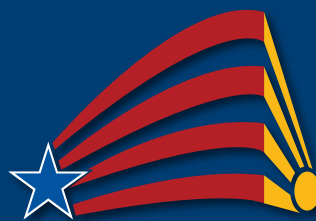


EMERGING MACEDONIA



The Magazine of the
American Chamber of
Commerce in Macedonia

Volume 1/2019

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Spotlight: Joining the European Market - Opportunities and Challenges

Low productivity and Labor
Shortage - Key Threats on
the Path to EU

EU Support for Private
Sector Readiness

The New IPR Challenge for
Macedonian Companies



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Dear members,

I am delighted to present to you a re-designed version of the AmCham Macedonia magazine under a new-old name – *Emerging Macedonia*. *Emerging Macedonia* was the original name of the magazine and we thought it was suitable to resurrect it now that Macedonia is on the road to NATO and EU accession. Moreover, we refreshed the design to reflect the position of the publication as the only business magazine in English on the Macedonian market. We hope you enjoy the new look – feedback is always welcome!

In terms of content, in this edition we are shining a spotlight on the long and arduous journey ahead of us as we embark on the path of joining the EU and its market of 500 million consumers. We look at the implications of such a merger, as well as how to make the best out of the new situation and where the obstacles and challenges may lay. We asked academics and researchers, as well as practitioners, what the private sector can expect when Macedonia joins the EU, and the most frequent answer we heard was – prepare well in advance and raise your standards of working. This edition of the magazine is a beginning of a longer and larger conversation about private sector readiness to join the EU market and we will continue to raise issues that affect the competitiveness of domestic companies as they prepare for EU integration.

We also introduced a new magazine section called Meet Our Members where we present outstanding but lesser-known members of AmCham, companies that set standards for excellence, innovation, and social responsibility. The first company to be highlighted in this section is the printing house Propoint, one of AmCham's newest members, a company that cares about quality, the environment, and creating opportunities for the less able. They have also taken over designing and printing our magazine and we are grateful for their efficiency and cooperation.

In the AmCham Events section you will find an overview of our holiday party, several member-to-member events focusing on a transfer of knowledge and experience, our signature Young Professionals Speed Networking events, as well as events with several visiting guest speakers – the AllWeb conference speakers and Yair Engel from Israel.

As we continue to focus on organizing events that matter to you, I'd like to encourage you to contact us with ideas, initiatives, and suggestions on topics that are of importance to your industry, company, and team. The Chamber can only remain relevant if its members are engaged, active, and committed.



Dijana Despodov
Executive Director

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Low Productivity and Labor Shortage – Key Threats on the Path to EU



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Membership in the European Union, from an economic point of view, has its benefits, but also challenges. The biggest benefits do not come with the accession to the European Union (EU), but from the membership process. The process itself means fulfilling certain criteria, values, and principles that are common to all member states of the European Union. These values and principles are a certain guarantee that the country can deal with the challenges, but also the requirements that the European Union has. Through the process of meeting these principles and criteria, countries with the aspiration for membership become more competitive, more organized, and build values on a higher level than the one they had before. The Macedonian economy is characterized as a small, open, and fragile, under the influence of political turbulence in the country and with unsatisfactory rule of law. Hence, the economic integration of the country entails a thorough reconstruction – a repair of the economy, full market openness, delegation of a significant part of the country's economic sovereignty to the EU collective institutions, and creation of economic policies as a result of joint and binding decisions.

Benefits from the membership are multiple, and all changes should lead to a better standard of living for citizens. Higher economic growth, higher growth in gross domestic product, higher investment, and lower unemployment are the main outputs expected from the accession to the European Union. But the key benefits are

the indirect benefits that need to change the 'economic matrix,' or the basis for creating these results, which include: institutional credibility and rule of law, increased competitiveness, access to market, increased efficiency, and better public services.

Benefits to the Private Sector

Institutional credibility and the rule of law are part of the foundation that is expected to be gained from EU membership. This is one of the key shortcomings of our economy, and perhaps a key factor for low growth in recent years. The stability of the regulations, the nonreligious application of laws, and certainty in economic policies increase the trust in institutions thus creating a positive economic climate for medium and long-term planning. In addition, the institutional credibility and stability of economic policies influence the optimism for investing in the country, both with domestic and foreign investors. Such changes should result in higher foreign investment in the country.

EU membership offers a variety of benefits for the business sector. In a research done by Finance Think on the topic - Bridging the Gaps and Using Potentials: Domestic Small and Medium Enterprises in the Supply Chain of Multinational Enterprises in the Country, the results show that the technological capacity of domestic companies is one of the key gaps for the cooperation of foreign investors in the country with domestic companies. This suggests

that domestic companies are not competitive enough. The EU integration process will enable higher competitiveness of the economy, mainly utilizing the benefits of knowledge transfer, technology transfer, fostering innovation, as well as research and development activities. The integration process itself enables access to funds that support these activities.

Access to the open market also increases opportunities for domestic companies. From this process, the most compelling, innovative, and fast-growing companies will reap the greatest benefits, making them competitive with their peers from EU countries. Hungary's experience has shown a rapid increase in trade in services and agricultural products after EU membership, while neighboring countries are mentioned as key partners.

Benefits to the Public Sector

In addition to the benefits for the private sector, the benefits of joining the EU are perceived in improving public services. Standardization of public services, higher quality, and efficiency are the expected results from the process of structural reforms of public services. Additionally, by joining the EU, the country is eligible for the use of infrastructure funds, which is an important aspect for fostering economic development. The focus and significance of EU transport infrastructure can be seen from the long-term investment plans. As part of the next long-term EU budget 2021-2027, the European Commission proposes a budget of 42.3 billion euros to support investments in European infrastructure projects through the reconstruction of the Connecting Europe Facility. This represents an increase of 47% compared to 2014-2020.

Challenges on the Road to EU

However, besides the benefits, EU membership has its own challenges. The two key deficiencies that the country faces at the moment are: low productivity, and lack of skills and labor shortages. These disadvantages are a key threat on the path to EU membership.

