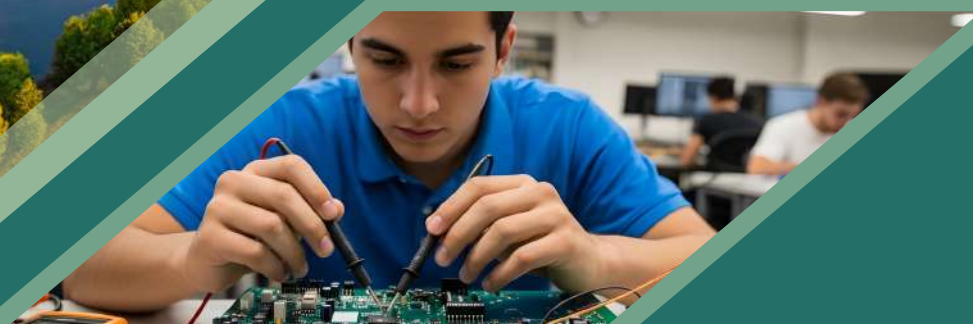




ALIGNING CLIMATE AMBITION AND WORKFORCE DEVELOPMENT IN MOLDOVA

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EXECUTIVE SUMMARY

Climate policy in the Republic of Moldova has entered a decisive phase, where implementation capacity (not ambition) will determine outcomes. Moldova's third Nationally Determined Contribution (NDC 3.0) sets out an ambitious decarbonisation pathway aligned with the country's European Union (EU) accession trajectory. It reflects a clear shift towards embedding climate objectives within broader economic and institutional transformation. However, the success of this framework will depend on Moldova's ability to translate strategic commitments into operational delivery.

This report assesses NDC 3.0 through a human capital lens, examining whether existing skills systems, labour market institutions, policies and governance arrangements are equipped to support implementation and to meet EU acquis Chapter 27 requirements. It finds that Moldova has made notable progress in integrating human capital considerations into climate policy. Education, labour and social protection institutions are formally included in governance structures, and skills and workforce adaptation are recognised as important enabling factors.

At the same time, this integration remains largely strategic rather than operational. Workforce considerations are not systematically embedded in the technical design of climate policies, and coordination mechanisms remain insufficient to translate targets into concrete skills and employment outcomes. Labour market intelligence systems do not yet provide the data needed to anticipate green skills demand, while education and training systems face structural constraints that limit their responsiveness. Climate-related investments continue to prioritise infrastructure over workforce development, while labour market participation gaps reduce the effective labour supply available for transition-relevant sectors.

These weaknesses are already affecting implementation. Skills shortages in key sectors (including energy, construction and manufacturing) are constraining the delivery of climate objectives and risk slowing progress towards EU alignment. Without stronger integration of workforce planning into climate policy, Moldova faces a growing gap between ambition and delivery, with direct implications for the transposition and enforcement of the EU environmental acquis.

Addressing this gap requires a shift from formal recognition of human capital to its systematic integration into climate governance and financing. This includes embedding skills considerations in sectoral policy design, strengthening labour market intelligence, accelerating the adaptation of education and training systems, and ensuring that workforce development is explicitly funded as part of climate action. Greater attention to inclusion and just transition will also be essential to expand the available skills base and maintain social and political support for reform.

Moldova's NDC 3.0 provides a credible strategic framework. Its delivery, however, will depend on whether human capital is treated as a central implementation priority rather than a supporting measure. Without this shift, climate ambition risks outpacing institutional and workforce capacity, undermining both policy effectiveness and EU accession objectives.

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1. PURPOSE AND SCOPE

Climate action has reached a critical juncture, driven not only by escalating climate risks but also by concerns relating to air pollution, energy security, economic competitiveness and the requirements associated with European Union (EU) accession. Against this backdrop, this report examines how the Republic of Moldova intends to operationalise its ambitious decarbonisation commitments. In line with its mandate, the European Training Foundation (ETF) undertook a mixed methods analysis of Moldova's Nationally Determined Contribution (NDC), combining quantitative evidence with qualitative insights from in-country interviews, to support national authorities and stakeholders in identifying credible pathways that jointly advance emissions reduction and fair employment creation. Particular emphasis is placed on the workforce dimension of the transition, assessing how just transition principles, strengthened skills intelligence and targeted reforms in education and training systems can enhance preparedness and support inclusive, sustainable economic transformation.

This report is structured as follows: section 2 explains the role of NDCs under the Paris Agreement and summarises Moldova's NDC 3.0, including its level of ambition in a regional perspective; section 3 reviews key relevant policies and assesses their implications for human capital development, including skills, education and employment; section 4 outlines the methodology and stakeholder engagement underpinning the analysis; section 5 presents findings from the interviews, highlighting perceived challenges and priorities for workforce readiness and coordination; section 6 discusses the main gaps and opportunities for better aligning climate ambition with skills and labour-market systems; section 7 concludes with concise policy pointers; and the annexes provide supporting materials and references.

2. METHODOLOGY AND STAKEHOLDER ENGAGEMENT

2.1 Methodological approach

This report adopts a mixed-methods approach combining documentary analysis, stakeholder consultations and targeted textual analysis to assess the integration of climate objectives and human capital considerations in Moldova's transition pathway.

First, a comprehensive desk review was conducted covering national and sectoral policy documents, including climate strategies, education and training frameworks, labour market policies and skills foresight exercises. This review was complemented by relevant statistical data, academic literature and analytical reports. It provided an overview of the institutional, regulatory and policy landscape governing climate action and workforce development and enabled an assessment of the extent to which existing frameworks are aligned with the objectives of NDC 3.0.

Second, qualitative data were collected through semi-structured interviews with key national stakeholders. Eight interviews were conducted with representatives from government institutions, social partners and international organisations. The interviews explored perceptions of climate ambition, implementation challenges, institutional coordination, skills needs and workforce readiness. This component provided insights into how policies are interpreted and implemented in practice, as well as into constraints that are not always visible in formal policy documents. The interview data were analysed thematically to identify common patterns and divergences across stakeholder groups.

