



Co-funded by the
Erasmus+ Programme
of the European Union

Erasmus + project No. 585961-EPP-1-2017-1-AL-EPPKA2-CBHE-SP (2017 -2926/001 -001)

Project Title:

*“GRaduates Advancement and Development of
University capacities in Albania”*

GRADUA

REPORT

Employment, skills and education in Albania

Tirana, September 2018

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Abstract

This report was prepared in the context of the GRADUA Project, which aims to support the advancement of graduates and development of higher education institutions (HEI)'s (higher education institutions) capacities in Albania through building a graduates' data platform for matching the educational supply and the demand for qualified labor, enhancing university-enterprise cooperation and building related institutional capacities in partner HEIs. One of the first activities foreseen under this project is the review of the education and labor market in Albania, which is reflected in this report.

This report analyses in details the main economic (sub-)sectors of the Albanian economy, with particular focus on youth employment potential, largely based on desk research.

Since the early transition, Albanian economy has grown at a high pace. Despite constant growth, industrial and trade performance still show lack of competitiveness of the economy. Among key factors elements hampering competitiveness are the lack of specialized and skilled labor force.

Unemployment is one of the major socio-economic challenges faced by the Albanian society and at the same time one of the drivers behind mass migration.

Furthermore, unemployment among youth is still high. According to the latest statistics, education does not result to improve the chances for employment, posing serious questions about the education quality and its gap with labor market needs.

Strengthening the education system and its links to the labor market is expected to contribute towards reduction of unemployment, especially among youth, which is also important in the context of the Albania's EU integration. Albania is a country in transition, whose main priority is the EU integration. In June 2014, Albania was granted EU candidate status, the first step towards full EU membership. The Government of Albania's strategic vision is to turn the country's economy from a low productivity, informal and import-dependent to a modern, innovative and highly productive economy. Strategic priorities of the government are articulated in the National Strategy for Development and Integration (NSDI 2014-2020). The vision of the Employment and Skills Strategy is to have by 2020 a competitive economy and an inclusive society that is grounded on: ***“Higher skills and better jobs for all women and men”***.

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1. Introduction and approach

This report was prepared in the context of the GRADUA Project. The 3 year (2017-2020) GRADUA Project aims to support the advancement of graduates and development of HEI's capacities in Albania through building a graduates' data platform for matching the educational supply and the demand for qualified labor, enhancing university-enterprise cooperation and building related institutional capacities in partner HEIs. One of the first activities foreseen under this project is the review of the education and labor market in Albania, which is also the focus of this report.

Since the early transition, Albanian economy has grown at high pace. Despite constant growth, industrial and trade performance still show lack of competitiveness of the economy. Among the key factors elements hampering competitiveness are lack of specialized and skilled labor force. According to the Global Competitiveness Report 2015-2016, Albania ranks in the 93rd position of 140 countries, losing 4 places from 2012-2013 (Schwab & Sala-i-Martin, 2016). In the labor market efficiency, the country ranks 97th, losing 4 places from 2014-2015, whereas in innovation, the country is at the 118th place. In terms of the general socio-economic development, as measured by the Human Development Index (HDI), the country figures in the 'high human development' category, ranking 85th out of 187 countries and territories in 2015, down by 15 positions compared to 2 years before (UNDP, 2015). Different sectors are characterized by various patterns and challenges in terms of performance and contribution to the economy, including employment. The two most important groups of sectors in terms of contribution to economy as measured by the key indicators (namely contribution to GVA, recent trend (expressed as average growth in the last 3 years) and contribution to employment) are Agriculture, Forestry and Fishing (NVE1: A1) and Trade, Transportation, Accommodation and Food, as well as and Business and Administrative Services and ICT (NVE1: A7, A8, A9, A10, A11, A12, A13, A14, A19) (Imami, 2016). Albanian agriculture sector has kept increasing constantly since 2000 till nowadays – however, despite being the main employing sector, the contribution to total employment (in absolute and relative terms) has been decreasing significantly (and is expected to further decrease). This was one of the few sectors that did not experience decline during the recent international financial crisis. Another important sector marking continuous growth is trade (wholesale and retail). On the other hand, construction, which was a booming sector during the 2000', marked a strong decline in the late 2000 and early 2010' – the decline started during the years of the financial crisis which affected Albania's EU neighboring countries.

This report analyses in details the main economic (sub-)sectors of the Albanian economy, with particular focus on the youth employment potential and professional skills, largely based on desk research.

Strengthening the education system and its links to the labor market is expected to contribute towards reduction of unemployment, especially among youth, which is important also in the context of Albania's EU integration (Albania is a country in transition whose main priority is the

EU integration). In June 2014, Albania was granted the EU candidate status, the first step towards full EU membership. The Government of Albania’s strategic vision is to turn the country’s economy from a low productivity, informal and import-dependent to a modern, innovative and highly productive economy. Strategic priorities of the government are articulated in the National Strategy for Development and Integration (NSDI 2014-2020). The vision of the Employment and Skills Strategy is to have by 2020 a competitive economy and an inclusive society that is grounded on: “**Higher skills and better jobs for all women and men**”.

In order to strengthen the linkages and orientation of the education market towards the labor market requirements, it is necessary to monitor the employability of graduates across disciplines, sectors and educational institutions. This is also the aim of the GRADUA project – to establish a platform to fill in this gap, by using a combined set of tools to collect and process information about students and graduates’ position in relation to the labor market.

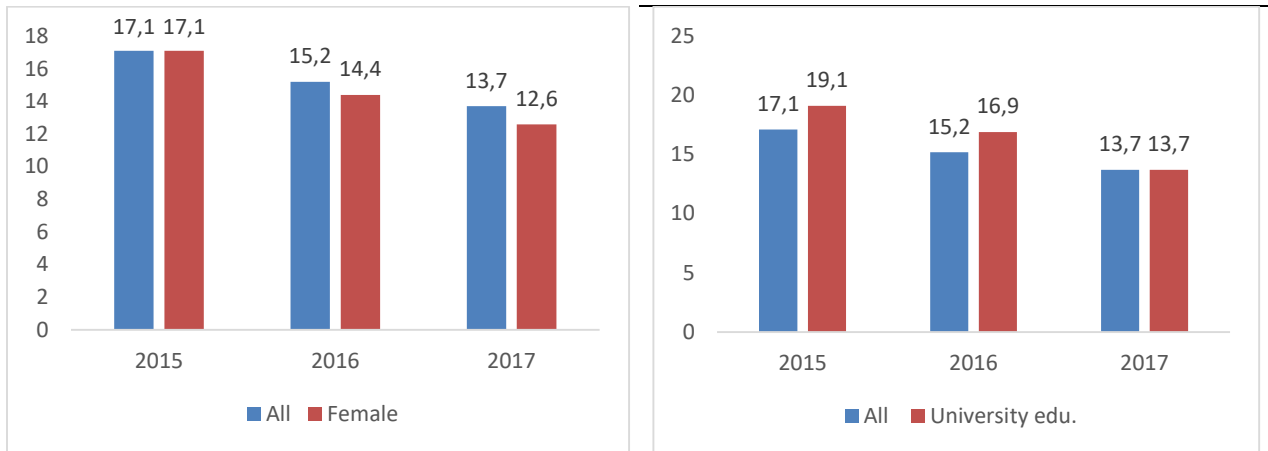
2. Overview of the Albanian economy, demography and labour market

2.1 Employment

Unemployment is one of the major socio-economic challenges faced by the Albanian society – unemployment is also one of the drivers behind mass migration. According to the official statistics, Albania seems to be performing far better compared to various neighboring and EU countries. However, it has to be noted that since the largest employment is reported in the agriculture sector (described below in this chapter), there is a common understanding that there is a high rate of hidden unemployment, especially in the agriculture sector – thereby real unemployment is considerably higher.