In the latest World Bank report, it was noted that the country has a low level of productivity



and no progress in this field. The top 10% of the most productive companies are more than seven times more productive than the lowest 10% of companies. For comparison, in America, the difference is two times. On the road to EU, companies will face greater competitiveness and need for productivity, and some of the companies will not “survive” this process. Joining the EU is a threat to the least-productive companies. Whether this threat can be overcome depends on domestic companies and on how much they can adapt, restructure, and take advantage of technological development opportunities.

In addition to the productivity of companies, the availability of skilled labor, human capital, and employee productivity is a second threat to the country. The average employee in the production and service sector in Europe is four times more productive than the average employee in Macedonia (World Bank, 2019). The business sector has been warning about the lack of skilled workforce for a long time. One of the obstacles to further attracting foreign investment and expanding the country's existing foreign investment is precisely the lack of workforce, low skills, and a long process of training at the workplace (Trajkovska and Petreski, 2018). Currently, the lack of skilled labor is evident in both quantity and quality. With EU membership, labor market mobility is much greater and an outflow of skilled labor should be expected. Hence, urgent reforms in this field are needed in order to minimize the negative consequences. ■

Joining the European Single Market - Opportunities and Challenges



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The basic idea behind the “European project” was economic cooperation that would help post-World War 2 countries recover, and establish closer ties in order to prevent war from happening again. What started as the European Coal and Steel Community, went on to become a free trade area, customs union, common (single) market and finally an economic and monetary union, with the ambition to reach the level of “ever-closer political union”. Throughout the process, most of the newly adopted EU rules, measures and court rulings were aimed at removing the obstacles to the free flow of goods, services, workers and capital. These actions responded to either identified weaknesses or evolutionary challenges that distorted the European market and in time led to the creation of the European Single Market (EU Member States, Norway, Switzerland, Iceland and Liechtenstein) as one of the greatest achievements of the European integration process and one of the biggest benefits for EU’s citizens and companies.

The European Single Market - Why is it Important for Us?

The Single Market offers businesses unlimited access to over 500 million consumers, which enables them to exploit economies of scale and leads to improved efficiency. It is designed to remove all non-tariff barriers, to promote trade and increase fair competition between companies, ultimately leading to greater choice

of goods and services, better quality, and lower prices for consumers. Competition and pressure from other markets encourages companies to restructure and reorganize in order to improve competitiveness and minimize costs. In addition, it facilitates trans-national joint ventures and technological alliances, accelerates the gains from trade and specialization between countries. In addition, the free movement of workers as one of the advantages of the Single Market aims to contribute to better and more efficient allocation of human resources and reducing the mismatch between labor demand and supply within the national labor markets. It will also have practical impact on cutting red-tape and facilitating procedures for Macedonian businesses wishing to operate abroad. Nevertheless, in order for companies and countries to benefit from the Single Market and not succumb to the more developed and more experienced competitors, they need to achieve a certain level of preparedness before Macedonia joins the EU. Previous enlargements have generated evidence on the impact of the Single Market on a number of outcomes (GDP per capita, consumption per capita, investment and employment). To this end further progress needs to be made, especially in areas such as the fight against the shadow economy, improvement of the business environment, contract enforcement, employability and employment, research and development, and digitalization. The last area increasingly gains importance on the EU agenda to the extent that

currently most actions in the legislation pipeline are aimed to complete the creation of the European Digital Single Market.

How Ready Are We to Become Part of the Single Market?



One of the basic EU accession criteria, defined in Copenhagen in 1993, is the existence of a “functioning market economy and the capacity to cope with competition and market forces in the EU”. According to the country report published by the Commission in April 2018, Macedonia is at a good level of preparation on its way to becoming a functioning market economy, but only moderately prepared to cope with competitive pressures and market forces within the EU. This in particular refers to the size of the companies and the size of distribution, as well as the market structure (the monopolistic position, as well as the openness of the economy in terms of the freedom of access by foreign firms to sell their products domestically). After the accession, national borders will no longer serve as effective barriers that safeguard and the market pressure will no longer be created by domestic companies only, but by international as well. The varying degrees of competitive pressure in the product and factor markets are expected to affect firm performance. How Macedonian firms will respond to changing competitive pressure will largely depend on the incentives and governance structure. Considering that most of the companies are small and micro family businesses, the efforts in the period of accession should be put on building their governance structure and response

mechanisms to the competitive pressures of the Single market.

The alignment with the EU acquis, or the set of EU regulations, directives, and other implementing acts which need to be transposed or implemented before the accession, implies profound legal and structural changes which will certainly have an impact for the business community and the entire society. They will probably also bring additional costs and may have redistributive effects. In order to mitigate possible negative influences and contribute to as smooth adjustments as possible, all the reforms need to be conducted in a transparent and inclusive manner, with the business community, social partners and civil society at the decision-making table.

Where is the Place of the Business Community in the EU Accession Process?

The business community and their representative organizations are important stakeholders during the accession process – both as an interested party that needs to be well informed and kept abreast of all the new developments and as a source of information regarding the current readiness of the domestic economy to join the EU. However, the government has not yet established a structure for EU negotiations that includes the business sector. In addition, efforts need to be put to strengthen companies’ and business associations’ capacities to be effectively included in the negotiations, i.e. to analyze the possible impact of the Single Market in order to design alternative scenarios and prepare. Hence, they need to be able to engage in various EU initiatives and programs, as to make use of the exchange, know-how transfer and absorb available funding. According to European Commission statistics, only 4 Macedonian entities – all of them organizations and none of them a company – have benefited from COSME (EU’s program for Competitiveness of Small and Medium Enterprises). Given that over 99 % of all companies in the country are SMEs, this fact is one indicator of the low level of awareness and readiness of Macedonian companies to make use of the potential gains that the EU puts at their disposal.