Third, a targeted text analysis of the NDC 3.0 was conducted to identify where and how human capital dimensions (skills, education and training, employment, inclusion and just transition) are articulated in the document. The NDC text was converted into a searchable file and analysed using a structured keyword protocol grouped into thematic clusters (e.g. skills/training; jobs/employment; inclusion/social protection; stakeholders/social dialogue). For each cluster, we recorded keyword occurrences and reviewed concordance lines (keyword-in-context excerpts) using AntConc to verify meaning and to distinguish general statements from operational content. This corpus-assisted approach follows established corpus-assisted discourse studies methods in which corpus tools support (but do not replace) qualitative interpretation of policy texts (Baker, 2006; Partington et al., 2013; Taylor and Marchi, 2018). The resulting evidence was then mapped to the relevant NDC sections (targets, measures, governance and implementation arrangements) to clarify how workforce considerations are framed and whether they are linked to delivery mechanisms.

Findings from these three sources were systematically compared and triangulated. This approach allows for a more comprehensive understanding of the relationship between policy commitments, institutional arrangements and implementation realities, strengthening the overall validity of the analysis.

Among the stakeholders interviewed was one representative from each of the following organisations:

- Government authorities and agencies: Ministry of Environment (MoE), Ministry of Education and Research (MER), Ministry of Labour and Social Protection (MLSP), National Agency for Employment (ANOFM), and the Organisation for Entrepreneurship Development (ODA);
- Social partners: National Confederation of Employers of Moldova (CNPM) and the Chamber of Commerce and Industry of the Republic of Moldova (CCI);
- International organisation: International Labour Organization (ILO), Moldova office.

2.2 Limitations

This study was conducted within practical constraints relating primarily to time and resource availability, which shaped the division of labour between the ETF and locally recruited experts. In-country data collection and stakeholder interviews were conducted in person and carried out by national experts. The study was not able to interview the authors of Moldova's NDC 3.0, which would have provided valuable insights into drafting choices, evidence inputs, and how human capital considerations were intended to be operationalised during implementation.

A further limitation concerns the use of EU concepts, classifications and policy language as reference points for assessing climate governance and workforce readiness in the context of accession (notably Chapter 27). While these frameworks provide an important benchmark, they do not always align neatly with local institutional arrangements, terminology and policy practice in Moldova. Differences in translation, as well as conceptual interpretation of terms such as 'green skills', 'just transition' or 'skills anticipation', may therefore introduce ambiguity and affect how comparable certain statements are across documents and stakeholders. Where possible, this risk was addressed by cross-checking terminology across sources and prioritising locally grounded interpretations provided during interviews and in national policy texts.

Finally, interviews were conducted with a purposive sample of eight stakeholders in Moldova, selected to capture key institutional perspectives across government, social partners and international organisations. While this sample provided informed and relevant insights, it represents only a subset of the broader ecosystem of actors involved in climate action and human capital development; findings should therefore be interpreted as indicative rather than exhaustive. To mitigate these limitations, evidence from the interviews was triangulated with policy documents, statistical data and analytical sources, allowing for consistency checks and validation across qualitative and quantitative inputs.

3. NATIONAL CLIMATE COMMITMENTS: WHAT THE NDCS SAY AND WHY THEY MATTER

3.1 Why NDCs matter

Under the United Nations Framework Convention on Climate Change (UNFCCC), commitments to reduce greenhouse gas (GHG) emissions are articulated through Nationally Determined Contributions (NDCs), which are updated on a five-year cycle and, since 2024, supported by Biennial Transparency Reports. While NDCs are formally centred on mitigation and adaptation, they have progressively evolved into broader instruments of sustainable development, integrating environmental, economic and social objectives. The current NDC cycle (NDC 3.0) reflects this evolution by placing stronger emphasis on long-term transformation pathways aligned with the 1.5 °C temperature objective (UNFCCC, 2024).

NDCs matter for skills, jobs and systems planning because they translate climate ambition into forward-looking sectoral trajectories that shape future labour demand, influence public and private investment decisions and provide a strategic reference point for aligning education, training and employment policies with decarbonisation and adaptation objectives (UNFCCC, 2024). By signalling anticipated structural shifts in production systems and technologies, NDCs create expectations about emerging occupations and competencies, thereby offering an institutional anchor for human capital development and workforce planning (ILO, 2025).

By articulating mitigation and adaptation priorities across sectors, NDCs can function as coordination devices for skills anticipation, enabling labour-market and education institutions to plan reskilling and upskilling interventions ahead of technological and industrial change, thereby reducing skills mismatches and transition frictions (ILO, 2017; Cedefop, 2018). When explicitly grounded in just transition principles, NDCs further link climate ambition to employment strategies, social protection and inclusive growth, positioning climate policy as a potential driver of decent work rather than a source of labour-market disruption (Glynn et al., 2020). However, this coordinating function is not automatic: where climate targets are weakly embedded in education, labour-market and skills governance frameworks, NDCs remain largely declaratory, with limited capacity to support policy coherence or effective socioeconomic transformation.

3.2 Overview of Moldova's NDC

Moldova's third iteration of its NDC (thereafter NDC 3.0) sets out an economy-wide decarbonisation pathway aligned with the 1.5 °C temperature objective and situates climate action within a broader framework of economic transformation. The document establishes quantified mitigation targets across multiple time horizons, building on a substantial emissions decline already achieved. Net GHG emissions were 69.5 % below 1990 levels by 2022 (GoM, 2025a; GoM, 2025b, pp. 46–47), with commitments to reduce emissions by 71 % by 2030, 75 % by 2035, and to reach climate neutrality by 2050.

Mitigation efforts are primarily concentrated in the energy sector, which accounted for 69.2 % of national net direct GHG emissions in 2022 (GoM, 2025b, p.47), while the NDC adopts an economy-wide scope covering all major emitting sectors. Defined mitigation contributions are identified for waste (10.8 % of emissions), agriculture (10.1 %); industrial processes and product use (6.7 %); and land use, land use change and forestry, which functions as a net carbon sink (3.2 %) (GoM, 2025b). This sectoral distribution links emissions reduction objectives with energy system transformation, land management practices and ecosystem functions.

The NDC is embedded within a broader policy and legislative framework that integrates climate objectives into national economic governance. It reflects a shift from sector-specific environmental

interventions towards an integrated approach in which decarbonisation targets are supported by legally binding commitments and long-term planning horizons. Alignment with European regulatory frameworks is reflected in the transposition of key elements of the EU climate governance architecture, including provisions relating to emissions monitoring, renewable energy deployment and market-based instruments, alongside the adoption of the EU Taxonomy, waste hierarchy principles and national adaptation strategies to support climate-related investment and resilience planning (GoM, 2025b).