Unemployment is lower among females because overall labor market participation rate is lower among them. In terms of education, there are not major differences in unemployment between those with university education and the rest, going contrary to the expectation that university education should enhance employment opportunities. There may be several explanations behind this phenomenon – quality and gap between education and labor market requirements, could be key reasons.

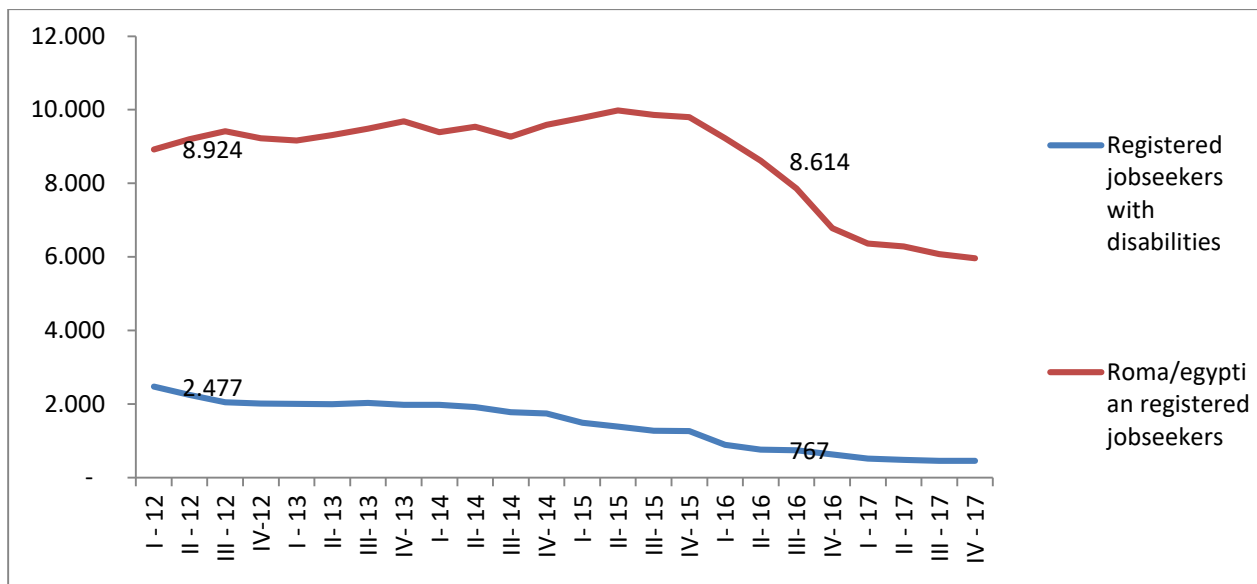
Figure 1: Unemployment rate (percentage)



Source: INSTAT (2018)

The Albanian government and various donors have made significant effort to tackle unemployment for marginalized or especially exposed groups such as minorities (e.g. Roma) and disabled people. In Figure 2 below there can be observed a decrease in the number of job seekers especially among Roma community, according to the official statistics. However, it is not clear what is the number of unemployed Roma community that register as job seekers. According to Imami (2016), there are claims from Roma community that de-facto unemployment is very high and increasing in the context of formalization of the economy (since the Roma community has been traditionally involved in informal economic activities such as informal trade), while there is reported mass migration from this marginalized community.

Figure 2: Registered job-seekers (unemployment) for special (exposed) categories



Source: INSTAT (2018)

The unemployment rate in Albania (for the age-group 15-64 years old) was about 14 percent in 2017. Youth unemployment (aged 15-29) remains a crucial issue (over 25%), but the rate has begun to decrease over the last years. Youth aged 15-29 not in employment, education or training accounted for 1/4 of all youth population in 2017.

Table 1: Unemployment rate by age group, year, and gender

Age group	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Albania											
15-29	19.8	24.7	21.9	22.5	21.9	26.0	27.2	32.5	33.2	28.9	25.9
30-64	10.7	10.0	10.4	10.8	11.1	10.0	13.1	13.3	12.5	11.8	10.8
All	13.4	13.1	13.8	14.0	14.0	13.4	15.9	17.5	17.1	15.2	13.7
Male											
15-29	22.8	25.5	21.6	23.8	22.8	28.4	29.7	35.6	32.3	29.7	27.0
30-64	10.7	9.1	8.5	8.3	10.0	10.4	14.6	14.0	12.2	12.2	11.3
All	14.3	12.5	12.2	12.6	13.6	14.6	17.8	19.2	17.1	15.9	14.6
Female											
15-29	15.8	23.8	22.2	20.7	20.6	22.0	23.6	27.4	34.7	27.8	24.0
30-64	10.6	11.2	12.9	14.0	12.4	9.5	11.2	12.3	12.9	11.2	10.1
All	12.2	13.7	15.8	15.9	14.4	11.7	13.5	15.2	17.1	14.4	12.6

Source: INSTAT (2018)

As it might be expected, a large share of unemployed people is located in Tirana (the largest urban qark) – namely almost 1/3 of the total national unemployed young people are located in Tirana. It is common that many young people from all over Albania come to Tirana for education and/or training, and part of them tend to stay.. Tirana is also a preferred location for many returning migrants who lived in other regions before emigration.

Table 2: Number of youth unemployed by region (qark) - Youth aged 15-29 years old, second quarter 2016

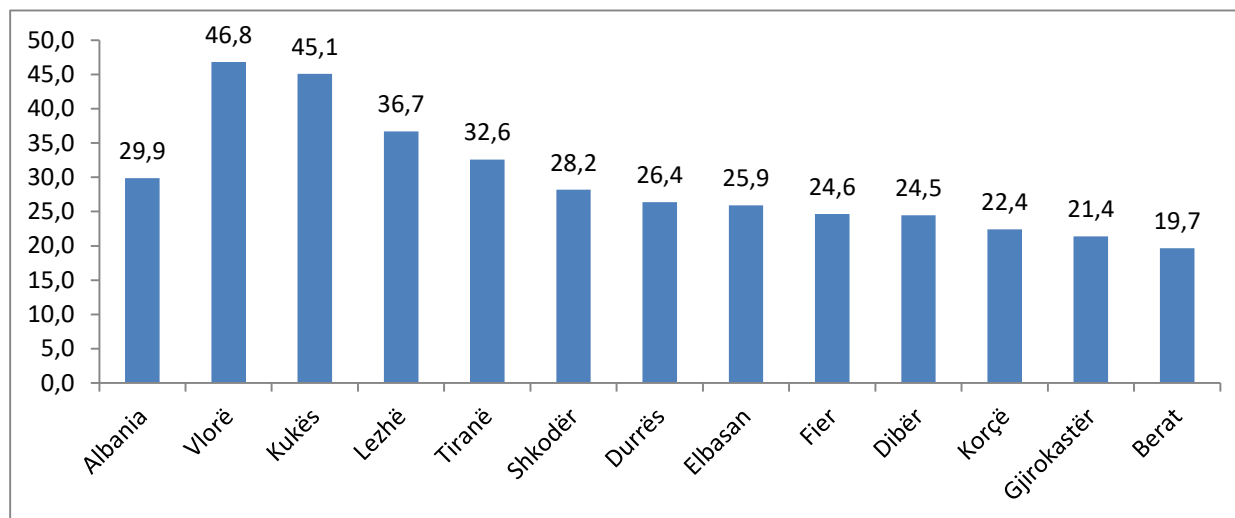
Qark	No unemployed	Share to total
Tiranë	28,103	32%
Vlorë	11,659	13%
Elbasan	8,836	10%
Durrës	7,875	9%
Fier	7,473	9%
Shkodër	6,257	7%
Lezhë	4,464	5%
Korçë	3,630	4%
Berat	2,510	3%
Kukës	2,456	3%
Dibër	2,346	3%

Gjirokaštër	1,975	2%
Total	87,583	100%

Source: INSTAT (2017)

The regions with the highest levels of youth unemployment rate are Vlora in the South, Kukës and Lezha in the North, and Tirana in Central Albania.

