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CONFINDUSTRIA EST EUROPA

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ISSUE VIII
AUGUST 2026



THE DANUBE RUNS DRY AND THE ENERGY BILL

The summer of 2026 tested the energy resilience of Central and Eastern Europe, and the decisive variable did not come from the markets: it came from the level of a river. The drought that reduced the flow of the **Danube** struck the power stations that draw their cooling water from it, confronting two countries of the network with the same problem.

In **Romania** the **Cernavodă** nuclear plant shut down a first reactor at the end of July; on **11 August** the continuing fall in the river level made the closure of a second reactor likely within forty-eight hours, because the available water no longer guaranteed the safe operation of the pumps.

In **Hungary** the response was infrastructural: a **submerged weir** was built in the river, many thousands of tonnes of rock poured into the riverbed to raise the water level in front of the intakes. The works proceeded faster than expected and by **24 August** three of the four reactors at **Paks** were operating again. This is no technical detail: Paks supplies almost **half of Hungary's electricity demand**, and during the critical weeks the country imported electricity at high prices.

The wider picture remains one of caution. On **7 August** gas storage stood at **76.55%** in Italy against **58%** for the European average; the following day a drone coming from Romania exploded near a Bulgarian gas pipeline.

The mechanism deserves attention. Cernavodă and Paks lie hundreds of kilometres apart and belong to distinct national electricity systems, yet they draw water from the same river: a single climatic variable was enough to put two grids under pressure at once.

For Italian companies operating in the region the message is that energy security is not played out on supply contracts alone, but on physical infrastructure and its capacity to withstand conditions that until a few years ago were considered exceptional.

TOP NEWS

- **Scenario** — At Bled, Central Europe's prime ministers and the enlargement Commissioner.
- **Brussels Focus** — France and Germany call for new trade defence tools and a roadmap on China.
- **Serbia** — On 11 September in Belgrade, Italian food turns into solidarity.
- **Poland** — Karpacz, 8 to 10 September: the thirty-fifth Economic Forum of Central and Eastern Europe.
- **Albania** — Ten years of the Association told by its founding members, in a series of video interviews.
- **Bulgaria** — The Association partners the «Gala in Sofia» festival: three evenings of opera and concert.

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AT BLED, ENLARGEMENT IS BACK AT THE CENTRE

On **31 August** the **Strategic Forum** opened in **Bled**, Slovenia's main foreign policy event. It was opened by Foreign Minister **Tone Kajzer** and Prime Minister **Janez Janša**; the inaugural session, devoted to Europe's future in the face of global uncertainty, was also attended by the Slovak President and the Prime Ministers of **Hungary**, **Croatia** and the **Czech Republic**. At the centre of the proceedings: Central Europe and its neighbours, with particular attention to the **enlargement process**.

One detail says much about the moment: unlike previous editions, the heads of the main European institutions were not invited. Four Commissioners did attend, however, among them the Slovene **Marta Kos**, responsible for enlargement itself.

The **Central European Initiative** was represented by Secretary General **Franco Dal Mas**: «It is essential to give new impetus to the European Union's enlargement to the Western Balkans», he said, in a scenario where «even traditional Euro-Atlantic relations appear more uncertain». The CEI, he added, contributes «through regional cooperation, dialogue and concrete support for the European perspective of the candidate countries». At Bled he met Kajzer and Commissioner Kos.



CEI Secretary General Franco Dal Mas at Bled

Seven days earlier the same Secretariat had been at the centre of another step. On **24 August**, in Trieste, the President of the **Chamber of Commerce and Industry of Serbia Marko Čadež** and the Secretary General of the **Western Balkans 6 Chamber Investment Forum David Piegazki** visited the CEI Executive Secretariat. It is the same Chamber that on **22 May** hosted at its own headquarters in Belgrade the **CEE – Western Balkans Energy, Infrastructure & Industrial Security Forum**, co-organised with Confindustria Serbia.

For the companies of the network, enlargement is not a matter for chancelleries: it means the progressive extension of the single market to the Balkan partners, and rules that fall into line. The follow-up to watch has a name — the **Action Plan** the CEI is preparing: that is where connectivity stops being a principle and becomes a list of works.



The corridors between the Adriatic and Central Europe



EUROPE LOOKS FOR NEW TOOLS IN THE FACE OF CHINA

On **17 July**, at the twenty-sixth Franco-German Council of Ministers held in **Brühl**, **France** and **Germany** asked the **European Commission** for rapid, concrete proposals to strengthen trade defence instruments, industrial policy and European economic security. Among the options put forward is a new **European resilience instrument** to reduce dependencies in critical sectors and the excessive concentration of supply chains.

Emmanuel Macron and **Friedrich Merz** instructed their ministers for the Economy, Finance and Foreign Affairs to draw up a joint roadmap on China by **September**, which will feed the European discussions of the autumn. The stated objective is not decoupling, but a combination of dialogue, **de-risking** and protection of European industry: industrial overcapacity and subsidies, the speed of trade defence investigations, market access and technology transfers. Macron spoke of a «historic convergence».

