member, has incorporated the European Sustainability Reporting Standards (ESRS) into national law, mandating large companies to disclose environmental, social, and governance performance. However, a shortage of qualified specialists to implement these standards is evident the Croatian logistics sector "requires a qualified workforce" in sustainable supply chain management, yet currently "lacks suitable specialists," which is already **limiting growth** in the industry. In Kosovo and other accession countries, studies similarly note **gaps in VET curricula** when it comes to ESG-specific competencies for transport and logistics. Therefore, the curriculum should be explicitly designed to **impart the competencies needed to meet new ESG reporting and compliance obligations** (e.g. carbon accounting, health & safety management, ethics and anti-corruption in



logistics) and to respond to stakeholder expectations. This entails modules on topics like sustainable fleet management, emissions reduction strategies, workplace safety and labor rights, supply chain due diligence, and ESG data reporting. Embedding current frameworks such as the EU Green Deal targets, Corporate Sustainability Reporting Directive (CSRD), and relevant national regulations – will ensure the curriculum is aligned with the standards that companies must follow. By equipping learners with up-to-date regulatory knowledge and practical skills (for example, how to prepare a basic sustainability report or implement fuel-efficient logistics operations), the program makes ESG principles actionable in daily business practice.

Adopt a holistic ESG perspective: The curriculum design should reflect that ESG in transport/logistics is multi-faceted. Research from Slovenia’s experience shows that leading firms integrate all three ESG dimensions – environmental, social, and governance – into their operations. To mirror this, the course content must go beyond environmental issues alone. For instance, alongside teaching green logistics techniques (route optimization, intermodal transport, alternative fuels), equal weight should be given to **social aspects** (e.g. employee health and safety training, diversity and inclusion in the logistics workforce) and **governance topics** (e.g. corporate ethics, transparency in supply chains). Case analyses from the region illustrate this balance: Slovenian transport companies have invested in comprehensive worker training on safety and new technologies as part of their ESG efforts, and many firms emphasize community engagement and ethical governance as integral to sustainability. A well-rounded curriculum will thus prepare learners to implement ESG holistically for example, by including simulations or assignments on improving a company’s carbon footprint **and** its labor practices. Such an approach ensures that graduates of the program can drive improvements across all ESG pillars, reflecting the research insight that sustainability performance is tied to both operational efficiency and social responsibility.

Embedding Regional Case Studies for Contextual Relevance

Use local examples to bridge theory and practice: To make ESG concepts tangible, the curriculum should integrate **practical case studies drawn from the region** so that learners connect abstract principles with real-world outcomes. Each of the five countries offers illustrative examples that can be woven into coursework, enriching the learning experience with context-specific insights:

- **Bosnia and Herzegovina:** Municipal initiatives like the adoption of Sustainable Urban Mobility Plans in cities such as Sarajevo and Bijeljina show ESG goals in action at the local level, aligning urban transport planning with environmental and social standards. A case study on Sarajevo’s SUMP can demonstrate how improving public transport and pedestrian infrastructure yields ESG benefits (reduced emissions, improved road safety) and what challenges arise in implementation.
- **Kosovo:** Donor-supported green transport projects provide rich learning material. For example, the EBRD-funded **“Prishtina Urban Transport”** modernization (introducing low-emission buses and rail upgrades) illustrates how external financing and expertise can drive sustainability outcomes on the ground. Examining this project in the curriculum would highlight cost-benefit tradeoffs of



investing in cleaner fleets, and how such initiatives tie into Kosovo's wider Green City Action Plan. Students can analyze project data to understand impacts on fuel consumption and urban air quality.

- **Montenegro:** National policy efforts offer a strategic perspective. Montenegro's comprehensive Transport Development Strategy 2019–2035 explicitly calls for integrating ESG benchmarks and even mandates **ESG training in transport management**, coupled with public–private innovation partnerships. This example can be used as a case where learners evaluate policy design versus implementation; notably, the OECD has observed delays in executing this strategy, prompting discussion on governance challenges. Including this case in the curriculum links classroom learning to high-level planning and the importance of political will, inter-agency coordination, and monitoring progress on sustainability goals.
- **Croatia:** Industry-driven ESG initiatives can serve as models of stakeholder engagement. The Croatian Chamber of Commerce's development of an ESG self-assessment questionnaire, along with the Croatian Employers' Association offering ESG education services, exemplify how business associations are actively promoting ESG standards and training among companies. A curriculum module might have students use such questionnaires to assess a hypothetical company's ESG performance, teaching them how measurement tools and voluntary standards function. Croatia's experience shows the value of cross-sector collaboration (government, chambers, and firms) in improving sustainability practices, an approach that can be emulated regionally.
- **Slovenia:** As a regional leader, Slovenia provides advanced cases of ESG integration. Leading logistics companies like **Luka Koper (Port of Koper)** and Pošta Slovenije have made significant strides through green initiatives from green port infrastructure to fleet electrification setting industry benchmarks for Southeast Europe. Including a Slovenian case study enables learners to explore best-in-class scenarios: for instance, how robust EU-aligned regulation and corporate commitment resulted in measurable reductions in emissions or waste. Such examples can inspire discussions on transferring best practices to other contexts, while acknowledging differences in resources and regulatory environments.