Figure 3: Unemployment rate by region (qark) - youth aged 15-29, second quarter 2016



Source: INSTAT (2017)

A distinct feature of the Albanian labor market is the relatively high proportion of discouraged workers. The labor force participation rate has marked a significant increase since 2013. There is observed an increase of the labor force participation rate in all the age categories, including also young groups (15 – 29), from 2013 until 2015 – that is mainly due to formalization, which has recently been a priority of the current.

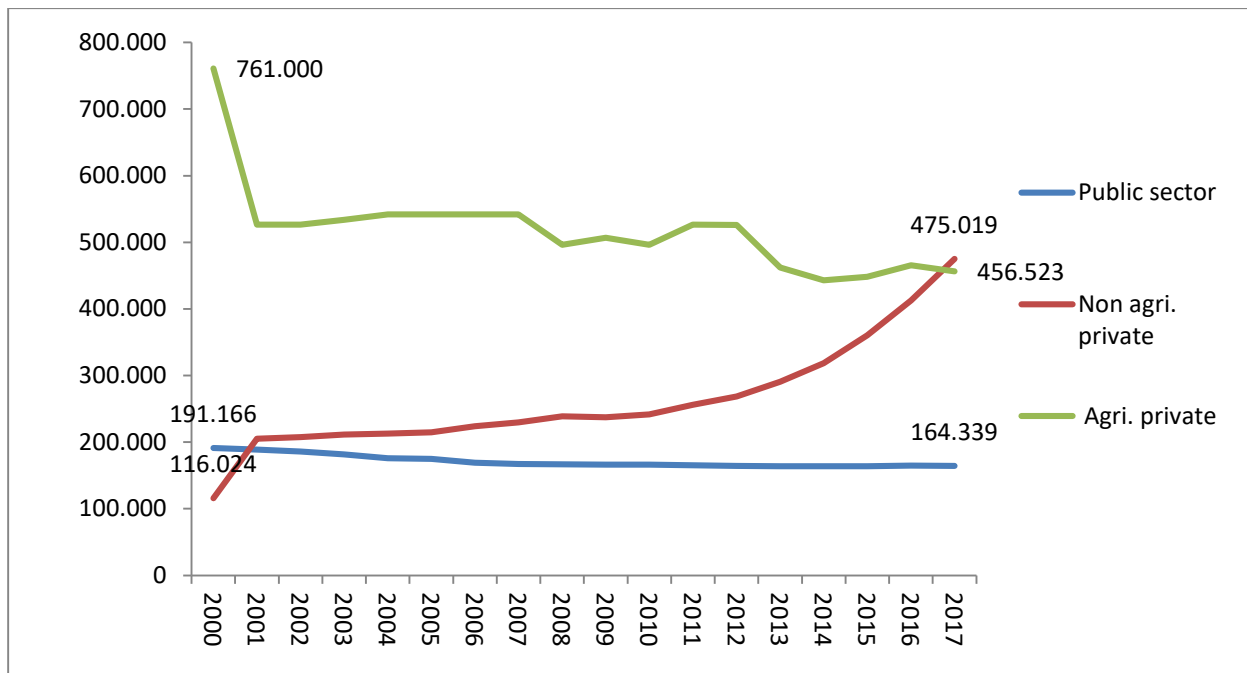
Table 3: Labor force participation rate

Age group	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Albania											
15-29	50.1	41.6	45.6	44.3	54.8	46.6	38.7	41.9	44.5	45.7	45.6
30-64	75.6	71.8	73.2	74.4	76.7	73.8	71.1	72.3	74.5	76.1	77.0
All	58.0	53.3	55.1	55.2	60.3	57.3	52.4	53.7	55.7	57.5	58.3
Male											
15-29	57.1	48.2	52.5	51.6	62.2	54.1	47.9	51.2	52.8	51.7	52.8
30-64	86.5	84.1	87.2	86.3	85.2	84.2	82.9	84.5	85.2	85.8	87.8
All	66.9	61.7	64.9	64.0	67.9	65.5	61.7	63.5	64.3	65.0	66.8
Female											
15-29	43.2	35.6	39.8	37.4	47.0	37.7	30.1	32.0	35.4	38.8	37.2
30-64	64.9	60.9	60.3	63.3	68.6	64.4	60.7	61.2	64.6	66.8	66.7

All 49.5 45.7 46.2 46.9 52.9 49.2 44.0 44.4 47.2 49.9 49.8
 Source: INSTAT (2018)

Albania’s labor market has undergone some shifts over the last decade. Between 2000 and 2017 non-agricultural employment in the private sector more than doubled. Emigration and urbanization brought a structural shift away from agriculture and toward industry and a variety of services, including banking, telecommunications and tourism, which have been growing recently. Over the years, there has been observed a significant decrease in employment in the agriculture sector (as mentioned earlier, due to socio-demographic and economic structural changes) – namely more than 40 percent reduction since 2000. In the coming years, when the sector modernizes and productivity increases, the number of employees in the agricultural sector may further fall.

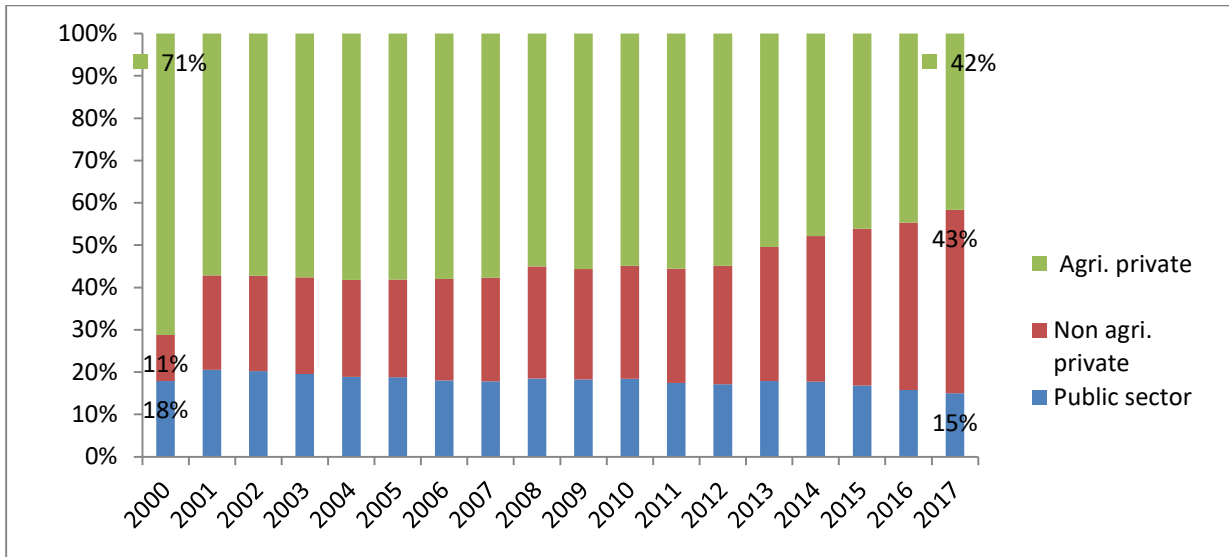
Figure 4: Employment by sector and year



Source: INSTAT (2018)

In terms of structural employment comparison, in 2000, 71 percent of the employed people were reported to be employed in the agriculture, 11 percent in the non-agriculture private sector and 21 percent in the public sector, whereas in 2017, the respective weight was 42 percent, 43 percent and 15 percent.

