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Trade Barriers and Exports between Western Balkan Countries

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Abstract

The aim of the paper is to identify the trade barriers imposed by the Western Balkan countries. All barriers, whether tariff or non-tariff, undoubtedly impede the normal development of trade between countries. Therefore, the paper examines merchandise trade patterns in the Western Balkan region and tries to identify the main drivers of and obstacles to intra-regional trade. Intra-regional trade comes second in importance, after trade with the European Union (EU); it underperformed and was in decline in the last few years. In the region with political challenges as the Western Balkans, non-tariff barriers significantly reduce trade exchanges between the countries in this region. Currently, the trade and political disputes (tax rate 100%) between Kosovo and Serbia showed that the imposed tariffs in trade created a political reaction between the countries, interrupting the dialogue between these countries. The originality and value of the paper are reflected in its dealing with such topics as trade barriers, genesis in ethnic and political disputes that are prominent in the Balkan region.

Keywords: trade barriers, Western Balkan Countries, exports, intra-regional trade

Introduction

Economic transition in the Western Balkans was characterised by the liberalisation of trade and capital flows, which opened up domestic markets to foreign competition. It was also characterised by the elimination of trade barriers. This transition began later in the Western Balkans than in Central Europe and the Baltics. The delay occurred in the 1990s, when the breakup of the Socialist Federal Republic of Yugoslavia (SFRY) triggered prolonged and multi-focal armed conflicts, sharp declines in economic performance, the application of international sanctions and the insurgence of intra-regional physical and non-physical barriers to trade and economic cooperation (Organisation for Economic Co-operation and Development (OECD), 2019, p. 13).

After the ethnic and political crises in this region, regional trade is thought to be a driving force for cooperation, development and social and economic emancipation of the nationalities of this region. Therefore, even in the Balkan countries, exports are considered as key factor of economic development and serve as indicators of macroeconomic stability. In order to maximise exports, alliances

have been established and agreements have been signed around the world aimed at eliminating restrictive trade barriers. But even after agreements have been reached to lift trade restrictions, many countries, through additional conditions that seek to be met by other countries, mainly in goods, significantly impede the entry of foreign goods into the domestic market. These agreements may contain provisions that indirectly entitle states to restrict trade in certain cases, which are considered exceptional, which may cause exports to other countries to be affected and thus impede free trade.

According to Kittova and Steinhauser (2018), the Western Balkans are considered North Macedonia, Albania, Kosovo, Bosnia and Herzegovina, Montenegro and Serbia. None of the Western Balkans can currently be considered a functioning market economy nor to have the capacity to cope with the competitive pressure and market forces in the global market. The best overall economic position among the Western Balkan countries belongs to North Macedonia and Montenegro. Conversely, countries assessed as the worst are Serbia, Kosovo and Bosnia and Herzegovina. Figure 1 shows the differences in the standard of living between the Western Balkan countries and European countries.

So, deepening cooperation and trade between Western Balkan countries would bring both economic and political benefits to the region by reducing trade barriers, increasing foreign investments, and improving the business

environment. The EU should strengthen the regional approach by giving all countries of the region tangible European commitment (Qorraj, 2018, p. 11). The free flow of capital, goods and services, would make Western Balkan countries more attractive for investment. These countries individually are small but collectively are a market of 20 million people. Integration in the EU would break down the regional barriers that hold these countries back from shared prosperity.