The role of the EU single market

2,6
%

GDP growth if the single market for services is fully implemented



2,77
million jobs

would be created by the further development of the EU single market



70
%

of the EU's GDP is created by the services sector



Sources: European Commission; Council of the European Union

What Are we Actually Negotiating?

The notion of accession negotiations can often be misleading, especially when it comes to the Single Market. The adoption of and alignment with the entire EU acquis is not a subject of any negotiation process. What can be negotiated are the deadlines and some aspects regarding the manner to achieve some of the objectives prescribed in some directives. While certain transition periods are allowed for issues that have only domestic implications (although more and more rare with each enlargement), no such transition is allowed when it comes to the Single Market. A country that is joining the EU needs to have all the preconditions in place before the accession date.

Moreover, most of the chapters that are to be negotiated in the framework of the accession process are to a certain extent related to the Single Market. They either directly facilitate and underpin its establishment (like the chapters related to the free movement of goods/workers/capital, freedom of establishment and provision of services, enterprise and industrial policy, economic and monetary policy, competition

policy, company law etc.), or affect in some way the operations of domestic businesses (like the chapters on energy, environment, agriculture, food safety etc.). The fulfillment of the political criteria also has an impact on the functioning of the Single Market because it provides the much needed political stability and legal certainty for economic operators, helps to establish a level-playing field by reducing the informal economy, and contributes to eliminating corruptive practices.

Finally, joining the Single Market goes hand in hand with the transfer of many competences in the area of economic policy from the national to the EU level. This means that once Macedonia joins the EU, it will not be fully autonomous to make decisions related to different economic issues, but will need to comply with binding decisions adopted by the European institutions. That makes it all the more important to advocate for a serious, transparent and inclusive EU accession process that will create favorable conditions for Macedonian companies and citizens to reap the benefits, and not "suffer the consequences" of the Single Market. ■



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EU Support for Private Sector Readiness



*Freek Janmaat,
Head of the Section for Economic Development, Institution Building and Cross Border Cooperation,
EU Delegation in Skopje*

As we all know, 2019 will be an important year for North Macedonia. In January, the Parliament endorsed the changes to the constitution following the agreement with Greece on the name. As the Greek Parliament also supported the agreement, the start of EU accession negotiations could take place already this year. For this to happen, the European Council (consisting of all Member States of the EU) will have to give its green light, looking also at the reforms and policies in key areas such as the rule of law and public administration. What does this European Integration process entail for companies, what are the advantages and challenges?

The actual process will be gradual, meaning that companies will not immediately notice big differences with the start of accession negotiations. Already since 2004, Macedonian companies can freely export many products to the EU thanks to the Stabilisation and Association Agreement (SAA). This is the free trade agreement between the country and the EU. Although it is understandable that much attention in the public debate is paid to the opening of accession negotiations, it is perhaps less well known, and sometimes taken for granted, what substantial advantages the SAA already brings to the country and its private sector.

Stabilization and Association Agreement

The SAA goes much beyond a regular free trade agreement. Besides tariff reduction and elimination, it ensures gradual, legally binding

alignment with EU standards and policies in important trade related areas such as competition, intellectual property rights, public procurement, consumer protection, etc. This in turn facilitates domestic companies' access to the EU's internal market. Vice versa, the gradual process of the local market opening to EU companies led to more competition in the country. This benefitted citizens, but also strengthened the competitiveness of firms. Over the years, thanks to the SAA, domestic companies have proved to be able to find their way to the EU's market and substantially increased sales of local goods and services, illustrated by the fact that around 70% of the country's exports now go to the EU. The ability to freely export to a market of half a billion people has also ensured substantial foreign direct investment into the country, both from the EU and other countries, with positive spill over effects on the activities of local firms and employment.

On the 4th of December last year, the second phase of the SAA entered into force. This means that domestic legislation will be further



harmonised with EU rules and regulations in areas such as rights of establishment of companies, provision of services, liberalisation of payments and movement of capital. This makes it easier for Macedonian companies to register subsidiaries and provide services in the EU. It also facilitates the acquirement of real estate in the EU, as well as the opening of bank accounts in EU Member States, both for citizens and companies.

Contrary to the SAA, the accession negotiations do not have a legally binding character. The speed with which they can be concluded depends on the reforms pace of the country itself. For most chapters, there will be so called opening and closing benchmarks for every area (or 'chapter') of the EU legislative framework (the so called "acquis communautaire"). Opening benchmarks will usually take the form of legislation and/or strategies and action plans having to be in place for a certain chapter. Closing benchmarks will likely take the form of a 'track record', showing that the country is able to implement the transposed EU legislation.

To illustrate this, let's take the example of free movement of goods, one of the cornerstones of the EU's internal market. First, legislation in this area will have to be aligned with EU rules and regulations. Then, to close this chapter, the

authorities of North Macedonia will have to prove to be able to implement this legislation. For this, the local institutions will have to show to be up to the task of adopting EU product standards and of market surveillance. This in turn will facilitate exports of locally produced goods to the EU. Similar processes will take place in other important trade related areas of EU legislation, such as customs, energy, transport and financial services.

The main challenges in this process for local and foreign companies active in the country relate to the requirement to produce high quality goods, complying with the relevant product safety, health and environmental standards, while remaining competitive on the EU and domestic market. The degree to which the local economy is already integrated into the EU in terms of exports in this respect sends a hopeful signal for the future.



EU Support Mechanisms for the Private Sector

The Macedonian private sector can furthermore count on substantial EU support in this process. Several EU programmes primarily meant for EU Member States themselves are also open for Candidate Member States to benefit from. This concerns for example the programme supporting the competitiveness of small and medium sized enterprises (called COSME) and the Horizon programme, stimulating research and development in both the public and private sector.

Through its Instrument for Pre-Accession (IPA), the EU in addition has an annual envelop of around 90 million available in grants, specifically earmarked for the country. A large part of this benefits the private sector through projects of a wide-ranging nature, from the development of entrepreneurship, joint customs facilities with neighbouring countries to infrastructural projects in the area of energy and transport. The private sector can furthermore profit from the recent 100 million lending operation of the European Bank for Investment, through which loans from the financial sector to small and medium sized enterprises are subsidised.