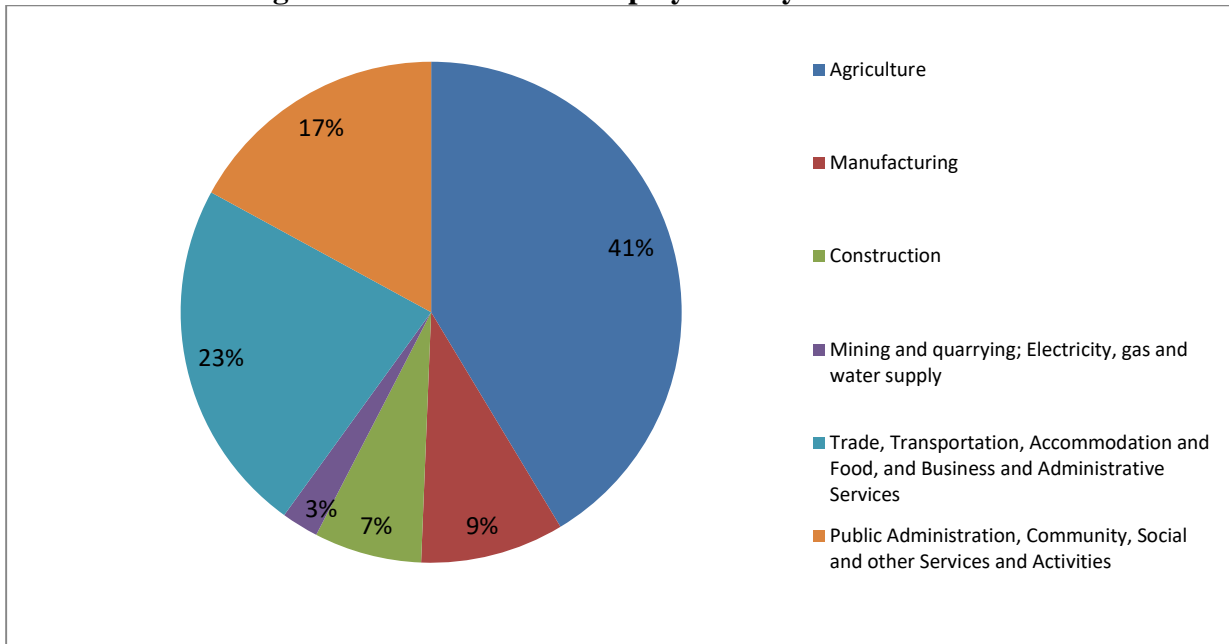
Figure 5: Structure of employment by sector and year (percentage)



Source: INSTAT (2018)

Figure 6 below shows that the largest employing non-agriculture private sector is trade, transportation, accommodation and food and business services.

Figure 6: Distribution of employment by sectors in 2015



Source: INSTAT (2017)

2.2 Policy and institutional background

The main rationale of employment promotion programs initiated by the Government of Albania has been to reduce unemployment and informality, increase worker employability, and move them into regular non-subsidized employment in the long term. More specifically, the rationale for the creation of the employment promotion programs has foreseen the creation of new jobs to decrease unemployment, including youth unemployment and other vulnerable groups. It has also aimed at providing vocational training to decrease skills gaps of the unemployed and assist employers with a better selection of the workforce. Furthermore, the programs intend to reduce informality and reduce economic costs by including people benefiting from other social support schemes into the programs (Employment Promotion Programs in Albania: An assessment of its quality in the formulation and implementation processes 2008-2014, Report December 2014).

There are various employment promotion programs, which provide subsidized employment and training such as on the job training, vocational training, or internships. With international support and in line with the ‘Europe 2020’ agenda, Albania has developed a National Employment and Skills Strategy (NESS 2014-2020) to ensure greater opportunities for youth to secure decent work and income over the life cycle, contributing to a virtuous circle of poverty reduction, sustainable development and social inclusion. The vision of the Employment and Skills Strategy is to have by 2020 a competitive economy and an inclusive society that is grounded on: **“Higher skills and better jobs for all women and men”**. The overall goal of the Strategy is *to promote quality jobs and skills opportunities for all Albanian women and men throughout the lifecycle*. This will be achieved through coherent and concerted policy actions that simultaneously address labor demand, labor supply and social inclusion gaps.

The Employment and Skills Strategy focuses on four strategic priorities, as follows:

- A. Foster decent job opportunities through effective labor market policies
- B. Offer quality vocational education and training to youth and adults
- C. Promote social inclusion and territorial cohesion
- D. Strengthen the governance of the labor market and qualification systems

The basic condition for closing the job gap is to stimulate the demand through employment-friendly macroeconomic policies, aimed at supporting the aggregate demand and increasing productive investments, without endangering fiscal sustainability. The primary objective, therefore, is to mitigate the impact of fiscal consolidation on the labor market in the short run and set the conditions for employment growth in the medium to long term (Employment and Skills Strategy 2014-2020).

The implementation of public employment services in the labor market is done by the National Employment Service (NES) established by the Council of Ministers (CoM) Decision “On the approval of the status of the National Employment Service” No. 42(17.01.1998), amended with CoM Decision No. 263(25.05.2000), amended with CoM Decision No. 17(10.01.2003), and Order No. 247(18.10.2006) “On the approval of the structure and organogram of the National Employment Service”. The National Employment Service is an autonomous public service that

aims at providing services and financial support for job-seeking efforts, efficiently implementing and administering state programs and projects provisioned by law, and developing the labor force through skill investment, self-employment initiatives, flexibility, labor mobility, and competitive skills. NES extends its services to all districts of Albania through employment offices.

2.3 Education system in Albania

Since 1997, following UNESCO recommendations on the classification of schools and fields of study defined by “ISCED -97”, International classification, Educational Standards 1997, the schools in Albania are subdivided as follows: :

- 0 Level Pre-elementary school;
- 1st Level Lower level of 9-year school;
- 2nd Level Higher level of 9-year school;
- 3rd Level High school education;
- 4th Level Post high school education but not university;
- 5th Level University and non-university education;
- 6th Level Post university education, BD, PHD etc.

Basic education is obligatory for pupils. It is organized in two levels: 5 years in primary level and 4 additional years. The 3rd level (high school) includes general, professional (vocational) and non-professional high schools of 3, 4 and 5 years. The 5th level includes public and private universities. Secondary and university education is mainly organized in the full-time education basis.

The high interest for pursuing the university education is imposed by the higher demand for qualified and educated specialists in the labor market. State universities responded to the high demand for university enrolment with the increase of the available positions. Given the high level of unemployment among youth in Albania, higher education degree enhanced chances to find a job, while in many sectors, having a university degree is a prerequisite to access to jobs.