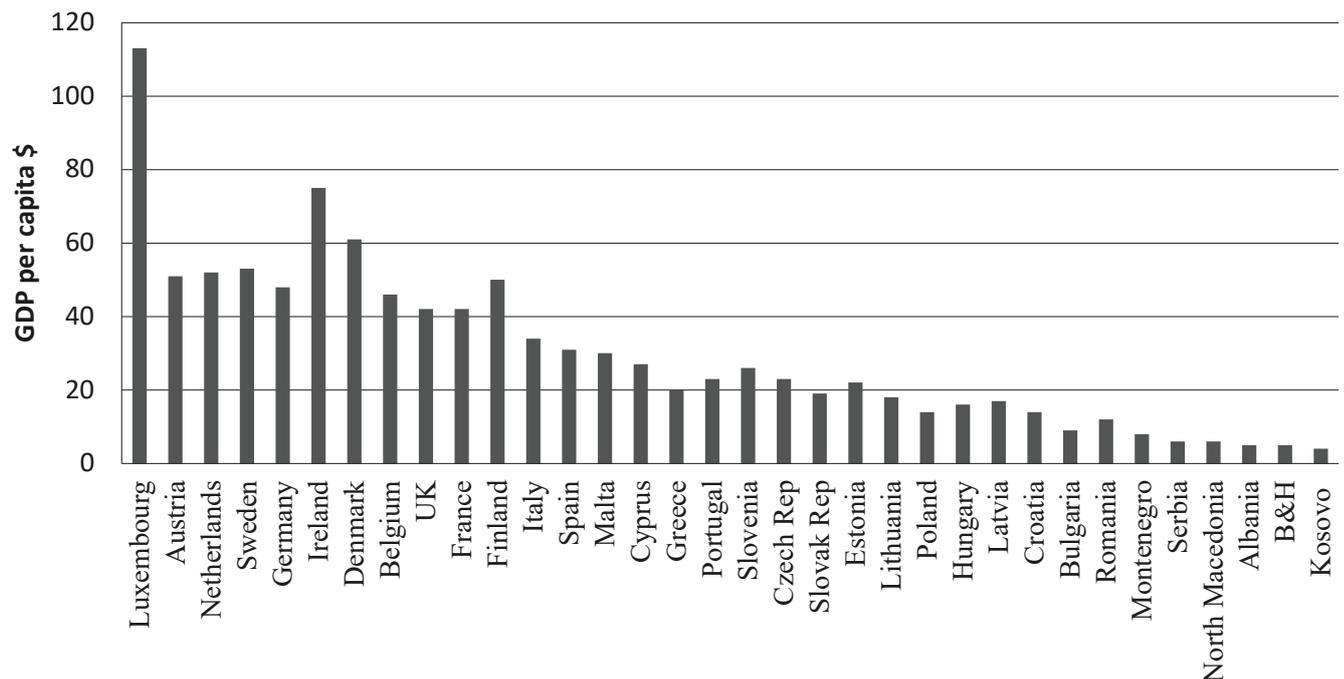
The research questions are:

1. Do the trade barriers in the Western Balkans have a political background?
2. Did intra-regional trade leads to higher trade integration of Western Balkan countries?
3. Did CEFTA and the Stabilisation and Association Agreement affect the elimination of barriers in the Western Balkan countries?

Methodology

This paper will use secondary data from official sources, research reports of local and international institutions, scientific papers as well as literature related to trade liberalization, the nature of trade barriers and their impact on the export of Western Balkan countries. So, through these data we will analyse the regional trade agreements such

Figure 1. Average GDP per capita in different groups of European countries



Source: International Monetary Fund, 2018

as CEFTA, part of which are Western Balkan countries, Stabilisation and Association Agreement (SAA), and their impact on the exports of this region. Our focus will be on the impact of trade barriers on exports, the effects of these agreements on these countries' exports and on economic development in general. Also using different figures, tables and graphs will reflect the level of exports and their impact on the economies of these countries.

Theoretical Background

There are varying reasons why countries engage in international trade. According to Krugman, Obstfeld and Melitz (2010), countries engage in international trade for two main reasons, each of which contributes to trade benefits. First, countries trade because they are different from each other, therefore countries can benefit from the differences they have. Second, countries trade to achieve economies of scale in production. In this way, countries tend to specialise in the production of such products where higher efficiency is achieved rather than trying to produce everything.

The analysis of trade, trade barriers, exports and benefits from trade agreements in the Western Balkan countries has been the focus of several authors who have attempted to draw conclusions on this issue. Although there are some empirical and theoretical evidence such as those presented by Miljovski and Uzunov (2002), European Bank for Reconstruction and Development (EBRD, 2003), Kernohan (2006), World Bank (2003), Qorraj (2010), Toševska-Trpčevska and Tevdovski (2014) and Qorraj and Jusufi (2018). There is still a marked lack of literature on the issue of costs and benefits of the Western Balkans from regional trade and trade barriers.

The evolution of efforts to facilitate trade in the Western Balkans began almost immediately after the signing of the Dayton Agreement in 1995. In 1996, the Southeast European Cooperation Initiative (SECI) was created as a modern version of a Marshall Plan for the Balkans. The primary aim of this initiative was to bring all Balkan countries to a mutual cooperation. After 2000¹, the political orientation of the Western Balkan countries had undergone a major change. In 2007 Bulgaria and Romania became EU members. In 2013, Croatia joined the EU.