In addition to support measures directly aimed at the development of the private sector, the EU also provides guidance for the country's macro/fiscal policy and for its structural reforms. A stable macro-economic environment and solid public finances are important prerequisites for any country's business environment. Very similar to the existing practice with Member States, the European Commission assesses the so-called Economic Reform Programmes of candidate countries in which they outline their macro policies and structural reforms for the next three years. The European Council then adopts policy recommendations, jointly with the Governments of the candidates. This way the country benefits from policy advice based on best practice in the EU. This also concerns issues relevant for private sector development, such as the unfair competition that registered firms face from the informal sector, the enforcement of business contracts, and how to deal with the mismatch

between what skills companies are looking for in the recruitment of new employees and what new entrants into the labour market are equipped with following their completed education.

To end, one can conclude that the EU accession process offers both challenges and advantages to the private sector. The main challenge for companies will be to develop the capacity to face the competitive pressure on the EU's internal market. It is therefore important to look ahead and to anticipate new developments and consumers' preferences. At the same time, EU accession offers many opportunities for domestic and foreign companies located in North Macedonia. Partly thanks to their competitive advantage on labour costs, many firms have already proved to be able to operate in the EU and this will only be facilitated by the country's accession to the Union. In addition, when considering the positive impact previous rounds of EU enlargement had on the development of the private sector of acceding countries, it is realistic to expect similar possibilities for both local and international companies active in the country.

More information about EU support programs for the private sector can be found on the web site of the EU Delegation. ■





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The New IPR Challenge for Macedonian Companies



*Valentin Pepeljugoski, Ph.D.,
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Law Office Pepeljugoski*

The start of the negotiations for accession in the EU will bring new challenge to the Macedonian enterprises regarding the protection of the intellectual property rights (IPRs). Namely, in the period before and after becoming member to the World Trade Organization (WTO), the eyes of the foreign companies, experts, and institutions were intensively focused on the IPRs regime, especially our weakest link, the enforcement. In the period to come we will be witnessing even more extensive screening of the protection of the IPRs. In that respect, beside the regulation, the relevant directorates and commissionaires in the EU will be concentrated towards the capacities of the authorized institutions for enforcement of the regulations, especially the inspectorate, the public prosecutors, and the judiciary.

As far as the legislation is concerned, we do not expect major activities in the fields of patent, trademarks, industrial designs, and the geographical indications. However, major amendment or supplement will be assumed in the field of copyright law, especially in the field of media rights and collective enforcement of rights. The latter will presumably cause problems, due to the fact that the already announced amendments in the Law on copyright and related rights are already one year overdue.

Dynamic Changes in Europe's IPR Legislation

It is important to note that the legislation activity regarding the IPRs in the EU is very dynamic and current, due to the fact that it is an area

that undergoes constant changes caused by the development of new technologies. Currently, we are witnessing the passing of the legislation for Unitary Patent and Unified Patent Court. On the other hand, in the scope of the European patent organization, there are organizational and physical changes, with the division of the European patent office and the Board of Appeal. The strengthening of the role of the Board of Appeal requires reform towards strengthening its managing autonomy, the perception of its independence, and the new efficiency in the performance. In the trademark area the changes of the Community Trademark Regulation brought changes in the graphical representation, the new certificated trademarks of the EU were introduced and also certain aspects of the recognition procedure were adjusted (priority request, distinctiveness request as subsidiary, appeal/cancellation procedure, online communication, languages and translation).

The Unitary Patent will be available for each individual, legal or physical person regardless if it originates from Europe or not and regardless of whether its country of origin participates in the scheme or not. The benefit of the Unitary European System is great for the inventor, but also for the holders of patents, researchers, universities, and SMEs, but mostly for the pharmaceutical industry which is one of the major consumers of the global and regional IPRs protection systems. The Decisions of the European Patent Office in respect of the Unitary Patent can be appealed in front of the Unified

Patent Court. The Unitary Patent System together with the centralized patent system for judiciary protection (the establishment of the European patent Court in Paris and the special divisions in Munich and London) which was expected to start with the performance in the first half of 2018 will simplify the patent protection procedure and will unify the practice. In such manner the unjustified national protectionism will be eliminated in the field of patents. The arbitration and mediation center is headquartered in Ljubljana and Lisbon.

Challenges and Concerns for Macedonian Companies

The “homework” in the field of IPRs protection may not be that extensive compared with their activities on the EU market. Namely, the IPRs regime in the scope of the EU is regulated by a large number of regulations, directives, and other legal acts that need to be followed. It is indisputable that, with the exception of a few larger Macedonian companies, the others do not pay much attention to IPRs and their protection. We can easily conclude that the Macedonian companies are not interested in protecting their patents, trademarks, and industrial design with the local IP Office and even less in the EU member states. This is primarily result of the lack of knowledge of the real value and also added value of the IPRs to the goods/services the company offers. But, this problem can become even bigger for Macedonian companies due to the fact that their trademarks and/or industrial designs do not enjoy protection in the EU member states. Even though since independence until now our country has ratified almost all international conventions in the field of IPR (Patent Cooperation Treaty, European Patent Convention, Madrid Agreement and the Protocol to the Madrid Agreement for international trademark registration, Hague Agreement etc.), which eased the process of international registration of IPRs, the number of applications, and respectively registrations is very low. Our research of the available data dated February 27, 2019 show that 66.243 trademarks were registered and 691 applications are in the process of approval through the Madrid system in our country. The majority of these trademarks



derive from Germany (17.222), France (10.002), Switzerland (9.592), Italy (8.451) and the Netherlands (6.295). Domestic companies, on the other hand, have only registered 346 trademarks through this system, whereas Croatia has 1.896 and Slovenia 2.957. Also concerning is that Macedonian companies have an insignificant number of applications and registrations with the European Intellectual Property Office (EUIPO) in Alicante, Spain. Only 44 trademarks have been submitted there, whereas Greek companies have 5994 trademarks. Our companies will have to change this practice if they to avoid a situation where their product is “legally removed” from the EU market, due to the fact that EU companies with registered trademarks have priority before our companies, regardless of the fact that Macedonian companies have national registrations in the Macedonian State Office for Industrial property.