The main novelty is the German position. In the programme for growth and employment adopted by the coalition on **2 July**, Berlin announced a new external economic policy strategy: faster and more sector-specific anti-dumping and anti-subsidy measures, action against circumvention and, in certain strategic sectors, technology transfer obligations for investors from some third countries.

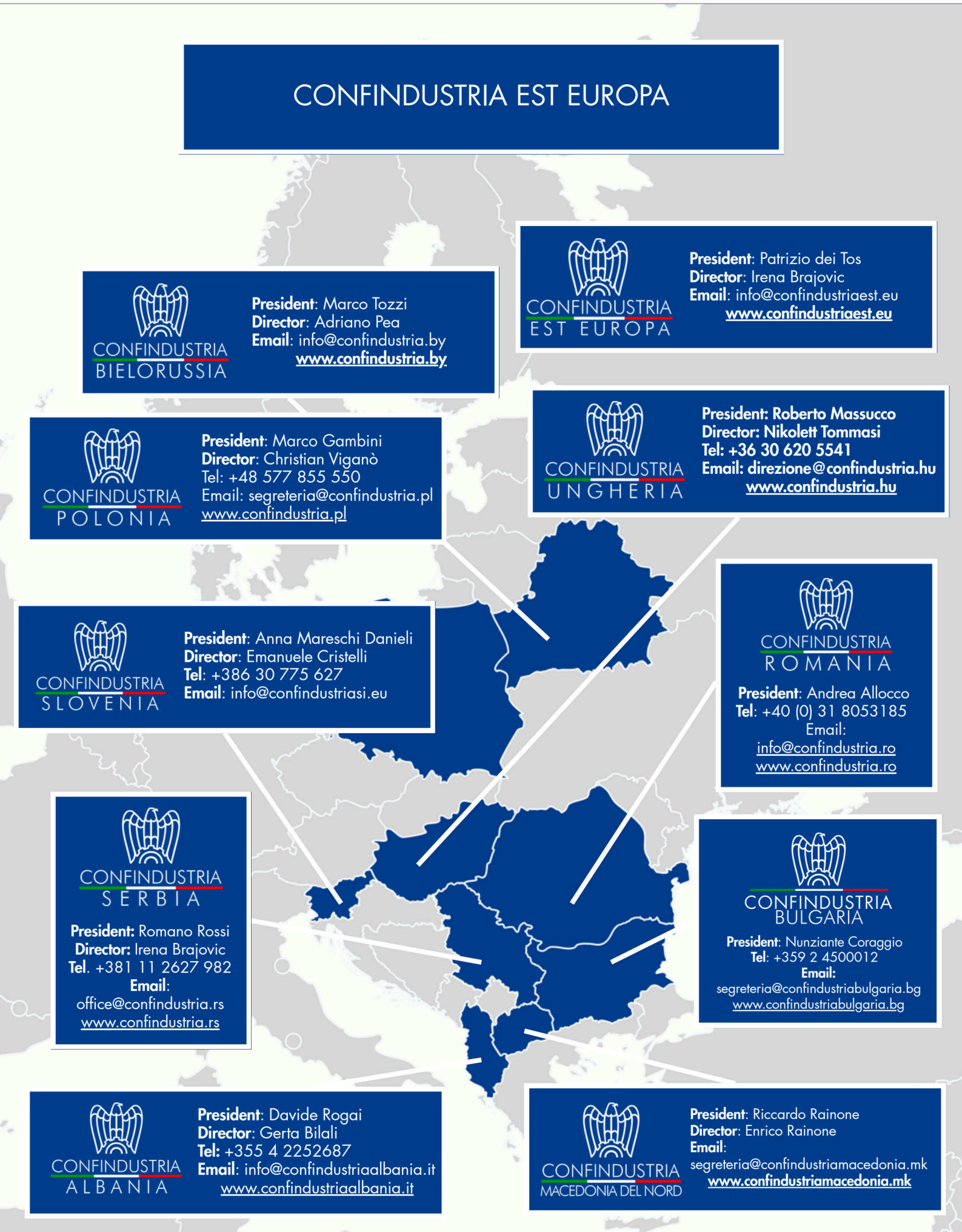
Operationally, Paris and Berlin will strengthen cooperation on **critical raw materials**: a round table with companies on the permanent magnets and **rare earths** value chain, and a European mining intelligence platform.

The picture is broader. On **13 July** the **Foreign Affairs Council** approved the document on the Union's strategic context: **Russia** is the most immediate and direct threat, **China** a critical long-term strategic challenge that uses trade imbalances and control of raw materials as instruments of pressure. Threats to European security, it acknowledges, are now also **geoeconomic**.

For the companies of the network the point is concrete: the centre of gravity of the European debate is shifting towards industrial policy, and with it the files on the **Industrial Accelerator Act**, on the screening of foreign investment and on public procurement. Those working in Central and Eastern Europe, where manufacturing chains are long and interwoven, would do well to follow them closely.