As shown in the Table 4 below, the number of students has increased significantly, more than tripled since 2000 or doubled since 2005.

Table 4: Dynamics of the number of students by gender ¹

¹ Note: The data correspond to the academic years. For example, 2017 refers to the academic year 2016-2017.

Indicator	2000	2005	2010	2013	2014	2015	2016	2017
Total	40,125	63,257	122,326	172,561	173,819	160,527	146,756	139,607
Male	16,095	25,129	54,439	76,202	75,527	69,489	61,643	56,979
Female	24,030	38,128	67,887	96,359	98,292	91,038	85,113	82,628
Share Female/Total	60%	60%	55%	56%	57%	57%	58%	59%

Source: INSTAT (2018)

Private universities were practically inexistent during early transition and had a very modest weight until 2005 (counting less than 1,000 students). However, in the following years, there was a boom in the establishment of private universities, as well as in the number of students enrolled in these universities, exceeding 30,000 students in some years (or almost 1/5 of the total number of students). Despite this increase, public universities remain by far dominant.

Table 5: Dynamics of the number of students by type of university

Indicator	2000	2005	2010	2013	2014	2015	2016	2017
Total	40,125	63,257	122,326	172,561	173,819	160,527	146,756	139,607
Public	40,125	62,274	98,917	139,034	142,707	136,419	121,638	115,093
Private	-	983	23,409	33,527	31,112	24,108	25,118	24,514
Share Private/Total	0%	2%	19%	19%	18%	15%	17%	18%

Source: INSTAT (2018)

3. Sector description – Agriculture, fishery and agro-processing

3.1 Sector contribution

Agriculture and food production play an important role in the Albanian economy. The sector generates about 1/5 of the GDP - it has been also one of the main employing sectors. Agro-processing has expanded significantly during the last 10 years. The turnover has grown by 3 percent and employment by 3.3 percent on average per year during the late 2000' and early 2010'. Agro-processing sub-sector employs around 11,300 people in formal jobs and many more informally, especially during harvesting season (there are not available accurate statistics). Young people constitute the majority of the working force (65 percent of these jobs are filled with young people under 30, while 70 percent of them are young women), mostly unskilled manual workers, employed for sorting, grading, processing or packing products. The sector has a considerable multiplier effect since 100,000 are indirectly employed through supply chains especially in rural areas. In general, bakery, milk and meat processing are the sectors with the

largest number of employees. Some sub-sectors, such as meat processing, wine, canned fruit and vegetable, fish, etc., have experienced a significant growth during the last decade. Other sectors have stagnated or have grown at a slower rate (Gerdoci, 2016).

In the fisheries work approximately 1,000 persons - a major part is self employed. Fisheries and aquaculture have been characterized by low investment; therefore it is not expected to have major changes at employment levels in the immediate future (Bakiu, 2016).

3.2 Skills needed

In the agriculture sector, the most demanded services, usually outsourced, are related to production activities such as: extension service on plant protection, agronomic practices, choice of variety, use of inputs, animal health, artificial insemination, etc. Large farms, depending on type of production and level of integration, have specific needs; grafting for example, although a seasonal work, is in high demand by many large farmers (DSA, 2012).

In the agro-processing sector there is an evident need for food technologists (with different specializations). Some particular sub-sectors have specific needs. Specialized bakers are very much requested in urban areas as the number of bakeries that offer a wide variety of products is growing steadily.

In the agriculture and agro-processing sectors there is a well-established tendency to recruit most of the staff based on networks of family and friends. Additionally, location plays a significant role in recruitment. Many employees are recruited locally and some technicians, engineers and management staff are recruited in urban or semi-urban areas. Larger firms, especially those located in urban areas, use other recruitment channels such advertisements in national newspapers or labor offices.

On-job training is the most common method used by operators to train their workforce, although other methods are used too. Farmers are usually trained by local and international experts in the framework of capacity building initiatives financed by government agencies or donor organization. Although many farmers and agro-processors consider formal training and coaching as a “luxury” or too theoretical, some success stories are changing the general misconception of enterprise owners, managers and farmers regarding the usefulness of such (well-designed) methods (Gerdoci, 2016).

The Agricultural University of Tirana plays a crucial role in the education and training of the experts in the agriculture sector – it is expected that its role in training and capacity building will increase.

The majority of the people working in the fishing industry is not trained and lacks basic skills, where most of them not having attended even the secondary education. The only trained crew and captains are the ones who have attended the vocational school or the Marine Academy. In several cases, mainly among big businesses, the workaround for the shortage of qualified labor

force is to employ foreign nationals, e.g., Egyptians as fishers and Italian nationals as captains or higher level deck officers (Bakiu, 2016).

4. Sector description – Trade

4.1 Sector contribution

Trade is the second biggest sector after agriculture in terms of GDP and employment. Wholesale and retail trade is the biggest employer in the micro –size businesses (most typically self-employing household businesses).

4.2 Skills

Most of these jobs are unskilled cashier type or unpaid family jobs making the sector unattractive. The trade sector consists mostly of small “mom & pop stores”. This is poised to change however as retail chains are now entering the market. Even though the sector turnover will increase rapidly in the next few years, this might not translate into more jobs (RISI, 2013) – indeed the expansion of international retails chains should result in decreased number of small retails, thereby loss of jobs by this category of operators. “Insufficient knowledge at the time of recruitment” is the most selected reason regarding skills’ shortage in the businesses. In particular, that reason appears to be several times more often occurring in the sectors of wholesale, retail trade and repairing (as well as manufacturing) than in the other sectors (SNA, 2014).

5. Sector description – Construction

5.1 Sector contribution

Construction contributes to almost 8 percent of the Albanian GDP and around 7 percent of the total employment number. The Labor Force Survey 2014 figures indicate that in 2014, 18 percent of the employed in the construction sector belonged to the 15-29 years-of-age group, around 60 percent is up to 35 years old, up to 20 percent is 35-45 years old, and 12-20 percent is 50-60 years old.

According to SNA (2014), the construction sector has a recruiting norm (total number of recruitment over total number of employed in the sector) of almost 20 percent. According to these figures, the construction sector takes the second place on national level (in terms of recruiting norm). The most sought-after professions (in the forecast) are workers, technicians and engineers. It is important to point out that the data belongs mostly to businesses with a range of 5-19 employees, which are considered by SNA (2014) as small businesses.

5.2 Skills

Innovation in technology and product foreseen by companies ought to enlarge the gap between actual and required skills. Some 32 percent of the companies in the construction sector planned to introduce new products, and 26 percent of them planned to adopt new technologies. Only about 34 percent of the companies that planned such introductions also reported an intention to hire new employees. All the rest intended to cover the need through training of existing staff (SNA, 2014). As required by Law, some of them, certified with ISO standards, have to train their employees. This sector employed more individuals with primary and secondary levels of education than the whole economy did (in terms of percentage), and less with high levels of education than the whole economy. This description is applicable not just to 15-29 years-of-age group, but all age groups considered by the study. As most of those employed in *construction* are of primary and secondary education, it is reasonable to discuss how to improve these levels of education. While women work mostly in positions where University education is required (Kasimati, 2016).

SNA (2014) reports that the main reasons for the lack of skills are:

- Lack of knowledge at the recruitment point
- Lack of ‘on-the-job’ training
- Wrong recruitment
- Frequent job change
- Lack of capabilities to learn
- Lack of experience
- Lack of motivation.