Given the heterogeneity of NDC structures and the varied ways in which human capital themes are articulated explicitly or implicitly and across multiple sections, corpus-based tools and discourse analysis were used to ensure systematic identification and interpretation of relevant content. The Moldovan NDC presents a well interconnected discourse around human capital and demonstrates a high degree of maturity in embedding human capital related concepts within its climate strategy. The text associates skills, training, capacity development and social inclusion with climate objectives in multiple sections, and these references often appear in actionable or governance-relevant contexts. While this does not assess implementation or ambition, it does show that human capital plays a meaningful role in the way Moldova articulates its climate strategy.

3.3 Regional perspective

In a regional context in which NDC targets often remain less stringent, Moldova stands out for the scale and pace of its stated emissions reductions. Its NDC 3.0 commits to an economy-wide reduction of GHG emissions of 71 % below 1990 levels by 2030 and 75 % by 2035, positioning it as more ambitious than those of its direct neighbours and comparable transition economies, including Ukraine (65 % by 2030); the European Union/Romania (at least 55 % by 2030); Armenia (40 % by 2030); and Georgia (35 % unconditionally by 2030) (UNFCCC, 2026). Beyond headline targets, ETF analysis highlights that Moldova's ambition is reinforced by early submission, legal anchoring through the 2024 Climate Action Law, and explicit integration of just transition and human capital considerations, strengthening the credibility of its long-term decarbonisation pathway relative to regional peers (ETF 2026; Government of the Republic of Moldova, 2025).

4. CLIMATE POLICIES AND INDUSTRIAL GOALS: IMPLICATIONS FOR HUMAN CAPITAL

4.1 Key national climate and green transition policies

Moldova's climate governance framework is designed to enable a whole-government approach by centralising strategic authority at the highest executive level (GoM, 2025b, p.29). Established by Government Decision No 425 of 12 June 2024, the National Commission on Climate Change (NCCC) functions as the primary inter-institutional coordination and oversight body under the authority of the Prime Minister, distributing climate mandates across nine ministries to ensure systematic integration of climate objectives into sectoral policies and operational plans.

Within this framework, the Ministry of Environment acts as the lead authority for climate policy, responsible for developing the legal and normative architecture of the green transition and for managing Moldova's commitments under the Paris Agreement, while its subordinated agencies oversee GHG inventories, transparency reporting and the implementation of climate-related projects to ensure measurable and verifiable progress towards the 2030 and 2050 targets. Climate data production is complemented by the National Bureau of Statistics, which provides independent, evidence-based inputs essential for climate planning and forecasting.

Human capital dimensions are embedded through the full participation of the Ministry of Education and Research and the Ministry of Labour and Social Protection in the NCCC, with mandates covering skills development, education system modernisation, labour market adjustment and social protection in support of a just transition (GoM, 2025b, pp. 64–69). Climate objectives are further mainstreamed into public finance through the Ministry of Finance, which leads NDC financing, climate budget tagging and expenditure tracking, thereby aligning fiscal policy, investment planning and workforce considerations within a single integrated governance model (GoM, 2025b, pp. 25–27).

Moreover, to align with the requirements of Chapter 27, Moldova is engaged in a process of legislative transposition and institutional reform aimed at meeting European Union environmental and climate standards. This effort involves adapting the national legal framework to cover high-complexity areas such as waste management, water quality and industrial pollution control. A primary component of this transition is the bilateral screening process, whereby the European Commission evaluates the degree of alignment between Moldovan statutes and the EU's *acquis communautaire*. Administratively, the state is tasked with enhancing its monitoring capabilities and enforcement mechanisms to manage GHG emissions and biodiversity protection. While strategic frameworks like the Environmental Strategy 2030 outline these objectives, practical implementation remains a technical challenge requiring significant infrastructure investment and the strengthening of administrative capacity at both national and local levels. Furthermore, these reforms necessitate a substantial investment in human capital, as the complexity of the EU environmental *acquis* requires a specialised workforce capable of technical monitoring, environmental auditing and managing high-tech sustainability projects (European Commission 2025).

At sectoral level, although the Integrated National Energy and Climate Plan of the Republic of Moldova 2025–2030 recognises innovation and competitiveness as enabling conditions for the energy transition, it does not explicitly address skills development or labour-market implications in the energy sector. In particular, the Plan does not identify workforce needs, skills gaps or institutional mechanisms to support training and reskilling in line with the scale and pace of the planned energy system transformation (Government of the Republic of Moldova, 2025).

4.2 Human capital development and climate commitments

A review of policy coherence indicates a misalignment between the high-level commitments articulated in NDC 3.0 and the operational frameworks governing the labour and education sectors. While the Law on Climate Action (2024) establishes a long-term decarbonisation horizon of 2050, labour-market and education strategies have evolved at a different pace, resulting in a sequencing gap between climate objectives and workforce-related instruments. For example, the National Employment Programme (2022–2026) of the Ministry of Labour and Social Protection remains in force until the end of 2026, with the integration of green skills foreseen only in the subsequent 2027–2030 programming cycle; implementing bodies such as the National Agency for Employment (ANOFM) currently have limited scope to shape education, training and social protection measures in response to decarbonisation requirements.

By contrast, the Ministry of Education and Research has more explicitly integrated green transition objectives into its strategic frameworks, notably the Education 2030 Strategy and the National Smart Specialisation Programme for 2024–2027. These frameworks have informed the development of ‘green modules’ aimed at mainstreaming transversal competencies, such as efficient resource use, waste management and the safe handling of hazardous substances, across existing VET curricula. Implementation has been supported through curriculum guidance, teacher training initiatives and business–education dialogue platforms, including the Chamber of Commerce-led Greening VET working group, as well as through donor-supported investments in micro-qualification programmes. In parallel, specialised adult training programmes have been introduced at institutions such as the Centre of Excellence in Construction and the Centre of Excellence in Energy Efficiency.