In June 2012, Montenegro began EU membership negotiations. North Macedonia, Montenegro and Serbia are EU candidates, while Kosovo has a special international status because of Serbia's opposition to recognising its independence (United States Agency for International Development (USAID), 2016, 9). In 2006, the Western Balkan economies have embarked on liberalising regional trade within the Central European Free Trade Agreement (CEFTA). There are still cases, sometimes even isolated, where the business community from CEFTA members face direct or indirect barriers to trade. Although agreements do exist, it is worth noting that mutual recognition of certificates and test reports is lacking in the region. Mutual recognition agreements have not been implemented due to some formal reasons, as signatory countries do not exchange labs, but other problems are more realistic, for example, changes in testing requirements (Ministry of Trade and Industry (MTI), 2018, 3).

Tankosić et al (2011) explored the possibility of preparing Western Balkan countries for the EU market through regional trade integration. CEFTA and the SAA have promoted free trade but have not been the solution to maximise the region's trade potential. Prior to the creation of CEFTA 2006, the EU applied the Autonomous Trade Preferences to the Western Balkan countries in order to facilitate the export of these countries to the EU. As a result of free access to the EU market, countries in this region have been able to significantly increase exports of all product groups (Ognjenović and Branković, 2011, p. 192).

Trivić and Klimczak (2015) came to the conclusion pointing out the importance of communication in Western Balkan countries on trade issues, whether it is a direct opportunity to understand one another in terms of language or an intercultural dialogue focusing on improving tolerance towards the beliefs of to the other side. They suggest the use of all measures to work on regional dialogue that will promote understanding, multilateral tolerance and the reduction of formal and informal barriers of trade in the region.

Almost the same results were given by Kucharčuková, Babecký and Raiser (2010), who concluded that the poor quality of institutions in many Western Balkan countries is the major barrier to greater trade integration of this region. According to Xhelili-Krasniqi and Mustafa-Topxhiu (2017), Western Balkan countries trade more with European Union than between themselves. More intensive trade between the Balkan countries would give the Balkan countries a chance to export the goods of high economic and technological level to less competitive markets. If the Western Balkan countries adopt export-led strategy of small developed countries, then current deficits in the balance of payment and external debts should be overcome in the long-term.

¹ The countries that were classified as Western Balkan countries before 2000 were Albania, Bulgaria, Romania and the countries of the former Yugoslavia (Slovenia, Croatia, Serbia and Montenegro including Kosovo, FYR Macedonia, and Bosnia & Herzegovina).

Trade Barriers between the Western Balkan Countries

In this section we will chronologically examine the trade barriers between the Western Balkan countries. All six countries have committed to deepening their collaboration within the current Central European Free Trade Agreement (CEFTA) to the point where goods, services, investments and skilled people can move freely within the region without tariffs, quotas or other unnecessary non-tariff, and other barriers (Sanfey & Milatovic, 2018, p. 7).

However, the placement of barriers within the CEFTA block is made possible because of the flexibility existing in the CEFTA agreement to do so, which in turn impedes genuine free trade. Article 23 of the CEFTA agreement allows safeguards from one CEFTA member state to be taken against another member in the event that as stated in this article “the high amount of imports of a product which causes serious harm to the manufacturer of the product. The importing country or if this high amount of imports causes serious impediments to any particular sector of the economy of the importing country that may harm the economic situation” (CEFTA Agreement, 2006, p. 18).

The CEFTA, similar to other free trade agreements, provides for the possibility of introducing measures or barriers aiming at the protection of the internal economy, production and commercial interests. It specifies in which cases, under which conditions and following which procedure such measures can be taken or eliminated. During the period 2008-2012 there have been many cases, especially with Kosovo, when different countries have applied different barriers, both tariff and non-tariff, which have not necessarily been in any respect inconsistent with the CEFTA Agreement (Kosovar Institute for Policy Research and Development (KIPRED), 2013, p. 52).