We would like to emphasize that when Slovenia and Croatia became EU member states they had to recognize the priority of the EU member states. In order to avoid this situation Macedonian companies will have to immediately (although it may even be a little late now) reconsider their approach to the European market in the area of IPR protection. When we take into account the fact that globally, and in certain aspects also regionally, there are attempts to bring back protectionism and a constant trend in the enforcement of IPRs protection by the introduction of high standards in different areas. In such manner there is an efficient mechanism for the removal of companies from certain markets. Therefore, I sincerely believe that our companies will not allow their lack of management, education, and vision to be the reason for losing the EU market. ■

EU Market - Opportunity to Earn, Opportunity to Learn!



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Manager of Export Department
Vitaminka*

In the last decades, there is evidence of increasingly prominent trends in the world of business globalization, regional integration, reducing of barriers, workforce fluctuations and uniform regulations. As a consequence of these processes, the question of survival is not if we can live and work under these conditions, but rather how to adapt more successfully to the new age. It has impact over the companies and the national economy, but mostly, on the whole society. This is especially understandable for companies which are highly internationalized, as Vitaminka is, and are constantly in touch with this phenomenon. Being out of this process, especially when you

are coming from a poor and non-integrated national economy, with high brain drain tendency, a state of permanent political crisis and hardly functioning system, is even harder and without any perspective. As I mentioned, the domestic market is small, with weak purchasing power, so in order for our companies to survive and grow it is necessarily to open themselves toward international markets. In the global market, they need to collaborate or compete with companies coming from highly developed economies, with sophisticated technology and standards, and much better financial and institutional support. They are facing the challenge how to win in this



unequal fight, bringing a benefit to themselves and society. On the other hand, there are Macedonian companies in almost all sectors, especially in the Fast-Moving Consumer Goods (FMCG) industry, which are successfully competing in the global market beside the disadvantage of their “starting position”. But, they do not live on isolated islands of “happiness”, they are still surrounded by the same milieu we described above, and as a part of that milieu they must reform themselves to the process of joining to the “desired company”.

So, the main question that arises is what will happen (what would happen) with the integration of our country into the EU? What will be the impact to companies, to the overall economy and finally to the whole society? What will change? Will we lose or shall we win?

We cannot free up from the impression that the European Union (EU) in Macedonia is seen almost as religion, probably caused by the extremely long and tortuous process of rapprochement. People perceived EU as Eldorado, as a salvation from all odds, which is normally a complete misguided perspective. There is no better way of preparing to the final stages of integration process than clear objective explanation about what EU is and what are the rules of the game. From my point of view, if I could have a few words to describe what EU is, I'll say: high competition, high standards of doing business, better access to the new technologies, know-how and assets, possibilities to learn, highly regulated and liberal business environment in same time, opportunities and threats. Being part of that society, for the companies means removing of almost all bureaucratic barriers and getting approach to the markets of 28 countries, but at the same time to be exposed to enormous strong competition which forces you to be effective if you want to be successful.

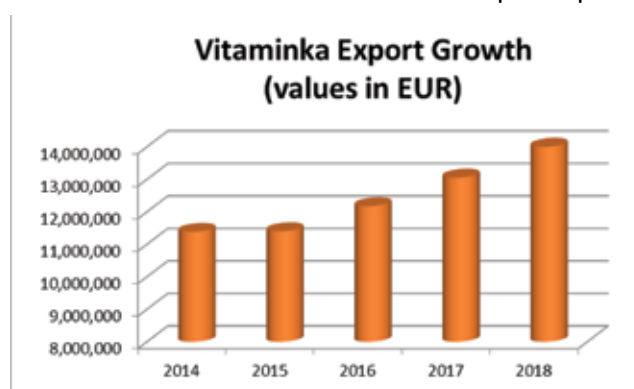
Vitaminka has been developing since 1956, and has thus acquired an extensive expertise in food production, becoming modern equipped leading manufacturing company in the food industry in the country and one of the biggest food producers in South-East Europe.

According to specific needs, customers can choose between different flavors and

performances. The product range consists of nearly 400 types own branded and private label products within following categories: snacks (flips, chips-pellets), chocolates, chocolate coated products, cream spreads, ketchup, mayonnaise, soups, spices, instant vitamin's products, teas, biscuits, cookies, breakfast cereals etc. ISO 9001:2008, HACCP, IFS and HALAL implemented standards ensure the high Halal quality of the products.

Vitaminka has a long history of activities on the EU market and co-operation with EU companies. It exports to more than 30 countries, including Europe, USA, Canada, Australia and Asia. Among the biggest retail chains that are serving cooperatively by honoring our multi-year agreements are: Lidl, Rewe (Billa); Kaufland; Metro C&C; Spar; Delhaize; Coop; Auchan.

Furthermore, the development of trade fairs and increasing their international importance is observed all over the world. Vitaminka participates



at the biggest food exhibitions in the world as an exhibitor. ISM and Anuga in Germany, Sial in Paris and Shanghai, Gulfood in Dubai, World Food in Moscow, Fancy Food in New York bring buyers and sellers together to a central location. Vitaminka uses the international exhibitions as the most effective forms of advertising, although they are more expensive and less operational than other marketing tools. The result of this often accelerates the sales cycle through participating in exhibitions' seminars, in sponsored events, holding meetings at the exhibitions and direct networking on the stand. These events are vital part of the marketing mix of Vitaminka as they create a unique environment in which a wide range of sales and marketing objectives are pursued.