The Ministry has also set a target to update 130 of the 250 active vocational programmes with mandatory green and digital standards by 2027. However, curriculum reform alone does not fully address structural constraints within the system. Persistent technological gaps (linked to outdated equipment in many vocational schools (ETF, 2023)) limit the capacity of training providers to deliver instruction aligned with technologies used in modern green industries. In this context, closer engagement with the private sector through dual education, work-based learning and industry partnerships plays a compensatory role by providing learners with access to current equipment, production environments and applied skills. At the same time, these reforms need to be complemented by adult learning provision, as much of the transition will depend on reskilling and upskilling the existing workforce, rather than simply training the next generation.

In this regard, ETF’s recent mapping shows that Moldova has established a unified legal framework for adult learning within a lifelong learning approach, supported by regulated provision through schools and adult education centres. This provides an institutional basis for short-cycle reskilling and upskilling pathways that can respond to transition-related needs in sectors subject to rapid technological change. However, the available evidence remains largely descriptive and does not yet assess participation levels, quality, financing or the extent to which adult learning provision is aligned with labour-market demand and sectoral transformation priorities (ETF, 2025).

Support for enterprises and their workforce is primarily channelled through business associations or programmes implemented by the Organisation for Entrepreneurship Development (ODA), notably under the Grow SME (Crește IMM) initiative. Greening is treated as a transversal eligibility criterion, with grant intensity increased from 40 % to 50 % for eco-compliant investments. In 2025, this support covered 46 SME greening projects and 119 re-technologisation projects, corresponding to a total allocation of MDL 105.7 million and affecting 3 327 existing jobs. Despite this scale of investment, only a limited share of supported projects – approximately 3.3 % – included expenditure on staff training. Interviews with employer organisations indicate that SMEs’ awareness of climate transition requirements remains uneven, particularly outside sectors directly targeted by mitigation priorities.

Finally, coordination across these initiatives remains incomplete. Although ODA plays a central role in implementing greening measures for enterprises, the responsible ministry (MEDD) is not formally represented within the National Commission on Climate Change (NCCC), limiting the institutional integration of enterprise-level support measures within the broader climate governance framework.

Policy documents associated with NDC 3.0 frame gender and social inclusion as functional components of an effective green transition, linking workforce participation, productivity and system resilience to the optimal use of available human capital. This orientation is reflected in formal commitments to equal access to VET, gender-responsive monitoring within climate reporting, and quantitative participation benchmarks. However, the interview evidence indicates that participation patterns in transition-relevant sectors remain uneven, with implications for workforce availability in key mitigation and adaptation activities.

Labour-market data point to persistent gender imbalances in sectors central to the green transition. For example, on average, women earn 16.6 % less than men and remain significantly underrepresented in construction, agriculture, forestry, transport and storage (National Bureau of Statistics of Moldova, 2024), sectors that together account for a substantial share of climate-relevant investment and employment potential. Such participation gaps reduce the effective skills pool available for transition-related activities and constrain the capacity of training systems to supply qualified labour at scale. As a result, workforce preparation challenges are shaped not only by training provision but also by structural participation patterns that limit labour-market entry into priority green sectors.

Beyond gender, policy frameworks identify several population groups facing structural barriers to employment, including persons with disabilities, youth and rural populations. In response, the Ministry of Education and Research has introduced targeted measures to support inclusive skills development, notably a 40 % increase in per-student public funding for learners with special educational needs (SEN). A system-wide mapping exercise, which covered approximately 800 VET learners with SEN and 200 learners with locomotor disabilities, identified institutional gaps relating to assistive technologies and physical accessibility that might limit their access to training pathways into emerging green occupations and their subsequent transition into employment.

Additional measures aimed at widening access to skills pathways include alternative entry routes into VET for learners who do not complete general secondary education, as well as entrepreneurship training modules incorporating green and circular economy concepts. In the case of small and medium-sized enterprises, access to selected public support schemes is conditional on completion of training modules relating to environmental sustainability, linking workforce skills development to enterprise-level transition support.

The interview evidence also highlights the importance of workforce transition for workers currently employed in carbon-intensive and fossil-fuel-related activities, which remain significant in Moldova's energy system and associated supply chains. While NDC 3.0 recognises skills shortages as a structural risk in sectors such as energy, agriculture and forestry, specific transition pathways for workers in fossil-fuel-dependent activities have not yet been systematically incorporated into educational, labour-market or social-protection instruments. As a result, reskilling and redeploying these workers will primarily be through general training provisions or project-based initiatives, rather than dedicated, sector-specific transition mechanisms.

Overall, while inclusion objectives are formally embedded in climate, education and employment policy frameworks, their contribution to workforce preparation for the green transition remains constrained by limited integration with skills anticipation systems and sector-specific transition planning. Participation gaps among women, vulnerable groups and workers in declining carbon-intensive activities reduce the effective labour supply available for climate-relevant investments and increase the risk of skills bottlenecks during implementation. This suggests that the current inclusion measures are only contributing to workforce readiness in a fragmented manner, with scope for stronger alignment between climate ambition, labour-market transition needs and skills delivery systems.

5. WHAT STAKEHOLDERS SAY: FINDINGS FROM THE INTERVIEWS

5.1 Perceptions of climate ambition and feasibility

Stakeholder interviews reveal broad recognition of the ambition embedded in Moldova's NDC 3.0, alongside differentiated assessments of its operational feasibility. Representatives from the Ministry of Environment emphasised the formal integration of education, labour and social protection authorities within the climate governance framework, referring to the Law on Climate Action as a mechanism for embedding social and workforce considerations into climate policy. From this perspective, the institutional architecture is seen as a significant step towards a whole-government approach to decarbonisation.

Interviews with line ministries and implementing bodies, however, point to variations in the depth and timing of this integration. Representatives from the Ministry of Education and Research, for example, reported limited access to forward-looking technical inputs from sectoral ministries, notably energy and agriculture. This constrains the anticipatory adjustment of education standards, curricula and training infrastructure to emerging green transition requirements and reinforces a reactive rather than proactive approach to workforce preparation.

At implementation level, coordination between policymaking bodies and delivery agencies was described as uneven. The National Agency for Employment (ANOFM), which plays a central role in labour-market analysis and workforce development, was frequently characterised as being more involved in the dissemination of climate-related decisions than in their formulation. Stakeholders noted that this sequencing limited the systematic integration of labour-market intelligence – such as evidence from employer surveys and forecasts – into the early stages of NDC development and sectoral policy design.