Construction enterprises are also currently facing environmental and energy-related issues, putting effort into becoming *greener*. ‘*The sector currently lacks skilled workers capable of meeting the energy resources efficiency challenges*’ (Gishti and Shkreli, 2015).

Professional skills are considered to be the most difficult to find. According to SNA (2014), 42 percent of the businesses in construction (national level) report lack of skills. The main gaps between needed and available skills are reported for “finishing worker”, “mason”, and “construction engineer”. Some professions like: plumber, electrician (erector), plastering grout applier are always in need and will be in demand. The construction industry has vacancies (which have proven themselves difficult to fill) for professional skills like plumber, electrician, grout plasterer. The view in the industry is that the need for these professions will be persistent. On-the-job training is one important way of preparing skilled workers and is applied by the major part of the companies for new materials/technologies, maintaining the ISO standards, as well as training those that were unqualified at the hiring moment (Kasimati, 2016).

6. Sector description - Extractive Industry

6.1 Contribution to economy and employment

Extractive industry for a long time has been an important factor for the economic development of the country. The extractive industry in Albania is represented by a) the industrial oil sector and b) the mining sector, focused mainly on the production of chromium, copper, iron, nickel, bitumen and inert minerals that serve as raw materials in the construction industry. The extractive sector comprised almost 5 percent of GDP, while total exports of the sector have amounted to 1/5 of total exports in the past years. The activity of this sector in Albania is still fragmented, having a low productivity rate and being far from the desired standards; its processing capacities are very low and it involves a high number of informal workers, including children.

6.2 Skills

Most frequent occupations (grouped by ISCO code) with skills' shortages in this sector were mining and mineral processing plant operators, machinery mechanics and repair specialists, and other craft and related workers. AlbChromes whose assets include: chrome ore mines, smelters and metallurgic plants, processing and enrichment factories, chrome concentrate factories, and other mining and metallurgy infrastructure elements, represents a big share of the heavy industry facilities in Albania. According to some mining operators, there is a need for armator, mining explosives worker, markesheder, safety rules, etc (Xhepa 2016).

7. Sector description - Manufacturing (Processing) Industry

7.1 Contribution to economy and employment

The **manufacturing** (processing (non-food)) industry contributes to 11 percent of the GDP as of 2015 (INSTAT, 2016). One of the most important subsectors of this section is **textile and garment**. It contributes the highest share in the maritime exports (40 percent) and provides a large absorption for the labor force. A total of 5,245 businesses are run by foreign ownership or joint ownership. Some 5.6 percent of the total foreign and joint enterprises employ 50 and more staff, and have hired almost $\frac{3}{4}$ of the total employed. Most firms are located in Tirana (38.4 percent), Durrës (17.6 percent), Korça (9.8 percent), and Fier (9.4 percent). The number of employed people in the textile and footwear sector is about 70,000 in total. Education profile of the employed: 5 percent are university graduates; 20 percent have upper secondary education; and 75 percent elementary school education. In terms of *gender* in the textile, 95 percent of the employees in the garment and footwear manufacturing sector are females (*Shehi, 2016*).

The metallurgic industry is represented from the recycling of metal scrap and ferrous chrome production. There is potential for this industry in the metallurgical processes for the treatment of copper and nickel ores. The **mechanical industry** is represented mainly by micro enterprises

with 2-5 employees that produce metal constructions, aluminum products for construction, special spare parts for various industries, etc. Its development is conditioned by the development of infrastructure and construction. The **wood processing industry** is involved in the production of final products (furniture), and the rest in producing sawn materials, employing few thousands employees – there are significant exports of semi-fabricated wood materials. The **chemical industry** is characterized by many small, medium, and large private enterprises, which realize products in the field of chemical industry as paints, detergents, styrofoam, oils, adhesive for building products, etc. The **creative economy** is considered as a promising economic sector with the potential of contributing to the local, regional and national economy, as well as job creation. The contribution of the creative economy in Albania has not exceeded 1 percent of the GDP over the last years, which is much lower when compared to developed countries. In Albania, the creative sector provides few thousand jobs. A large part of the employees in this economy are artisans (Gishti and Shkreli, 2015).

7.2 Skills needed

Table 6 below provides a description of the skills needed by the subsectors.

Table 6: Skills needed by subsector

Subsectors of manufacture	Skills needs
Metallurgic industry	There is a need for workers of metal processing, panel control operators, metal merging worker, observer of the metal melting processes, electro, etc.
Mechanical industry	According to SNA 2014 findings, the most frequent occupation (grouped by ISCO code) with skills’ shortages in this sector was Sheet and structural metal workers, molders and welders. These occupations seem to be really demanded in the labour market especially with the Trans-Adriatic Pipeline (TAP) project development.
Textile and garment	Employers complain that they could not find workers with the skills they need and also skilled workers for certain work processes, such as: mechanics for textile machines, production supervisors, quality controller, cutters, modelers and fashion designers.
Creative economy	A considerable number of artisans have a family history of that same activity as a background. This number accounts for more than 60 percent. Most of artisans with few exceptions do not have a formal education in arts, traditional culture or handicraft. Main products consist in wooden artistic carvings, carpet and rugs, ceramics, filigree, copper and silver decorative products, etc.

Source: Gishti dhe Shkreli (2015)

In the case of garment and leather, according to the SNA 2014 findings, the most frequent occupations (grouped by ISCO code) with skills’ shortages in this sector were textile, fur and leather products machine operators, garment and related trades workers. The garment sector is a special case since it has great potential for absorbing new labor force especially for women. A survey for skill assessment was part of the Competitiveness Improvement of the Garment Manufacturers Project (funded by USAID (as cited by Shehi, 2016)). This survey showed that the most needed skills for the sector are: pattern makers, designers, multi skilled sewing operators and machine maintenance technicians.

In terms of practices used by firms to hire and train employees, it results that there are three categories of firms:

1. Firms that practice a full training program for their operators (inside or outside the firm).
2. Firms that practice operators’ training after recruiting (inside the firm)
3. Firms that practice training of operators in vocational training centers.

Companies that have the ability to efficiently manufacture a wide range of products will be more capable of surviving this difficult time for the industry. A vital attribute for these companies will be well-trained flexible employees and management. Operators lack qualification and skills, usually in the smaller firms (Shehi, 2016).

8. Sector description - Energy

8.1 Contribution to economy and employment

The energy sector is an important contributor to the country’s economy, economic growth and employment, either through the direct contribution or indirectly by providing the necessary energy to all sectors. The development of the energy sector is one of the most promising, both in terms of potential and of domestic demand. Energy generation is mostly dominated by public corporation KESH, which has in its administration all hydropower facilities built during the communist regime. Transmission and distribution are owned by the government and are by far the largest contributors to employment. The main form of the business model is “build and operate” power plant (Xhepa, 2016).

Energy is one of the development priorities of the Government, but it is not labor intensive due to the use of advanced technology (ETF, 2013). Thus, the high number of small hydropower plants in operation or under construction employs few people (e.g. many employ less than 10). Employment by the industry is calculated to about 2 percent of the total employment of the non-agriculture private sector. “Electricity and gas ” sector has also a quite high percentage of businesses that plan to invest in new technologies and foresees new recruitments. The lack of qualifications of the professional staff in some highly qualified professions, and complete lack of

their availability, requires adequate response from the education sector, both from the VET providers and universities as well.