According to our long time experience, to succeed in that society you should accept the rules of the game. To succeed in Germany you should think and act as Germans do. There is no space for improvisation and application of the well-known “Balkan way” of doing business. Doing business, for example, with Lidl in the FMCG industry, means the same as doing business with Microsoft in IT industry or BMW in automotive industry. There is a need to change or to adapt the overall corporative philosophy of doing business, to become effective, innovative, social and environmentally responsible company. It is in the same time a two-way reversible process, from one side the company has a very hard battle on the extremely competitive market place attacked from the producers all around the world, but on other hand, it is a very useful process of learning, which makes the company more efficient, vivid and flexible.

Certainly in such an environment, many companies and even the whole industrial branches will not succeed to survive, i.e., there will be even redefinition of the positions of entire industry sectors. Some of them will grow and gain competitiveness, and some will be completely extinguished. It is well known what happened to the economies and industrial branches in Poland, Czech Republic and Slovakia, after their entry into the EU. But it is also well known

about the decrease of unemployment rate, GDP growth, better and fairer dispersion of national income, and better overall quality of life, they got after entering the EU. Of course, there are also countries that, after joining the EU, cannot boast brilliant achievements, which is just another proof that the EU cannot enforce companies and / or countries to be smart. Simplified, EU just creates, let say, a fair and equal rules for all and suggests what would be good to be done. It is completely up to us If we (as a companies or society) would like to be enough painstaking and smart to use opportunities and to change ourselves in a better way (for example, as R. Ireland, and Baltic countries have done). Our experience says that in EU, as a club of 28 different nations, in business (as in life probably), authenticity always wins, and never (or very rarely) fake or suspicious values succeed. So, besides accepting the EU rules of the game, my recommendation is to create and develop your own authenticity that will result in recognition in such a big market and increase the chances for success.

Finally, we need to be fully aware of the opportunities and obstacles that are waiting us in EU, but we also need to know that the degree of success in the European market and the improvement of the overall quality of life depend, on a large extent, on ourselves. ■

New Member Highlight

KOSTAL

The KOSTAL Group is a German fourth generation family-owned company founded in 1912 with global presence in 21 countries on 5 continents. KOSTAL globally employees over 20,000 people with 83% of them abroad and annual revenue of over \$3.2 billion. Kostal Macedonia, as part of KOSTAL Automotive Electrical Systems, is responsible for the development, production and distribution of components, modules and systems for sophisticated electrical, electronic and mechatronic technology in car bodies. Current customers for the Ohrid facility include BMW, Daimler, Porsche, VW, Audi, Tesla and Rolls Royce with main market sales in Europe and USA.”

CONNECTED WITH THE BEST NETWORK



LIFE IS FOR SHARING.

Makedonski Telekom has the best network, according to P3 Communications testing, for which it was awarded P3 "Best in Test" Certificate 11/2018, an internationally recognized acknowledgement for the quality of the mobile network.

Propoint - Excellence in Printing



Propoint is a company that follows global trends in the field of printing and is always ready to achieve the maximum and therefore it is one of the leading companies on the market. The quality of the printed materials that come out of this company and the timely delivery of the printed and finished product to the customer is due to the modern machines, the successful management, and the dedicated and professional team of the company. Propoint is recognizable for always striving to implement the latest achievements of the technological development in the graphics industry by investing in new technology from world-wide manufacturers such as Heidelberg, Muller Martini, Rile Cart, Kodak, Fuji and others. The products that come out of this company can be found in everyday life, from the most famous brands in the country and the world through promotional materials, catalogues, various food packaging, pharmaceutical products, books, monographs, etc.

History

Propoint DOOEL Skopje was founded in 1996 and started with screen printing. Only a few years after its establishment, the great enthusiasm, belief in success, and vision will redirect the company

into offset printing, and is currently one of the best and largest printing companies in the region. The good strategy, proper development plan, and continuous investment and improvements enable the company to employ 63 employees accommodated in a new facility that meets the highest environment and safety standards.

Achievements

Propoint has been successfully operating on the market for more than 20 years and it is a leader and a recognizable brand that has built an image as a company that manufactures highest quality products, confirmed by the loyalty of their customer base. Its policy of success and achievement is based on production innovation, education and dedication of the employees, and the consistent communication and cooperation with the clients in order to meet their needs for production of top quality products in the shortest time possible. The company focuses on sustainability through the use of clean energy and contributes to the improvement of the environment, significant reduction of negative impact, reduction of CO₂ and other harmful emissions, gases, particulates, etc.

Social and Environmental Responsibility

As a socially and environmentally responsible company, Propoint operates in accordance with its values through capital investment in energy efficiency, continuous improvement of all processes by investing in new machines, and introducing procedures that preserve the quality of the product while protecting the environment. More specifically, Propoint has invested in: modernized B1 format printing machine (Heidelberg); hot gluing machine, stain machine and many other smaller finishing machines; selective MGI UV varnishing machine, and a new high voltage station.

In 2018 Propoint started installing a photo-voltaic station, which will enable the company to use renewable sources of electricity in all its processes. Similarly, the delivery of the printed and finished product to the customers will be done with electric vans in line with the company's dedication to becoming a green (eco) company, a pioneer in the country and the region. The company also started using an enterprise resource planning system (ERP) for analyzing and fully planning, tracking and controlling all resources in the company.

Most importantly, Propoint is a socially responsible company that employs 22 people with disabilities who work on products that require a fine human touch and hand finish. The company also contributes to humanitarian causes and projects, as well as educational and awareness-raising campaigns.



Value of the company

The success of the company is based on the company's greatest value, which is the experienced, professional, creative, and motivated team of employees who unselfishly engage themselves in all projects. Their main motivators are quality, professionalism, diligence, and timely delivery of all printed products. The company's motto is "yes, it's possible." Seemingly 'impossible' projects are seen as a new challenge, a new beginning, a new story narrated and created under high criteria, precise to the smallest detail required by the demands of the customers. The new quality control system is of great importance for the company as well as for its customers.