Across stakeholder groups, there was convergence on the view that references to skills development, education and training within climate policy documents remain largely high level. While human-capital considerations are clearly acknowledged in strategic frameworks, they are not consistently translated into operational instruments, such as sector-specific skills pathways, reskilling programmes or workforce transition mechanisms. In practice, initiatives explicitly targeting green skills and employability were most often associated with externally funded projects, while domestically anchored measures were perceived as limited in scale and continuity.

Governance arrangements were also discussed in relation to the functioning of the NCCC. While stakeholders recognised the NCCC as an important coordination platform at strategic level, interviews suggested that its role remains primarily consultative. The absence of permanent technical working arrangements (particularly on skills, labour-market and workforce transition issues) was seen as a constraint on translating high-level coordination into operational guidance, validation and follow-up across ministries.

Social dialogue on climate and workforce issues was similarly characterised as uneven. Employer organisations and social partners reported being consulted on selected policy initiatives but noted limited involvement in the co-design of sectoral transition pathways or skills responses to decarbonisation. This constrains the capacity of social dialogue mechanisms to function as channels for anticipatory intelligence, consensus-building and joint problem-solving in areas such as skills shortages, reskilling needs and labour reallocation.

Overall, stakeholder perceptions point to a governance landscape in which climate ambition is widely recognised but institutional coordination, operational sequencing and structured engagement with labour-market actors all remain underdeveloped. These dynamics shape the feasibility of NDC implementation by limiting the extent to which workforce considerations are embedded upstream in

climate policy design, with implications for delivery capacity under both NDC commitments and EU Chapter 27 requirements.

5.2 Skills, education and workforce readiness

One key constraint for effective policy alignment concerns the limited availability of specific and interoperable data for monitoring labour-market dynamics associated with the green transition. At present, the labour market statistics produced by the National Bureau of Statistics do not systematically capture employment shifts linked to decarbonisation, such as changes in employment levels across green and carbon-intensive sectors. As a result, evidence on workforce reallocation driven by climate policies remains fragmented and dispersed across multiple institutional sources.

Interviews with representatives of the Ministry of Labour and Social Protection and the National Agency for Employment point to gaps in administrative data required to assess the labour-market impacts of the green transition. In particular, no dedicated datasets are currently available to track green employment or green skills, nor is there a centralised registry of green competencies. While general labour-market indicators are monitored, existing systems do not allow for the systematic extraction of occupation- or sector-specific data relating to green activities using the national classification of occupations (CORM) or the classification of economic activities (CAEM).

Stakeholder perspectives further indicate that current data limitations affect both short-term anticipation and longer-term planning. Education authorities emphasised the need for anticipatory intelligence within the next one to two years to enable timely adjustments in teacher preparation and training infrastructure. At the same time, business representatives highlighted constraints in capturing evolving skills demand within the private sector. In this context, the National Confederation of Employers of Moldova (CNPM) reported that, in the absence of systematic sectoral data (particularly among SMEs that are not embedded in formal associations) assessments of emerging skills needs often rely on experiential judgement rather than structured evidence. This reliance on implicit knowledge underscores the gap between observed labour-market dynamics and formal planning instruments.

Without a consolidated sectoral information base or a centralised registry of green occupations and skills, as advocated by business stakeholders, the capacity of public authorities to undertake robust labour-market forecasting and to synchronise climate, skills and employment policies remains constrained.

Institutional capacity barriers

Stakeholder interviews indicate constraints in institutional capacity within central government that affect the coordination and implementation of climate policy. In particular, the Unit for Climate Change Policies within the Ministry of Environment, established only recently, operates with a limited number of specialised staff relative to the breadth and technical complexity of its mandate. This staffing profile poses challenges when it comes to managing the expanding portfolio of responsibilities associated with NDC implementation, including policy coordination, monitoring and reporting.

Interviews further suggest that high staff turnover across public institutions limits the accumulation of institutional knowledge over time. When experienced staff leave, capacity must be rebuilt through repeated onboarding and external support, which inevitably reduces continuity in policy design and implementation. Stakeholders associated these dynamics with structural constraints in public sector employment conditions, which affect the ability to attract and retain highly specialised expertise, particularly in areas requiring advanced analytical and econometric skills. As a result, technical functions relating to modelling, forecasting and detailed policy design are frequently supported by international partners, while permanent internal capacities remain comparatively limited.

Barriers and key challenges in skills development and technical training

Stakeholder interviews indicate that skills development for the green transition is constrained by conceptual ambiguity, institutional fragmentation and limited system responsiveness. A recurring issue is the absence of a shared national definition of 'green skills', which complicates competency mapping, programme design and workforce planning. This challenge is reinforced by institutional separation between entities responsible for technology deployment and those overseeing education and training, limiting coordinated approaches to greening the workforce.

At operational level, capacity constraints within the VET system remain significant. Interviewees reported a persistent 'technological gap' between training provision and industry practice, linked to outdated infrastructure and limited access to modern equipment and specialised laboratories. Teaching staff were described as lacking 'deep' technical exposure to emerging green technologies, particularly in fast-evolving fields such as renewable energy. While international partners have supported the development of micro-qualifications, the formal process for introducing new programmes remains sequential and time-intensive, thereby limiting responsiveness to any labour-market changes that might occur within three- to four-month cycles. In the absence of sufficiently agile formal provision, employers continue to rely on short-duration courses and company-based training to address immediate workforce needs.

Skills pressures identified by stakeholders correspond closely to the priority mitigation and adaptation sectors of the NDC 3.0, notably energy, agriculture, forestry, construction and manufacturing. In manufacturing, workforce constraints directly affect industrial processes and product use targets, where the transition to ecological raw materials and modern machinery requires specialised technical competencies. This alignment highlights the dependence of climate target delivery on sector-specific workforce readiness and effective skills anticipation.

Institutional responsibilities for skills anticipation are fragmented. While the Ministry of Education and Research leads curricula development and the Ministry of Labour and Social Protection oversees workforce policy, the National Agency for Employment (ANOFM) remains the primary body for labour-market analysis. ANOFM conducts annual forecasts and surveys of approximately 3 000 employers through its Labour Market Observatory, which is staffed by two specialists and does not include a dedicated green component. The ANOFM report Labour Force and Skills Forecast for 2025 from the Employers' Perspective analyses demand dynamics, investment plans, employment trends, qualification structures, labour shortages and skills needs; however, its sectoral coverage remains selective and does not explicitly address the green economy. For example, agriculture is discussed primarily in terms of declining demand (with 15.4 % of firms reporting reduced activity in 2024), while sanitation and waste-management activities are referenced mainly through aggregate growth trends (21.5 % of firms reporting increased demand) and the energy sector is not analysed separately.