By embedding these and similar real-world case studies, the curriculum remains **contextually relevant** and engaging. Students and trainees will better grasp ESG concepts when they see neighbors in the Western Balkans tackling familiar challenges whether it's a city grappling with traffic pollution or a company trying to meet new EU reporting rules. The cases should be used in exercises, group projects, and problem-based learning scenarios (e.g. "How would you advise City X to implement a green logistics plan given budget constraints?"). This approach ensures that upon completing the program, participants can readily apply lessons learned to their own work environments, having already examined analogous situations in the classroom.

Fostering Regional Collaboration and Knowledge Sharing



Leverage regional networks for curriculum development and delivery: The multi-country analysis strongly indicates that **ongoing collaboration among Western Balkan stakeholders is crucial** for elevating ESG skills and standards. Given that transport and logistics chains cross national borders, a coordinated approach to ESG training will create synergies and consistency. One recommendation is to establish a **regional consortium or working group** of VET institutions, ministries, industry representatives, and experts to jointly develop and update the ESG curriculum. The SEE-GL project itself provides a foundation for this consortium; as an Erasmus+ partnership, it demonstrates how pooling expertise from EU member states (e.g. Slovenia, Croatia) and Western Balkan partners can produce shared resources. Such a group can continue beyond the life of the project to maintain the curriculum's relevance, harmonize it with new EU ESG directives, and avoid duplication of efforts in each country. Notably, *survey respondents across the region have called for clearer guidelines, government incentives, and above all better access to training to support ESG integration*. A collaborative regional effort can respond to this demand by creating common training modules and certification schemes that are recognized across borders, thus efficiently reaching a wider audience.

Harmonize standards and share best practices: To foster knowledge sharing, the curriculum initiative should align with broader regional frameworks. Existing platforms like the EU's **Transport Community Treaty** (which brings together Western Balkan transport ministries) and **CEFTA** can be enlisted to promote unified ESG guidelines and disseminate training outcomes. For example, the Transport Community could host annual workshops or an online repository where VET educators exchange teaching materials and case studies, ensuring that a lesson learned in one country (say, a successful green logistics pilot in Slovenia or a new safety protocol in Croatia) is communicated to others. The research suggests that harmonizing ESG standards such as adopting similar environmental reporting requirements or fuel efficiency norms would "ease compliance burdens and raise the baseline for all" in the region. Education plays a key role in this harmonization: if VET programs across Southeast Europe teach to comparable learning outcomes on ESG, companies operating in multiple countries will encounter a more consistent skill set and understanding among employees. Therefore, these recommendations include working toward a **regional ESG competency framework** for the logistics sector (potentially endorsed by ministries or the Transport Community), which VET curricula in each country can adopt. This could involve jointly defining core competencies (e.g. calculating carbon footprint, conducting social impact assessments, ensuring governance and ethics in supply chains) and developing standardized course modules or e-learning content that can be localized as needed.

Facilitate continuous stakeholder engagement: Finally, building a culture of collaboration requires institutionalized channels for knowledge exchange. Each country's stakeholders vocational colleges, training centers, logistics associations, and policymakers should be actively involved in reviewing and refining the curriculum as it evolves. Regular regional conferences or virtual seminars on "ESG in Transport and Logistics" could be organized (potentially under the auspices of an EU-funded platform or the **Erasmus+ community of practice**), bringing instructors and industry experts together to share updates, new case studies, and pedagogical strategies. The creation of **ESG learning hubs** in the Western Balkans, as envisaged by the SEE-GL project, will support this goal by acting as focal points where resources are pooled and expertise



is exchanged. Over time, these networks will nurture a shared ESG culture across the region, helping less-developed contexts catch up by learning from pioneers. In summary, an ethos of partnership “learning from each other’s successes,” as the comparative analysis puts it should inform not only the content of the curriculum (by featuring regional success stories) but also its implementation (through ongoing cross-border cooperation in teaching and training).