Electronic advertising and information sharing will never overshadow and reduce the value and significance of printed materials. It is something that can be seen and touched, where every detail, finish, and technique can be appreciated. ■





TEAMWORK
STRATEGY
MANAGEMENT
TRADITION
GOALS



Discussing Digital Transformation with All Web Speakers



As part of our Executive Leadership Talks series and in cooperation with our partner AllWeb, Macedonia's premier digital marketing conference, on November 15, C-level executives of AmCham member companies gathered for an exclusive opportunity to meet one of the headliners of the conference, Matt Desmier.

A regular feature on many annual digital lists (including the BIMA's Top 100, the Maserati 100 and the Digital Leaders Top 100, where he came Runner Up as SME Digital Leader of the Year), Matt is an influential digital champion in the UK and his counsel has been sought by the likes of 10 Downing Street and St James' Palace, as well some other far less prestigious organizations.

Matt was also accompanied by the other international speakers/experts who took part in the AllWeb conference: Amy Guttman, Roger Edwards, Dragan Varagic and Darko Buldioski.

In the cozy atmosphere of Park Hotel&Spa's Brick Eat Bar, Matt and the other speakers offered our CEOs insight into digital transformation and the transformation of brands for the future relying on strategic thinking, innovation and creativity. ■

Boost Your Team Collaboration with Microsoft Teams



At our member-to-member (M2M) session with Meloski Consulting organized on November 20, our members has an opportunity to get familiarized with Microsoft Teams, a user-friendly team workspace that offers many great options for team collaboration, such as conversations and meetings, as well as a place where all the collaboration on projects and documents happens. Our speaker Gorana Konevska Jankoska, MVP, MCT and Business Productivity Consultant at Meloski Consulting, who has been working with Microsoft brand for more than 12 years, explained how Microsoft Teams works within Office 365, and together with other services can boost team communication and productivity. ■



New Member Highlight

RADiUs architects

RADiUs Architects is an architectural office, founded in Skopje 2012 by four award-winning architects. The team is driven by the need for sensitive and responsible development of the physical context in which people live. Radius architects are involved in interdisciplinary architectural projects, such as commercial, residential, educational, medical, industrial, recreational etc. In September 2018 they won the first prize on the national competition for New city hospital in Skopje. Among the big list of project they have done, there is one that is small but very important for Radius architects- Yellow stage in city park in Skopje, small urban intervention that has separated them also as a socially responsible company.

Creating a Safe Working Environment for Women



On December 6, AmCham Macedonia in cooperation with the US Embassy in Skopje marked 16 Days of Activism Against Gender-Based Violence by leading the conversation on creating a safe working environment for women. Local and foreign experts discussed the situation on the ground and global best practices and offered practical mechanisms to address gender-based issues in the workplace. Sneshka Ilikj, a researcher from Reactor, spoke about the preliminary findings from Reactor's ongoing research into sexual harassment in the workplace. The US Embassy's Human Resources officer Barbara Mozdziars presented the policies and mechanisms the US Government utilizes to ensure a working environment free of harassment and discrimination. AmCham's Executive Director Dijana Despodov presented the Universal Business Principles, a set of guidelines for responsible, ethical working that includes respect for the dignity of the worker and creating a safe working environment for women and vulnerable groups.

"It is fundamental to the philosophy of AmCham Macedonia that good ethics and good business are synonymous. We believe that business plays an important role as a catalyst for positive social change by promoting human welfare and the principles of free enterprise. AmCham Macedonia encourages member companies to set the highest standards for ethical business practices and serve as role models for the rest of the economy."- Dijana said.

AMCHAM endorses the following values and expects member companies to comply with the Universal Business Principles: Compliance with all applicable laws; Good corporate citizenship; Respect for the individuality and dignity of the worker; Encouraging diversity and ensuring a safe working environment for women; Investing in training and education for employees; Environmentally responsible business practices; Improved market access and promotion of intellectual property rights; and High standards of professional and business ethics. ■

Sustainability and Circular Economy with Yair Engel



On December 7, AmCham Macedonia hosted the renowned Israeli expert Yair Engel, a designer, expert, and consultant in sustainable innovation and entrepreneurship, Cradle to Cradle and Circular Economy. A leading figure and change agent, Yair has been promoting sustainable design amongst industrials, entrepreneurs, government offices, and academic institutions in Israel and in Europe. This event was supported by the Israeli Embassy in Macedonia and is in conjunction with the international student conference on Energy Efficiency and Sustainable Development at the Faculty of Electrical Engineering (FEIT). In addition to Yair's talk, participants had an opportunity to attend a pitching competition where ideas from the academic papers on energy efficiency were transformed into practical business ideas and presented as such. AmCham members served as mentors and judges to the students and had a unique opportunity to forge ties between the private sector and the academia that produces the workforce. ■



AmCham's 2018 Holiday Party



On December 13, AmCham members gathered to send off 2018 and welcome 2019 with all the possibilities and challenges it brings. More than 120 guests enjoyed each other's company in the cozy atmosphere of Park Hotel's Four Restaurant over the sounds of Macedonian classics played by the Ringtones. It was a perfect wrap-up to a dynamic and successful year for the Chamber. ■



Young Professionals Speed Networking



This winter AmCham introduced an innovation on the networking scene by organizing two speed networking events on November 21st and January 22nd. The concept of speed networking proved to be very popular and interesting for the young and young-at-heart judging by the increasing number of attendees. The events provided an opportunity to meet everyone present in a no-pressure environment and learn more about the companies and professionals who are part of the AmCham family.

Networking events are a great way to expand your base of contacts, potential clients, and partners and AmCham makes sure young professionals get the most out of these events by making connections with as many people as possible. The location of the events was also special – Umbrella Cafe, the first bar in Macedonia that employs people with disabilities. AmCham promotes and encourages members to support social enterprises such as this. ■

New Member Highlight



Propoint is founded in 1992 with an initial activity of screen printing. Working with a continuous and immense respect for printed materials, Propoint has grown into one of the largest, best quality and most modern Offset printing companies in the region.