These limitations are compounded by the absence of green employment or skills variables in national statistical data. As a result, social partners reported relying on 'intuition' rather than structured evidence to assess emerging skills needs, particularly among small and medium-sized enterprises that are not embedded in sectoral associations. In the absence of a centralised registry or sectoral skills database, labour-market analysis remains partial and dependent on ad-hoc assessments conducted by international organisations and development partners.

Although the national Classification of Occupations (CORM) was updated in 2025 in line with ISCO-08 and partially aligned with ESCO, interviewees reported that green terminology remains insufficiently integrated, constraining the tracking of transition-relevant occupations. To address these gaps, international partners have supported targeted pilots, including the introduction of three green specialisations for the 2025–2026 academic year; the inclusion of 'installers for shallow geothermal systems and heat pumps' in the CORM; and the identification of 18 core occupations in the water and waste sectors. Despite these initiatives, Moldova lacks a comprehensive, government-led system for anticipating green skills at scale. Stakeholders estimated that the availability of trained workers in the priority green sectors of energy efficiency, sustainable construction, waste management and green industrial production remains below 5 %, affecting implementation capacity.

In response, education authorities are increasingly emphasising agile, 'just-in-time' training modalities, including micro-qualifications and short-cycle courses, reflecting consensus that 'lifelong learning' is more relevant for the existing workforce than multi-year formal programmes. Curriculum reform has shifted from elective environmental topics towards mandatory technical requirements structured around three 'universal green competencies': efficient resource management, waste sorting and storage, and the safe handling of hazardous substances. However, the interview evidence suggests that implementation remains uneven and dependent on sustained teacher training and continued external support, while mechanisms for professional reconversion remain largely donor-funded, limiting scalability.

6. DISCUSSION: KEY GAPS IN ALIGNING CLIMATE AMBITION AND HUMAN CAPITAL DEVELOPMENT

The analysis confirms that Moldova has moved, relative to many comparable transition economies, from a set of isolated environmental commitments towards an economy-wide decarbonisation strategy anchored in the objectives of the Paris Agreement and aligned with the 1.5 °C temperature goal. NDC 3.0 consolidates this shift by combining quantified medium- and long-term mitigation targets with a stated commitment to climate neutrality by 2050, positioning climate policy as an integral component of national economic transformation rather than a standalone environmental agenda. Documentary evidence further indicates increasing alignment with European regulatory frameworks and sustainable finance instruments, suggesting that climate action is progressively becoming embedded within broader economic and investment planning. At the same time, the interviews indicate that while the ambition of the NDC is widely recognised, implementation is perceived as being contingent on the availability of adequate human capital and institutional capacity.

1. Skills intelligence and anticipation. The interview evidence indicates that labour-market information systems are only partially equipped to capture green skills and occupations. Existing classification systems and statistical instruments provide limited visibility on emerging competencies, constraining the ability of public authorities to track workforce-related progress alongside climate targets. ANOFM remains the central body for labour-market analysis, conducting annual forecasts and employer surveys covering approximately 3 000 firms, and its *Labour Force and Skills Forecast for 2025 from the Employers' Perspective* provides useful insights into demand dynamics, investment plans, labour shortages and qualification structures. However, its sectoral coverage remains selective and does not explicitly address the green economy, while the Labour Market Observatory operates with limited staff and without a dedicated green analytical component; social partners therefore reported relying on experiential judgement to assess skills needs, particularly among SMEs outside formal sectoral associations.

2. Education and training system responsiveness. Policy frameworks place strong emphasis on modernising vocational and higher education systems and integrating climate-relevant competencies. In vocational provision, this includes mandatory technical requirements and the introduction of 'universal green competencies' across occupational profiles, alongside targeted pilots such as micro-qualifications and new green specialisations. In parallel, higher education institutions are expected to contribute to implementation capacity by supplying specialised profiles relevant for the transposition, monitoring and enforcement functions associated with EU Chapter 27, including technical expertise for environmental assessment, auditing, inspection and project delivery. The interview findings, however, point to persistent delivery-side constraints across the system: outdated training infrastructure, limited teaching expertise in renewable and low-carbon technologies, and accreditation cycles that are poorly aligned with the pace of technological change in green industries. While NDC 3.0 recognises skills shortages as a structural risk and clearly articulates sectoral targets, the availability of trained staff in priority sectors remains limited, with stakeholders estimating workforce readiness in some green sectors at below 5 %. Overall, training provision has been partially supported through externally funded pilots, but investment in reskilling remains marginal relative to capital expenditure, and systematic evaluation of learning outcomes is limited.

3. Public administration capacity. From a governance perspective, Moldova has established a centralised institutional architecture through the NCCC, which operates under the authority of the Prime Minister and distributes climate mandates across key ministries. Documentary analysis shows that this structure is intended to ensure horizontal policy integration, explicitly linking climate objectives with education, labour-market and social policies. The interview evidence, however, points to a divergence between formal institutional arrangements and operational practice: line ministries responsible for education and labour reported limited involvement in technical drafting and early policy

design, and the NCCC was described as lacking permanent technical working arrangements capable of translating strategic oversight into operational guidance and follow-up. Capacity constraints further compound these challenges. Severe understaffing and high staff turnover in central administrations limit institutional memory and reduce continuity, meaning that core technical functions such as modelling, forecasting and specialised policy design remain heavily reliant on international partners. Financing patterns reinforce this risk: while the Ministry of Finance leads climate budget tagging and expenditure tracking, international sources account for roughly three quarters or more of climate-related financing, with domestic resources playing a complementary role (IMF, 2024; UNDP, 2023), which interviews suggest can weaken long-term investments in skills and institutional strengthening.

4. Inclusion and participation gaps. Although gender-responsive principles and inclusion targets are embedded in policy documents, the interview evidence suggests that structural barriers persist. Technical fields remain male-dominated and vulnerable groups (including Roma communities and persons with special educational needs) continue to face obstacles in accessing education, training and employment pathways linked to the green transition. These participation gaps reduce the effective labour supply available for transition-relevant sectors and can amplify skills bottlenecks during implementation, indicating that inclusion objectives (while formally recognised) are not yet consistently operationalised through workforce and training measures.