Next Steps: From Pilot to Scaled Implementation

To translate the above recommendations into action, the following short-term and long-term steps are proposed, charting a path from finalizing research to full program rollout:

Short-Term (next 6–12 months):

- **Finalize and disseminate research outputs:** Publish the completed analysis of ESG industry standards and practices (due by mid-2025) and share key findings with all stakeholders (esg-logistic.eu). These findings will validate the curriculum focus areas with evidence. Organize stakeholder workshops or roundtables in each country to present the research results and gather feedback this will ensure buy-in and that the curriculum addresses real needs as identified by industry and policy leaders.
- **Design and validate pilot curriculum:** Convene curriculum design experts from partner VET institutions and universities (e.g. University of Sarajevo, University of Zagreb, etc.) to develop a pilot ESG module or course series, drawing on the research insights and case studies above. This should include drafting learning outcomes, lesson plans, and materials (potentially in multiple languages). Before full implementation, conduct a peer review or **stakeholder validation** of the pilot content for instance, have ministry officials, company HR trainers, and civil society experts review the curriculum outline to ensure relevance and accuracy. Adjust the content based on this feedback, and seek any necessary accreditation or approval for the pilot course through national education authorities.
- **Train trainers and launch a pilot offering:** Identify a first cohort of instructors (from VET schools, polytechnics, or private training centers) and provide them with a short preparatory training on the ESG curriculum content and active learning methodologies. With trained instructors in place, roll out the pilot course in a controlled setting for example, as a continuing education program for a small group of logistics company managers, or as an elective in a partner vocational college. This pilot implementation (possibly one per country or a joint regional pilot) will serve as a proof of concept to refine the curriculum. Collect data on learner feedback and learning outcomes to inform subsequent improvements.

Long-Term (1–3 years):

- **Full integration into VET programs:** Based on pilot success, work with educational authorities to integrate the ESG curriculum into standard VET offerings and lifelong learning programs across the region. This could mean establishing a formal **ESG in Transport and Logistics** certificate or diploma that VET institutions in multiple countries offer, or embedding ESG modules within existing logistics and transport qualifications. The aim is to institutionalize the



curriculum so that it becomes a regular part of skills development for new entrants and existing workers alike. Monitoring and evaluation frameworks should be set up to track the impact on learners (e.g. improved ESG competencies, career outcomes) and on industry (e.g. increased adoption of ESG practices in companies).

- **Scaling through regional and EU support:** Leverage funding and partnerships to expand the reach of the curriculum. An Erasmus+ follow-up project or other EU funding (such as the Instrument for Pre-Accession or Green Transition initiatives) can be pursued to scale up training delivery, develop multilingual e-learning content, and extend the program to more institutions or additional countries. For example, a **regional center of excellence for ESG training** could be established, coordinating curriculum updates and offering advanced trainer training. EU platforms like the European Training Foundation (ETF) and the **Transport Community** can be engaged for technical support and to align the curriculum with European qualifications frameworks. The long-term vision is to create a sustainable network of ESG education in Southeast Europe that continuously updates itself through research and cooperation, ensuring longevity beyond the initial project.
- **Continuous collaboration and improvement:** Maintain the regional consortium or network of stakeholders to oversee the curriculum's evolution. Through annual reviews, the curriculum can be updated in line with new ESG regulations, technological innovations (e.g. logistics digitalization), and feedback from employers and alumni. Knowledge-sharing activities – such as an annual “Western Balkans ESG in Logistics Forum” – will keep stakeholders connected and committed. Over time, this collaborative approach will solidify a community of practice around ESG in transport and logistics. It will also help align regional practices with EU standards, as countries prepare for EU accession or deepen their compliance with EU sustainability directives.

These recommendations chart a comprehensive approach to developing an ESG-focused curriculum that is research-informed, contextually relevant, and collaboratively implemented. By grounding educational content in the realities of Bosnia and Herzegovina, Croatia, Kosovo, Montenegro, and Slovenia, and by mobilizing a network of regional actors, the proposed curriculum will equip current and future logistics professionals with the competencies to drive sustainable change. Such capacity-building is essential for the Western Balkans' transport and logistics sector to advance ESG performance, enhance cross-border cooperation, and meet the expectations of a greener European economy in the years to come.



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