In addition to the CEFTA agreement, the Western Balkan countries are part of the Stabilisation and Association Agreement (SAA). This agreement aims to eliminate trade barriers and free movement of goods and capital between the EU and these countries. The SAA's implementation has brought negative consequences due to the opening of the domestic market as well as from the increased EU market competition. In this context, more significant and with more detrimental influence on trade are the various non-trade barriers stemming from the SAA, such as the enterprise reconstruction, social programmes and their financial implications, quality and ecological standards and their adoption costs and high unemployment. Overcoming all of these barriers is a crucial goal for each partner country in order to fully grasp the benefits in the agreement (Group for Legal and Policy Studies (GLPS), 2018, p. 27–28).

Trade Barriers between Serbia, Bosnia and Herzegovina and Kosovo

Serbia and Bosnia and Herzegovina had blocked Kosovo's exports to these countries as well as transit of goods from Kosovo through these two countries starting in December 2008, when Kosovo changed its customs stamps from “UNMIK Customs” to “Kosovo Customs”². These two countries do not recognise Kosovo as an independent state. Also do not even recognise Kosovo's customs stamps. These countries' blockade on Kosovar exports has had a major impact on reducing Kosovo's exports.

Kosovo waited for about 3 years for Serbia and Bosnia and Herzegovina to remove the blockade, and as a result of the latter's unchanging stance, Kosovo's Ministry of Trade and Industry (MTI) decided to apply mutual barriers to these two countries starting July 20, 2011. Kosovo's reciprocal action on Serbian goods was a pressure therefore Serbia accepted the inscription on the customs stamps as “Kosovo Customs” on September 2, 2011. The reciprocity measure by Kosovo was withdrawn on September 16, 2011 (Kosovar Institute for Policy Research and Development (KIPRED), 2013, p. 53).

In early November 2018, the Government of Kosovo introduced a 10% tariff on imports from Serbia and Bosnia and Herzegovina in retaliation to, what was then argued, the direct assault of these countries on the sovereignty of Kosovo. The measure followed extensive lobbying efforts by Serbia to prevent Kosovo's membership in UNESCO and Interpol. Moreover, the withdrawal of a number of recognitions from countries that have already recognised Kosovo's independence seems to have had a bearing on the decision by Kosovo's authorities. Apart from political reasons, the Kosovo's institutions argued also that the imposition of the import tariff is also a response to barriers Kosovo exporters have long been facing in these two countries, largely of non-tariff nature. Kosovo's authorities did not back down. Moreover, they went even further, increasing the tax rate to 100% (Gashi & Berisha 2019, p. 4).

Serbia is characterised mostly in almost all sectors and in all categories, for the imposition of trade barriers on Kosovo companies, followed by Albania. Since 2008, Kosovo and Serbia have had a tense trade and political relationship. Therefore, due to Serbia's non-recognition of the state of Kosovo, the trade barriers between Kosovo and Serbia are more political than economic in nature (GAP Institute, 2019, p. 20). The Kosovar exporters are obliged by the Serbian

² On 17 February 2008, Kosovo declared its independence from Serbia. As a result, on 11 November 2008, formerly United Nations Mission in Kosovo (UNMIK) Customs Services was transformed to Kosovo Customs.

authorities, respectively the food and veterinary authorities, to wait for days with their barges, because the Serbian authorities do not recognise the analysis of the Kosovar exporters (MTI, 2018, p. 4).

Trade Barriers between Kosovo, Albania and North Macedonia

The other trade barrier case is the decision that the Ministry of Trade of Kosovo took on June 11, 2012, to impose a 35% tariff on the value of imported cement in Kosovo. Albania was the country most affected by this measure, as even the largest imports of cement came from Albania. The reason for imposing this tax was to decrease Kosovo's imports. Macedonia decided on July 24, 2012 to increase customs duties on water and welded pipes exported from Kosovo to Macedonia. On 1 August 2012, Kosovo eliminated import duty on cement on Albania and Macedonia. Also, North Macedonia eliminated import duties (Kosovar Institute for Policy Research and Development (KIPRED), 2013, p. 54)

Albania applies preferential import tariffs to the other members of CEFTA, EU member states and Turkey. Preferential and non-preferential origin applies to goods from certain countries. Preferential origin is provided for goods originating in those countries that have met certain criteria to benefit from preferential tariff treatment. On September 4, 2014 a Memorandum of Understanding and Cooperation was signed between the Chamber of Commerce and Industry of Albania and the Kosovo Chamber of Commerce. This Memorandum would enable closer cooperation between these two countries in order to eliminate trade barriers. Despite this, the Albanian authorities often apply reference prices to agricultural products of Kosovo origin. (Institute for Development Policy, 2015, p. 23).