7. POLICY POINTERS

Translating climate commitments into durable national action remains a persistent challenge across transition economies, where high-level ambition often encounters policy volatility, constrained administrative capacity, fragmented regulatory responsibilities, financing gaps and unresolved distributional concerns (Vernygora *et al.*, 2016; Dąbrowski, 2022). In Moldova, these structural implementation barriers intersect directly with EU accession requirements under Chapter 27, where effective transposition and enforcement of the environmental *acquis* depend not only on legal alignment but also on sustained institutional capacity, interministerial coordination and workforce readiness. Frequent government changes weaken long-term investment signals, while limited administrative resources, procedural bottlenecks and reliance on external financing constrain the scaling of climate programmes, monitoring systems and associated skills reforms (Simmonds & Louime, 2023; Davies & Vági, 2023). At the same time, distributional pressures (linked to energy poverty, regional disparities and labour-market adjustment) underscore the importance of inclusive governance arrangements to secure political legitimacy for climate action (Lightfoot *et al.*, 2016; Pál *et al.*, 2021). The policy pointers that follow therefore target those binding constraints where strengthened skills intelligence, institutional coordination and workforce transition mechanisms can most directly enhance implementation capacity and support a credible, socially sustainable green transition.

The analysis shows that Moldova's NDC 3.0 provides a strong strategic framework for climate action, but that its effectiveness will depend on the country's ability to address a limited number of binding constraints relating to skills intelligence, institutional coordination and delivery capacity. The policy pointers below focus on these constraints. They are not intended as an exhaustive reform agenda, but rather as a set of priority directions to support the translation of climate ambition into credible, implementable, inclusive outcomes in the context of Moldova's green transition and EU accession process.

7.1. Embed skills governance within climate and energy decision-making

Education and labour institutions should be systematically involved in technical climate policy design, not only formal coordination. This requires establishing permanent technical working arrangements under the NCCC to address workforce and skills implications of sectoral decarbonisation pathways. As a minimum priority, the creation of a Sector Skills Council for energy would translate climate and energy targets into occupational profiles, qualifications, training standards and reskilling pathways, while structuring dialogue between ministries, social partners and employers. This also directly addresses Chapter 27 capacity requirements linked to implementation, monitoring and enforcement of the environmental *acquis*.

7.2. Align skills anticipation and labour-market intelligence with climate priorities

Skills anticipation systems, employer surveys and forecasting exercises should be explicitly linked to climate mitigation and adaptation objectives. Labour-market, education and PES data systems should be upgraded to generate timely, internationally comparable indicators on skills supply, skills utilisation and sectoral demand relevant to the green transition.

The progressive adoption of ESCO as a reference framework (alongside national classifications) would strengthen occupational mapping, support sector-level analysis and improve EU-aligned reporting, including under Chapter 27 accession processes.

7.3. Strengthen VET and work-based learning for priority green sectors

VET and tertiary education programmes should continue to be updated so that they reflect the concrete skills profiles needed for decarbonisation and adaptation in priority sectors. Centres of Excellence can be used as practical hubs to pilot updated qualifications and learning materials and to support wider roll-out across the system.

To address equipment gaps and limited exposure to modern technologies, Moldova should scale up dual education, apprenticeships and other forms of work-based learning. Expansion should focus on sectors central to the NDC (notably energy, construction, manufacturing and agri-food), in which employer participation can accelerate skills acquisition and improve job placement.

Curriculum updates should be matched with investment in teaching capacity. Initial teacher education and continuous professional development for VET and technical teachers should prioritise applied training in green technologies, resource efficiency and relevant industry standards, so that reforms can be delivered consistently at scale.

Clearer sector prioritisation, incentives for employers and structured coordination between training providers, enterprises and public authorities would all help to ensure that work-based learning delivers transition-relevant skills and supports smoother school-to-work pathways.

7.4. Integrate workforce considerations across government

The workforce and skills implications of climate action remain unevenly understood outside education and labour institutions, yet many transition decisions (e.g. infrastructure investment, industrial policy, permissions and enforcement) create immediate demands for specialised skills. To mainstream the workforce dimension, line ministries and implementing agencies should systematically include a short 'skills and workforce' assessment in climate-related policy proposals and investment appraisals, covering (i) expected occupational impacts, (ii) training/reskilling needs and (iii) delivery constraints (e.g. inspectors, technicians, installers, auditors).

Targeted capacity-building should therefore be organised across administrations involved in Chapter 27 transposition and enforcement, focusing on the practical competencies needed to implement the *acquis* (monitoring, permitting, inspection, data reporting and project management). In parallel, the NCCC (or its technical working arrangements) should provide a standing coordination channel whereby workforce requirements can be translated into action, linking sector ministries with education and labour institutions, public employment services and social partners. This would support more realistic sequencing of reforms and help ensure that staffing plans and training provision keep pace with regulatory and investment obligations.

Where possible, responsibilities should be assigned to named institutions and tracked through simple indicators (e.g. number of trained staff, time-to-fill critical technical roles, coverage of priority occupations, etc.), so that workforce readiness becomes a measurable part of implementation reporting.

7.5. Embed inclusion and just transition considerations in workforce planning for the green transition

Workforce planning for the green transition should explicitly address distributional and inclusion risks, ensuring that the employment benefits associated with renewable energy expansion and climate-related investment are accessible to a broad segment of the population, while workers in carbon-intensive and fossil-fuel-related activities are supported through the transition into new, sustainable employment.

Targeted reskilling, redeployment and career-transition pathways should be developed for workers in declining or hard-to-transform activities, particularly in energy-related supply chains and associated industries. These pathways should be linked to labour-market demand in emerging green sectors and complemented by appropriate income support, guidance and activation measures, so that skills development translates into viable employment outcomes rather than short-term training provision.

At the same time, inclusion objectives should move beyond formal commitments to address structural participation gaps that constrain workforce availability in transition-relevant sectors. This includes strengthening access to green skills pathways for women, rural populations, Roma communities and persons with disabilities or special educational needs, through targeted outreach, flexible learning formats and supportive measures that reduce barriers to entry and completion.