8.2 Skills

Occupational profiles are dominated by electrical engineers and professional electricians. This group of professionals accounts for up to 80 percent of the total labor force in a medium- to a large-scale plant. Other professional groups include managers, accountants and financiers, etc. Private operators require the majority of the professionals to hold at least a bachelor degree. In some cases (for example Devoll HPP) around 65 percent of the engineers hold a post graduate (Master’s) degree. This is the case in most of the private companies, especially in large projects owned and operated by foreign investors. For low profile positions companies do not employ staff other than from professional schools. This is the case of the public operator for the technical staff employed in the maintenance and customer services (Xhepa, 2016).

There is a strong need for the qualification and requalification of the professional staff as confirmed by the private sector and new projects which apply new technologies. Some professions cannot be found in the domestic market, such as managers on health and safety or on safety standards (this is relevant for other sectors too). There is a complete lack of professionals on financial management specialized on energy products, experts on mapping or GIS systems (Xhepa, 2016).

In terms of qualifications of the labor force, a study on the needs assessment of the quality of education (ETF, 2014) concludes that:

- Unsuitable qualification level of the labor force is a concern for almost all the sectors of the economy.
- Loss of professional skills due to long-term unemployment is a relatively high concern for the sector of electricity, gas, etc. (as well as Real Estate). This could be linked with the technological advancements that might be difficult to be followed by them.
- High fiscal burden regarding employment results to be a concern for the sector of electricity and gas. Skill shortages are mentioned for process control technicians and electrical equipment installers and repairers

9. Sector description – Tourism

9.1 Contribution to economy and employment

Tourism contributes to about 5 percent of the total employment as well as GDP. Most firms in this sector are micro or small enterprises (with fewer than 8 people employed) and the sector shows high seasonality in employment. Public employers include about 7 percent of the total, but all the positions are institutional (such as museum managers or archeologists) - thus, private businesses make up for most employment in the sector. About 80 percent of all businesses are in the services profiles (hospitality, food and beverage, accommodation), with the rest being a

combination of travel agencies, other booking services, transportation, and agro-tourism (Kristo, 2016).

Employment in tourism has increased significantly year after year and is expected to further increase as it is expanding in Albania. This includes employment by hotels, travel agents, etc., as well as activities of restaurants and leisure industries directly supported by tourists. Many businesses have plans to expand their businesses, both in size and scope. There is a need for qualified labor – this need will be growing in the context of further professionalization of the sector.

9.2 Skills needed

There are 5 programs offered in Albanian VETs for tourism skills: **1.** Culinary; **2.** Food and beverage service; **3.** Tourism; **4.** Reception; **5.** Travel guide.

The actual education system and the tourism curricula do not accomplish the quality requirements of the industry of tourism. University courses are mostly focused on delivering theoretical skills and thus skip the vocational orientation and fail in meeting the industry’s needs. Enrollment in tourism profiles seems to be more attractive to male students, with hospitality being the most preferred degree, with 75 percent of all students enrolled across the 6 profiles. The geographical distribution of tourism students across the nation reflects the quality of schools in the VET system. Tirana, with its hospitality school, enrolls 27 percent of all students nationwide, followed by Durrës at 19.6 percent (Kristo, 2016).

10. Transportation and storage

10.1 Contribution to economy and employment

The transportation and storage sector has generated 3 percent of the national GDP and 5 percent of the national employment. The contribution to GDP has experienced a strong negative trend in recent years, mainly affected by the economic downturn. Employment stability is linked to self-employment and reduced informality in the sector. Land and pipeline transportation has the highest contribution to the sector economic activity. The sector is mainly concentrated around the capital city, sea ports and cities with cross border points (Agolli, 2016).

While road and rail transport are important activities in the transport industry, their actual and near future contribution to labor market opportunities is not expected to be that high.

10.2 Skills

The evolution in technology has also altered and transformed jobs in transportation, e.g. computerized platforms raising the need for skilled people in the sector. These technological changes have influenced the creation of job opportunities for youngsters or women. Such jobs nowadays might be attractive for a wider group of people including youth, especially in the case

of jobs related to logistics or management. The firms representing the transportation and storage sector in the SNA (2014) manifest a low propensity to engage in staff development programs.

11. Sector description - ICT

11.1 Contribution to the economy and employment

The weight of the sector is at 3.3 percent of the GDP (Ktona and Karapici, 2016). According to Stefanllari et al (2014) and Zitnik (2012), until 2011 the Albania IT market increased 5.5 percent per year.

In 2014, the main partner for imports of ICT products was China with an increase of 5 percent from 2013 (Stefanllari et al, 2014). Some 57 percent of IT companies employ 1-10 employees; 38 percent have hired 11-50 employees; and 6 percent are companies with more than 50 employees. The major constraint to business growth and upgrading in the field of IT and software development, in particular, is the weak domestic demand for IT services considering that there are 4,000 IT graduates entering the labor market each year (Ktona and Karapici, 2016).

11.2 Skills needed

According to IPSED study (2014), the main positions for medium level technicians are required for web designers, network maintenance technicians, and help desks operators – these positions are mostly filled by vocational or general secondary-school graduates that are passionate in computer science and information technology. While other positions, such as system engineering, web programming, database programming, application development, network managing, banking IT, finance, etc., are mostly filled by university graduates, followed up by an intense training financially covered by ICT companies (Ktona and Karapici, 2016). The ICT sector is gender-balanced and offers to women good opportunities to advance in their career. 12. Main relevant cross-sectoral and regional patterns

Referring to the SNA (2014) the major part of the employment in the Albanian economy is (in addition to the agriculture sector) in the manufacturing and wholesale, retail trade and repairing sectors followed by construction, accommodation and food sectors. About 60 percent of the Albanian employment is concentrated in the Central Region, while the lowest employment share is located in the Southern Region. Manufacturing, administrative support and support services sectors are the biggest employers in the large size businesses where garment and footwear industry and call center services are the biggest employers within the large businesses group. Wholesale and retail trade is the biggest employer in the micro –size businesses.

Agriculture remains the largest employer in Albania. It is also the most informal sector since the majority of the labor force is based on a very fragmented structure. In rural areas it is the main

source of income while in urban areas manufacturing and trade, and services are the most promising sectors.

The following table summarizes the patterns in the Albanian enterprises according to the NVE 1 subsectors.

Table 7: Distribution structure of the Albanian enterprise by size (year 2014)

Economic Sector		% by column				% by row			
		Micro	Small	Medium	Large	Micro	Small	Medium	Large
B	Mining and quarrying	0.2	1.6	3.8	4.7	1.3	14.1	31.2	53.5
C	Manufacturing	13	11.5	25.7	33.9	8.9	13.1	27.6	50.5
D	Electricity, gas, stream...	1.4	0.3	0.5	6.2	8.5	3.5	5.3	82.8
E	Water supply, sewerage, waste...			3	5.4			28.4	71.6
F	Construction	3	13.1	17.3	7.2	4.4	32.2	40.2	23.2
G	Wholesale and retail trade, repair...	40.7	26.8	15.4	7.2	32.4	35.7	19.3	12.6
H	Transportation and storage	1.2	2.7	6	2.9	5.5	21.1	44.1	29.3
I	Accommodation and food service	20.3	22.8	4.3	1.4	29.7	55.8	10	4.5
J	Information and communication	2	3	1.7	3.3	11.6	30	15.8	42.5
K	Financial and insurance activities	2.1	1	0.3	9.3	8.6	6.5	2.2	82.6
L	Real estate Activities		0.7	0.7			48.9	46.5	4.6
M	Professional, scientific and technical	7.2	3.2	7.1	1.2	27.5	20.3	42.5	9.8
N	Administrative and support service	2.2	3.2	7	12.4	4.9	11.5	24.2	59.4
R	Arts, entertainment and recreation	0.1	1.8	2.1	3.3	0.4	22	24.5	53.1
S	Other services activities	6.5	8.2	4.9	1.7	20.6	43.2	24.5	11.8
	Total in %	100	100	100	100	15.5	25.9	24.5	34
	Total in numbers	49,651	82,926	78,341	108,820				

Source: SNA (2014)

Almost all companies address the skills' shortage of the existing employees. While staff replacement is the most used action for the micro-size group, increased training is the most utilized action for the large size group. However, contracting vocational schools, centers or universities for trainings is very rarely considered by businesses. The private businesses themselves resulted to be the main funders of the training for all groups of professions. The major part of medium and large size companies has its own training structure and about one third of them has a separate training budget item.