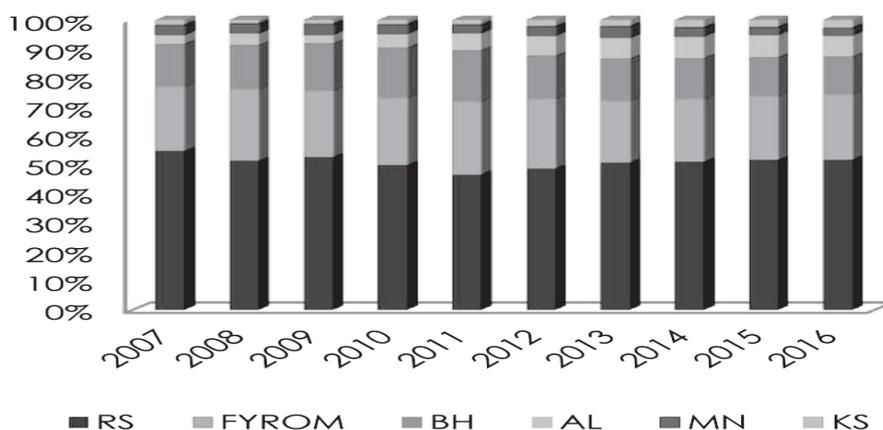
Despite these barriers, the institutions of the countries of this region have tried to support businesses in overcoming trade barriers. It should be noted that Kosovo businesses nowadays will find it much easier to address trade barriers during export, import or transit of their goods. This was facilitated by the Trade Department at the Ministry of Trade and Industry, which in cooperation with the EU project for Further Support to Trade Policy, has created a new web platform that will serve businesses in Kosovo to address through this instrument all trade barriers they face during export, import or transit of their goods in other countries, either at border crossing points or elsewhere (MTI, 2018, p. 14).

Intra-Regional Exports in the Western Balkans

Under the Stabilisation and Association Process, CEFTA 2006 and bilateral free trade agreements, Western Balkans countries have committed to deepening further their collaboration on areas such as trade liberalisation, electronic commerce and trade dispute settlements. Intra-regional trade is far less important at present. The EU is by far the region's most important trading partner. Two-thirds of the region's exports are with the EU. The share ranges from 80 % in North Macedonia to just 23 % in Kosovo (Levitin & Sanfey, 2018, p. 7).

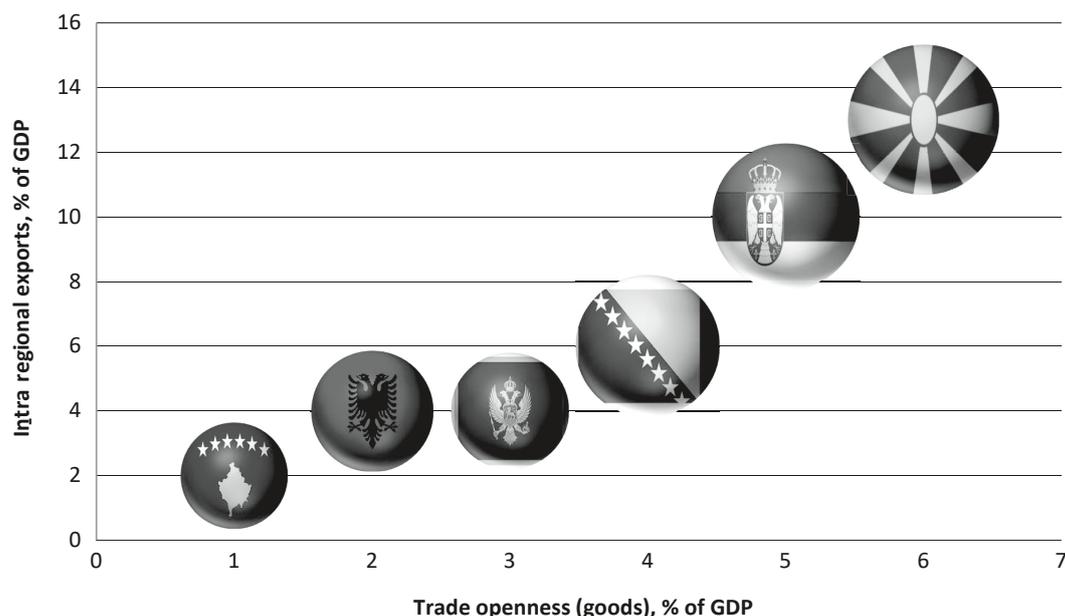
Even though there was a rapid increase of intra-regional trade, it did not lead to higher trade integration as compared to Central Eastern Europe countries. One of the reasons was that non-tariff barriers (e.g. sanitary and phytosanitary standards) appeared as obstacles. Also, the countries trade mainly goods, while integration of labour markets and increased labour mobility is still not in sight. This limits the expansion of intra-regional trade. Another thing is that there is variance of how much regional trade matters to individual countries.