Integrating inclusion and just transition considerations into climate, skills and employment policies should be treated as a practical implementation priority. Aligning climate ambition with equitable workforce outcomes can help expand the available skills base, reduce bottlenecks during delivery, and mitigate social risks liable to undermine the pace and credibility of reform. To this end, public authorities should ensure that decarbonisation measures are accompanied by targeted inclusion actions and transition support (including accessible training pathways, guidance and activation measures, and appropriate income support where needed), so that climate action contributes to inclusive growth and decent work in line with the principles embedded in NDC 3.0.

7.6. Embed skills and workforce planning within NDC implementation and financing

Climate strategies should explicitly cost and finance human-capital measures, including education, training and reskilling, and reflect these in dedicated financing plans. Clear costing would also facilitate engagement with development finance institutions where domestic resources are insufficient to support workforce transitions.

Education, labour and social affairs authorities should be formally integrated into NDC design, implementation and monitoring and supported by strengthened coordination mechanisms across the areas of climate change and human-capital.

ANNEX

Interview guide

Topic	Question
Policy and planning	Are ministries responsible for education, vocational training, skills development and employment actively involved in NDC development (not referring to capacity-building for assessing and formulating CC strategy, but regarding employment needs and skills in new and existing jobs)? If yes, which ones and how? How do the NDC commitments align with national employment and social protection strategies (including informal workers) and education/VET policies (including non-formal types)? Do mitigation/adaptation strategies come with a skills development component?
Coordination and social dialogue	Which coordination mechanisms are in place (to link CC with economic, employment, and education policies)? And in NDC in particular? How does the government engage with other stakeholders? Who are the key government entities in the development of the NDC? Are social partners involved and how (major industrial/private sector players, employer/business/sectoral organisations, representatives of SMEs, trade unions, NGOs, representatives of informal workers)?
Data and info	What are the data gaps and requirements for evaluating and monitoring progress relating to jobs and skills for transition? Which institutions/systems are in charge of employment development and skill needs identification? Have assessments been conducted or are they planned to anticipate the skills needed for green jobs, including upskilling and re-skilling requirements? If so, do these use quantitative and/or qualitative approaches? What mechanisms or instruments exist to track the impact of decarbonisation policies on employment and skills development?
Jobs and skill needs	What is the current situation in terms of the availability of a trained workforce (in priority sectors)? What policies, programmes or strategic frameworks exist (or are planned) to support workers and small businesses in the green transition? What groups/jobs/occupations need reskilling/upskilling? Which employment shifts will occur, which jobs/skills will become obsolete and which new ones will emerge? What are the skill needs and skills shortages that act as barriers to implementing climate targets (priority sectors)? What are the retraining and upskilling needs? Are there (criteria) for 'green' competence standards in new/existing jobs?
Education and VET	What approaches are currently being used (nationally, regionally and/or locally) to develop skills and competencies? What is the impact of education and VET on employment (adequacy)? Has an evaluation been conducted of the capacity of the existing education and training system to support a just transition? If so, what are the key challenges and barriers that it faces in providing skill development for new and existing jobs? What levels are considered critical (secondary, TVET, higher) and types (general/formal; apprenticeships and practical work; short-flexible courses; lifelong learning)? What are the considerations and criteria for curricula in education/VET for transition-relevant training and skills?

Finance and investment	Are there any social programmes/funding in place to cushion the negative employment effect and support reskilling/upgrading? If so, how are these delivered and funded? If so, has an evaluation been done on their results (how many shifted jobs, found a new job, stayed in their old job, etc.)? Are there strategies in place to secure international and/or domestic funding for education and skills development relating to climate action?
Inclusivity	To what extent are gender aspects and social inclusion aspects (disadvantaged groups, minorities, youth, rural) taken into account in formulating (mitigation/adaptation) measures and related skills development?
NDC 3.0	What elements of the employment and skills transition should be in the NDC, in your opinion? One, more or all of the following? ■ references to reskilling or upskilling programmes for workers in sectors negatively affected by climate policies (yes/no), ■ strategies/system for identifying and anticipating evolving green job requirements skills needs (yes/no), ■ integration of the human capital and skills component as a separate component in NDC or as entries in sections describing (each of) the mitigation and adaptation measures? (yes/no), ■ coordination among line ministries – such as education, employment, environment (CC) and economy (and sectors) – along with involvement of and consultation with social partners (yes/no), ■ job development and skills training of specific groups (women, youth, disadvantaged, etc.) (yes/no), ■ investment and financing needs for transition-relevant education and training (yes/no).

ABBREVIATIONS

ANOFM	National Agency for Employment (Moldova)
CADS	Corpus-assisted discourse studies
CAEM	Classification of economic activities
CC	Climate change
CCI	Chamber of Commerce and Industry of the Republic of Moldova
Cedefop	European Centre for the Development of Vocational Training
CNPM	National Confederation of Employers of Moldova
CORM	Classification of Occupations of the Republic of Moldova
ESCO	European Skills, Competences, Qualifications and Occupations classification
EU	European Union
ETF	European Training Foundation
GHG	Greenhouse gas
GoM	Government of the Republic of Moldova
ILO	International Labour Organization
IMF	International Monetary Fund
INDC	Intended Nationally Determined Contribution
IPPU	Industrial processes and product use
ISCO-08	International Standard Classification of Occupations (2008)
LULUCF	Land use, land use change and forestry
MDL	Moldovan leu
MEDD	Ministry of Economic Development and Digitalisation (Moldova)

MER	Ministry of Education and Research (Moldova)
MLSP	Ministry of Labour and Social Protection (Moldova)
MoE	Ministry of Environment (Moldova)
MRV/MRVA	Monitoring, reporting and verification/Monitoring, reporting, verification and Assessment
NCCC	National Commission on Climate Change (Moldova)
NBS	National Bureau of Statistics of the Republic of Moldova
NDC	Nationally Determined Contribution
NGO	Non-governmental organisation
ODA	Organisation for Entrepreneurship Development (Moldova)
OECD	Organisation for Economic Co-operation and Development
PPMI	Public Policy and Management Institute
PES	Public Employment Services
SEN	Special educational needs
SME	Small and medium-sized enterprise
TVET	Technical and vocational education and training
UNDP	United Nations Development Programme
UNFCCC	United Nations Framework Convention on Climate Change
VET	Vocational education and training

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