In the current economic environment of Albania, the small size business (having 5-19 employees) seems the most prospecting format in terms of employment. It has the largest number of anticipated new recruitments, the highest new recruitments rate and the lowest score regarding the level of difficulty to hire.

Professional skills and work experience are the skills/requirements most often considered as difficult. On the other side of the spectrum “Reading and writing skills”, “Outer appearance“, “Gender”, “Insufficient salary at the company” and “ Uninteresting working conditions” are very rarely a difficulty or a significant barrier for hiring people in the required profession.

Acquaintances, relatives and friends and announcements in newspaper, job portals, and companies’ websites are the most used recruitment method by the companies. While acquaintances, relatives and friends is the dominant method for all regions, there are differences between the regions regarding the relative share of the used methods.

Companies surveyed by the SNA (2012) reported that the required level of professional competence and work experience is very difficult to be found within the category of specialists at operational level, outlining clearly what companies expect from graduates from the post-secondary VET programs. The *ETF 2012 Sector Skills Needs Analysis in Albania* gave an overview over the key economic sectors and of the available situation of skills and occupations in important sectors of the economy. A list of qualifications was included, focusing on the main ones for which businesses had declared a need and which should, hence, be offered through initial vocational education or continuing vocational training. The study indicates that skill gaps exist in almost all interviewed businesses for many qualifications. For some of the industries, the skills’ gap is considered problematic not only for the current operation of the businesses, but particularly for the future when advanced technologies put higher requirements on employees’ skills. The most critical sectors regarding the skills’ gap resulted to be the manufacturing industry, construction, hotels, bars and restaurants as well as the car service industry.

Furthermore, the *2014 Gender Sensitivity Report on Skills Gaps in the Agro-processing, ICT and Tourism Sectors in Albania by the Institute for the Promotion of Social & Economic Development (IPSED)*, funded by the Swiss-supported RISI Albania project, undertook an analysis of the private sector needs, characteristics of identified target groups, and the skills’ supply and gaps in three priority sectors in Albania. The report identified the most needed occupations: how companies fill these positions; the mismatch between what the labor market demands and what training providers offer; the quality of their curricula and practical experience offered; and internship programs and how students benefit from them, etc.

The main findings of the *2014 Skill Needs Analysis by the NES*, undertaken with support from the RISI Albania and ILO-IPA 2010 HRD projects, include:

- Unsuitable qualification level of the labor force is a concern for almost all the sectors of the economy, but it is a particularly strong concern for three sectors including “ining and quarrying”, “Electricity, gas, etc.” and “Real estate”. This proves once more the

conclusions from previous studies that companies increasingly lack people with technical skills or in technical occupations, which are not necessarily preferred occupations by youngsters. ‘Loss of occupational skills due to long-term unemployment’ is a relatively very high concern for the sectors “Electricity, gas etc.” and “Real Estate”. This might be linked with the technological advancements that might be difficult to be followed by them;

- ‘Low salaries’ is a major concern for 47 percent of businesses in the “Water supply, sewerage, waste” sector. Many of these companies are owned by local government units and this might be the reason that the salaries are lower than in private companies; ‘Work culture’ reaches the highest level of concern for the Sector “Administrative and support services”; ‘High fiscal burden regarding employment’ results to be a concern for the sector of “Electricity and gas,”.
- In the category of large businesses, most of the people are employed in the “Manufacturing” and “Administrative and Support Service” sectors, accounting for 33.9 percent and 12.4 percent, respectively, of the total number of employees in all large businesses. The Garment and Footwear (fason) industry and Call Centre services are the biggest single employers within the group of large businesses. In the category of micro businesses, most people are employed in the “Wholesale and retail trade, repair” and “Accommodation and food service” sectors, making up for 40.7 percent and 20.3 percent, respectively, of the total number of employees. Latest developments show that great attention is being cast on the Garment and Footwear industry, considered as one of the biggest employers in the country. This industry benefits from the fact that the labor force is more competitive (considerably cheaper) than in other countries.

In terms of Regions, the Southern Region has the highest rate of businesses not satisfied with the skills of their employees. The Northern Region deficiencies are more related to the professions in production, mining and construction industries. The Central Region deficiencies are more related to the service sector, while Southern Region is more related to the sectors of services and construction. In terms of sectors, lack of relevant skills to the current employees seems relatively very high for the sectors of Water Supply, Sewerage, Waste and Mining and Quarrying. The waiters, bartenders, cooks, and hostesses in most cases lack the communication skills while sales workers lack the ability to work in team. The Building and Related Trades Workers (excluding Electricians) do not have sufficient work experience.

13. Conclusions

Unemployment is one of the major socio-economic challenges faced by the Albanian society, which is more common among young – unemployment is also one of the drivers behind mass migration. Even though officially there has been reported decreased unemployment, the unemployment rate in Albania (for the age-group 15-64 years old) is high, especially among the youth. Education does not result to improve the chances for employment, posing serious questions about education quality and its gap with the labor market needs.

The Albanian labor market has changed dramatically during the recent two decades. A part of skills existing in the market turned to be obsolete and no longer in demand, whilst new skill requirements have emerged as a result of technological developments and innovation, labor force mobility etc. In addition, a deep mismatch between skills demanded by the business and the ones provided by the workers has been occurring in Albania, mainly due to the education performance and structure, which has been causing gaps in the labor market.

Considering the above developments, the Albanian Government (AG) adopted an Employment and Skills Strategy 2014-2020 in order to achieve a competitive economy and an inclusive society that are built on: “Higher skills and better jobs for all women and men”. Great importance is attached to the linkage between employment and the VET system focusing the governmental actions on facing this challenge.

A strengthening education system is expected to contribute towards the reduction of unemployment, especially among youth, which is important also in the context of Albania’s EU integration. Albania is country in transition whose main priority is the EU integration. In June 2014 Albania was granted the EU candidate status, the first step towards full EU membership. The Government of Albania strategic vision is to turn the country’s economy from low productivity, informal and import-dependent to modern, innovative and highly productive. Strategic priorities of the government are articulated in the National Strategy for Development and Integration (NSDI 2014-2020).

As highlighted, this study is an overview based on desk research. There have been various studies on employment, skills for jobs etc funded/implemented by different agencies – despite the useful information that they provide, one can observe lack of comparability in terms of scope, timing and approach followed by such studies.

In order to strengthen the linkages and orientation of the education market towards the labor market requirements, it is necessary to monitor the employability of graduates across disciplines, sectors and educational institutions or study programs. This is also the aim of the GRADUA project – to establish a platform to fill in this gap, by using a combined set of tools to collect and process information about students and graduates position in relation to the labor market.

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