Constant investment in work equipment, following the greatest achievements in the printing and maintaining the motivation of its employees, the company provides twenty six years of successful gratification even to the most sophisticated wishes of their customers.

Performance Management as a Company Core Value

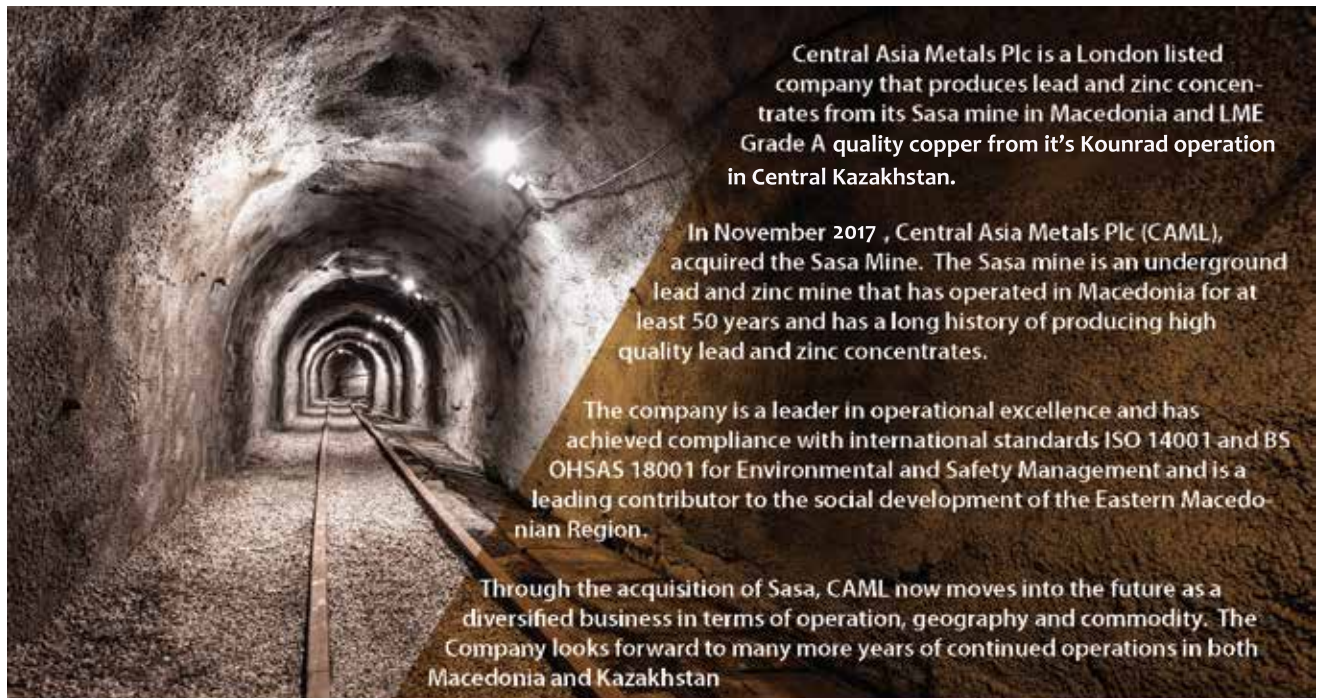


On January 30th, AmCham kicked off the Member2Member learning program for this year with a session by Vasil Kostovski, HR Director at Gentherm Macedonia, on performance management.

Vasil shared some insights on the performance evaluation process in his company, helping attendees to improve their understanding of effective performance management and recognize its importance and benefits.

Kostovski also identified the role and responsibilities of the employees in charge of conducting the performance management processes.

One of the conclusions was that HR professionals must find creative ways when presenting their feedback to the employees in order to keep them motivated even if the feedback is negative. ■



Central Asia Metals Plc is a London listed company that produces lead and zinc concentrates from its Sasa mine in Macedonia and LME Grade A quality copper from its Kounrad operation in Central Kazakhstan.

In November 2017, Central Asia Metals Plc (CAML), acquired the Sasa Mine. The Sasa mine is an underground lead and zinc mine that has operated in Macedonia for at least 50 years and has a long history of producing high quality lead and zinc concentrates.

The company is a leader in operational excellence and has achieved compliance with international standards ISO 14001 and BS OHSAS 18001 for Environmental and Safety Management and is a leading contributor to the social development of the Eastern Macedonian Region.

Through the acquisition of Sasa, CAML now moves into the future as a diversified business in terms of operation, geography and commodity. The Company looks forward to many more years of continued operations in both Macedonia and Kazakhstan

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ASIA
METALS
PLC**

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contact@sasa.com.mk

Kounrad Copper Project
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Kounrad Copper Company LLP
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100300, Balkash, Karaganda reg.
Kazakhstan
Office: +7 71036 45065
sarykazna@sarykazna.kz
kounrad@kounrad.kz

Farewell Reception for Ambassador Jess L. Baily



On February 12th, AmCham Macedonia organized a Farewell Cocktail Reception for outgoing Ambassador of the United States to Macedonia, H. E. Jess L. Baily, and Mrs. Capie Polk Baily at the National Gallery of Macedonia – Daut Pashin Amam.

Ambassador Baily has served as the Ambassador of the United States to Macedonia for four years and has not only consistently supported the activities of AmCham, but also actively promoted Macedonia and contributed to the quality of US - Macedonian business relations.

We are grateful to all our members who joined us to bid farewell to Ambassador Baily and Mrs. Polk Baily and wish the Baily family good luck in their future endeavors. ■



AmCham Advantage Program



The AmCham Advantage Program offers valuable discounts to members in good standing at AmCham member establishment. If you are interested in participating in this program, please email info@amcham.com.mk



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IWM Network offers AmCham members a 1-hour free digital transformation consulting, which provides creative ways in which businesses can flourish in today's digital world. The consulting service provides an introduction to the most digitally efficient methods of achieving the goals of a business, including a mix of digital technologies, such as digital strategy, digital operations, digital customer experience, and more.



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- Ultranet Ultra

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