Figure 2. Intra-regional exports among Western Balkan countries



Note: RS: Serbia, FYROM: North Macedonia, BH: Bosnia and Herzegovina, AL: Albania, MN: Montenegro, KS: Kosovo

Source: European Commission 2018, 11

Figure 3. Trade openness/exports to the region

Note: The flags represent the 6 countries of the Western Balkans, starting with Kosovo, Albania, Montenegro, Bosnia and Herzegovina, Serbia and North Macedonia.

Source: European Commission 2018, 11

Moldova has almost no trade and Albania has low trade with the region, while Kosovo's main exports are in the region (Balkans in Europe Policy Advisory Group, 2015, p. 10–11).

Another characteristic of intra-regional trade is that intra-regional exports in the Western Balkans are geographically concentrated and most of them originate from Serbia. As

can be seen from figure 2, in particular, in 2016, around half of all merchandise intra-regional exports originated from Serbia, while slightly more than a fifth came from North Macedonia. Both countries kept their share in total regional exports largely unchanged since 2007. Over the same period, Albania more than doubled its share of intra-regional exports. Kosovo also expanded its exports to the region,

Table 1. Western Balkan, Intra-Regional Trade, 2015 (million EUR and %)

COUNTRIES		Albania		Bosnia and Herzegovina		Kosovo		North Macedonia		Montenegro		Serbia		TOTAL	
		Imp	%	Imp	%	Imp	%	Imp	%	Imp	%	Imp	%	Exp	%
Albania	Exp			3	2%	134	63%	38	18%	25	12%	12	5%	214.3	100
	%			0%		34%		6%		3%		1%			
Bosnia and Herzegovina	Exp							48	4%	150	14%	409	37%	1096	100%
	%					0%		7%		16%		34%			
Kosovo	Exp	43	40%	3	3%			27	25%	17	16%	15	14%	107.4	100%
	%	16%						4%		2%		1%			
North Macedonia	Exp	56	10%	70	12%	174	29%			24	4%	195		590.2	100%
	%	21%		3%		44%				3%		16%			
Montenegro	Exp	15	8%	32	17%	21	12%	3	2%			80	43%	184.9	100%
	%	6%		1%		5%		0%				7%			
Serbia	Exp	96	4%	994	40%			454	18%	568	23%			2455.2	100%
	%	36%		43%		0%		67%		62%					0%
TOTAL	Imp	267		2322		399		674		912		1219		6735.6	
	%	100%		100%		100%		100%		100%		100%		100%	

Source: Pere and Ninka, 2017

although from a very low base. Exports from Montenegro and Bosnia and Herzegovina did not keep up pace and lost market share in the region.

Relative to the economic size of the exporting country, from figure 3 it can be seen that regional trade has the highest share in the most open economy in the region-North Macedonia, where exports to the region top 12% of GDP. It is followed by Serbia with around 10% of GDP and Bosnia and Herzegovina with close to 6% of GDP. Despite its rise, intra-regional exports have the lowest share in Kosovo at some 2% of GDP.

Table 1 is based on the volume of exports and imports of a country to other countries in the region, by also taking into account the fact that a country's export to another country can be considered as import of the second country to the first. The table is constructed in matrix form. Each of its cells provides the value of exports/imports between the two countries. If we read the table in rows, from left to right, columns are placed on a country's exports to other countries in the region.