Article by the Delegation of Confindustria to the European Union

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CONFINDUSTRIA SERBIA

«Mangia. Dona. Ama.»: Italian food for children with cancer

On **29 July Confindustria Serbia** opened invitations to the second edition of the charity festival **«Mangia. Dona. Ama. — Jedi. Voli. Doniraj.»**, to be held on Friday **11 September 2026** from **18:00 to 22:00** at **Gastrošor** in Belgrade, Žorža Klemansoa 27. The Association and **NURDOR**, the national association of parents of children with cancer, renewed their collaboration by signing a protocol: **all funds raised** during the evening will go to the care of children and adolescents with cancer. **Fifteen** partner companies provide the food, the drinks, the production and a creative workshop for the youngest guests. The **food voucher** costs **500 dinars** and is available in presale, reserved for companies.

CONFINDUSTRIA POLONIA



Karpacz, the meeting point of Central and Eastern Europe

On **7 August Confindustria Polonia** drew companies' attention to the thirty-fifth edition of the **Karpacz Economic Forum**, to be held from **8 to 10 September 2026** at the Hotel Gołębiewski in Lower Silesia and organised by the **Institute for Eastern Studies**. This year's title, «The Architecture of the New Order – Stability in Times of Change», states the ambition of the event: to read the transformations of international geopolitical and economic balances. The 2025 edition drew more than **6,000 participants** and over **600 events** across panels and plenary sessions. At the centre of the discussion are **economic security** and industrial competitiveness, with reshoring and nearshoring as levers for stronger supply chains, **energy** and the transition, and artificial intelligence.



CONFINDUSTRIA ALBANIA

Ten years told by those who made them

In August **Confindustria Albania** launched «**10 anni, le nostre storie**», the series of video interviews in which the Association retraces its first decade through the voices of the entrepreneurs who built it. On **24 August** it opened with **Claudio Michelacci**, Vice President, founder and Sole Director of Alban Costruzioni and a founding member; on the **25th** came **Maria Cristina Busi Ferruzzi**, Vice President, President of ACIES and founder of CCBS – Coca-Cola Bottling Shqipëria; on the **27th Mario Tonucci**, First Vice President with responsibility for relations with Albanian institutions, present in the country with his firm since **1995**; and on the **28th Giordano Gorini**, Vice President and Chief Executive Officer of Essegei, in Albania since 2002 in hydropower, where the group runs **22 plants**.

CONFINDUSTRIA BULGARIA



«Gala in Sofia»: the Association alongside the festival

From **25 to 27 August Confindustria Bulgaria** was a partner of the **«Gala in Sofia» 2026** festival, among the capital's cultural events of greatest international standing. The first evening staged **Tosca** by **Giacomo Puccini** with tenor **Kaufmann**; on the **27th David Garrett** performed, while **Sonya Yoncheva** was the protagonist of both evenings, together with the chorus, orchestra and ballet of the Sofia Opera. As a partner, the Association offered its members a **10%** discount on tickets and, to interested companies, a package of visibility opportunities. For the Association, a presence on a programme of this standing is a channel of relations with the local economic and institutional community.

MORE THAN MEMBERS. PARTNERS.

Confindustria Est Europa promotes a model of strategic collaboration among businesses, institutions and regions, through **two instruments designed to create shared value**:

13 Thematic areas

- **GREEN PARTNER** — Sustainability and ecological transition
- **INNOVATION PARTNER** — Innovation and digital technologies
- **INFRASTRUCTURE PARTNER** — Infrastructure and logistics
- **ENERGY PARTNER** — Energy and energy security
- **CYBER PARTNER** — Cybersecurity, data protection, AI
- **DEFENCE PARTNER** — Defence industry and dual use
- **PMI GLOBAL PARTNER** — Internationalisation of SMEs
- **TALENT PARTNER** — Training, talent and young people
- **HEALTH PARTNER** — Life sciences, healthcare, pharmaceuticals
- **AGRI-FOOD PARTNER** — Agribusiness, food supply chains, traceability
- **FINANCE PARTNER** — Insurance, fintech and payments, advisory and export finance
- **CULTURE PARTNER** — Economic diplomacy, branding, business culture
- **MANUFACTURING PARTNER** — Advanced manufacturing, automation, machinery

THEMATIC PARTNERSHIPS

Exclusive collaboration paths for companies wishing to stand out in one strategic field. **Every thematic partner:**

- Gains **institutional visibility** at events and in the newsletter, website and podcast;
- **Takes part in dedicated projects**, thematic round tables and missions;
- Receives an **exclusive badge** and tailored content;
- Enters a direct channel of dialogue with our representations across Central and Eastern Europe.

SUPPORTING PARTNER

A flexible option for those who wish to support the network's activities with a cross-cutting profile, without a thematic commitment.

- Those approaching our network for the first time;
- Those wishing to support the European project of Confindustria Est Europa;
- Those aiming to consolidate their institutional presence in the Balkans and Eastern Europe.

CONFINDUSTRIA EST EUROPA

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