For example, in line Albania (row two of the table), Albania's exports to other countries have been tiered. To the right of every value is given the weight of the total exports of this country to the total for the region. The amount of exports is presented in the last column. If we continue with the example of Albania, we see that the country exported goods worth 3 million Euros to Bosnia and Herzegovina, which make up 2% of Albania's exports to the Western Balkans region, amounting to 214 million Euros total. If we read the table under the columns, the values of imports of each country from the other countries of the region are set in each row and below each value in the same column, are these values in relation to the total imports of the country, expressed in percentages (Pere & Ninka, 2017, p. 73).

From the above theoretical and tabular data, it can be understood that trade liberalization in Western Balkan, although positively seen from a political perspective, doesn't facilitate the overall export performance to a significant extent in a long term. One can suspect, that far more important job should be done in the institutional field. A favourable macro environment should be created in order to enable producers to develop modern and internationally competitive technologies, thus building and extending production capacities of the countries of the Western Balkans (Klimczak, 2016, p. 57).

So, according to World Bank Group (2017) regional collaboration to reduce trade costs, improve the transparency of barriers and regulations, and increase market access for goods and services would make the Western Balkans a more

desirable trading partner to the rest of the world, as well as support integration efforts with the EU.

Conclusions

The main conclusion of the paper is that despite the achievements over the 20-year period, political, economic and social environments in the Western Balkan countries are still weak. Regional cooperation, especially intra-regional trade could be as complementary instruments to eliminate ethnic divisions and problems of a social and economic nature, which are accumulated over a very long period of time. But intra-regional trade has not led to higher integration between these countries.

Western Balkan countries have set tariff and non-tariff barriers within the CEFTA Block in order to protect their local products. As mentioned above, when countries impose restrictive barriers, trade declines. The tariff on imported cement from Kosovo, which was followed by customs measures imposed by North Macedonia on pipes, Kosovo's reciprocity with Serbia are examples of barriers that hinder regional trade. Therefore, despite the fact that these countries are part of the CEFTA and the SAA, it has not affected them not to set different barriers to each other.

With a major impact on Kosovo exports are the non-tariff barriers applied to Kosovo products, such as the barriers to Kosovo transit goods crossing into Serbia and the frequent change of documents required by the Government of Serbia. Also, the barriers imposed by Albanian authorities on products from other Western Balkan countries, which are related to the lack of export analysis, mainly on agricultural products. Most of these barriers between countries in this region are of a political nature. Problems with crossings and long waiting times at border crossings have a direct impact on the competitiveness of enterprises in this region. Hence, the private sector in this region faces many challenges.

The governments of the countries of this region must put aside the old animosities. It is recommended to create a friendlier climate, eliminate all trade and political barriers in order to encourage Foreign Direct Investment and economic development, which would increase export growth.

There are limitations of this paper, because there is insufficient data on the trade barriers of the countries of this region. Although there is a lack of data and statistics about the trade barriers with political background, this paper will contribute theoretically to the literature of the Intra-regional trade and Western Balkans. The paper will also offer knowledge and additional sources about regional cooperation, trade matters of this region and integration of the Western Balkans to the EU.

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Trgovinske ovire in izvoz med državami Zahodnega Balkana

Izvleček

Cilj tega članka je prepoznati trgovinske ovire, ki so jih uvedle države Zahodnega Balkana. Vse ovire, carinske ali necarinske, nedvomno ovirajo normalen razvoj trgovine med državami. Zaradi tega članek raziskuje blagovne trgovinske vzorce v regiji Zahodnega Balkana in poskuša prepoznati ključna gibalna in ovire v intraregionalni trgovini. Intraregionalna trgovina je druga po pomenu za trgovino z Evropsko unijo, v zadnjih letih je bila slaba in v upadu. V regiji s političnimi izzivi, kot je Zahodni Balkan, necarinske ovire znatno znižujejo trgovinsko menjavo med državami te regije. Trenutno so trgovinski in politični spori (davčna stopnja 100 %) med Kosovom in Srbijo pokazali, da so uvedene carine na področju trgovine ustvarile politično reakcijo in prekinile dialog med temi državami. Izvirnost in vrednost tega članka se kaže v obravnavi tematik, kot so trgovinske ovire, geneza ter etični in politični spori, ki so izstopajoči za regijo Balkana.

Ključne besede: trgovinske ovire, države Zahodnega Balkana, izvoz, intraregionalna trgovina