

Building an Albanian Qualification Framework: Demand-Side Analysis and List of Occupations

Working paper

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February 2015

This study was funded by the European Training Foundation.





ACKNOWLEDGEMENT

The authors would like to express their appreciation and special gratitude to Ms Silvana Radovani from the Ministry of Social Welfare and Youth (MoSWY), who has been of great support and, indeed, the main driver behind this initiative.

We are very grateful to all the people from businesses, business associations and Chambers of Commerce and Industry who offered their valuable advice and contributions during our consultation process.

Furthermore, this study would not have been possible without the kind assistance and help of many individuals in all the regions of Albania. Thus, sincere thanks and appreciation go to the authorities of all the 12 Prefectures, as well as the Regional Employment Offices for organizing and hosting the regional consultations workshops.

Our thanks go to all people who dedicated their time and energy to us and shared their concerns, ideas and visions for a better human resource development in Albania.

The results of this study are going to be used to update the national list of vocational qualifications linked with the Albanian Qualifications Framework (AQF). In addition, they will serve to review the offers of the public VET providers. The ultimate aim is to improve the quality of young people's qualifications and Albania's labour force.



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ACRONYMS

AQF	Albanian Qualifications Framework
CoM	Council of Ministers
EBRD	European Bank for Reconstruction and Development
ETF	European Training Foundation (EU agency based in Turin)
EU	European Union
GDP	Gross Domestic Production
GIZ	Gesellschaft für Internationale Zusammenarbeit
GVA	Gross Value Added
HRD	Human resource development
INSTAT	Institute of Statistics
LFS	Labour Force Survey
LM	Labour market
LSMS	Living Standards Measurement Survey
MARDWR	Ministry of Agriculture, Rural Development and Water Resources
MoES	Ministry of Education and Sports
MoSWY	Ministry of Social Welfare and Youth
NAVETQ	National Agency of VET and Qualifications
NES	National Employment Service
PPP	Public Private Partnership
RDE	Regional Department of Education
RED	Regional Employment Department
SBR	Statistical Business Register
SES	Strategy for Employment and Skills
SNA	Skill Needs Analyses
VET	Vocational Education and Training
VS	Vocational School
VTC	Vocational Training Centre
TA	Technical Assistance
TAP	Trans Adriatic Pipeline Project
UNDP	United Nations Development Programme

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EXECUTIVE SUMMARY

Skills are a critical asset for individuals, businesses and societies. The importance of skills is even more pronounced in a dynamic, globalized world. It is crucial to ensure that the skills developed are relevant for the working world; that they are maintained and further improved during working life; and that they are recognized and used by employers once people are in the labour market. Matching skills and jobs has become a high-priority concern for the Albanian government. Many employers report difficulties in finding suitably skilled workers. Although part of these difficulties are explained by factors other than skills, such as uncompetitive wages, unattractive working conditions, poor recruitment policies and/or mismatch between the location of skills and jobs, they are mostly related to skill gaps and deficits in specific sectors, occupations and regions. Part of the observed skills mismatch is the consequence of individuals' initial educational and occupational choices, of education and training not providing the skills required, and of typically imperfect information about labour market opportunities.

Both the Albanian economy, the labour market and individuals' aspirations have undergone fundamental changes in the past years. The VET system has generally not been in a position to keep pace with these developments. Good practice examples exist only in certain institutions and programmes that have enjoyed sustained national, donor and/or private sector support. Numerous analytical and strategic papers have concluded that more systemic efforts are needed at this point to bring VET provision better in line with identified labour market demands. There is no point of offering education and training for young people or adults, which is of little value for them in terms of becoming skilled workers or progressing on in education to develop higher levels of skills. The ultimate aim of a reformed VET system is to bring up skilled people who are sought after by employers or able to set up their own businesses.

By now various skills needs analyses have been undertaken in Albania at national, sectoral and regional levels. Drawing on these analyses and on additional consultations with sector and regional representatives, the most important outcomes of the present report are:

1. A **draft national list of most demanded occupations** (see Chapter VI) and
2. An **overview over occupations/ qualifications needed in each Albanian region** (see Chapter V).

We have used mainly qualitative methodologies to compile these two major outcomes. They have been adopted according to the time and resources available. The draft list of most demanded occupations introduced can be used for further discussions and with a view to build an Albanian Qualifications Framework. The latter is essential to organize the whole system of qualifications and link them to identified skill needs, to ensure that qualification standards and certificates are uniformly used across the country, that they are transparent and credible for both learners and employers, and that they encourage learners to acquire higher levels of qualifications within a lifelong learning perspective.

In addition, the overview over occupations/ qualifications needed in each Albanian region, alongside the Final report of the GIZ-ETF 2014 Baseline Survey of Public VET Providers and other research, will be useful for further discussions to inform the required optimization of the network and VET offers of (public) VET providers in each Albanian region. A next step in this process would be to compile a **National VET Provider Development Plan**, which in turn would serve as a basis for Strategic Investment Plans, a National VET Staff Development Plan etc.

I. INTRODUCTION

In 2010 the EU countries agreed to new policies and strategies up to 2020 in order to take account of “modern living” and the extension of “decent work” for all in accordance with international conventions and declarations. Albania cannot stand apart from such developments. Weaknesses in the Albanian education and training system and the labour market hinder the full development and use of the country’s human capital. The result is that firms face a dearth of skills that limits their competitiveness and growth.

The changing structure of the Albanian economy, characterized in particular by the growing importance of commercial services, such as business services and retail, and the decline of employment in manufacturing and primary industries, has affected labour demand. At the same time required skill levels have increased within most of the industries, which is among others due to changed production cycles and the introduction of new technologies.

The recent economic crisis and consequent budget constraints strengthened the awareness that people need to be equipped with the right skills and competences to fulfil the demands of a modern labour market. To guarantee the success of the National Employment and Skills Strategy 2014-2020 (NESS 2020), making economies of scale and orientating VET provision better towards identified labour market needs is a precondition.

Furthermore, not only the employers, but everybody wants to know the value of awarded certificates, and the knowledge and competences that people can offer or expect. Everyone wants to make sure that, for instance, the plumber who repairs pipes in their homes is truly qualified and competent for the job. The companies need skilled employees to increase productivity in the workplace. Certificates currently awarded by different education institutions certify attendance, rather than the competences and skills acquired. Some certificates may not be officially recognized by the state or employers. The existence of a national qualifications framework is essential to organize the whole system of qualifications and link them to identified skill needs, to ensure that qualification standards and certificates are uniformly used across the country, that they are transparent and credible for both learners and employers and that they encourage learners to acquire higher levels of qualifications within a lifelong learning perspective. Also, Albanian businesses are increasingly operating on international markets, and Albanian citizens may wish to migrate and work abroad. This suggests that Albanian qualifications (a) take account of international standards, where necessary and (b) are referenced against the competence levels of the European Qualifications Framework.

The present report was written with the following purposes in mind:

- (i) identifying the sectors of strategic importance to Albania and the occupations required within these sectors;
- (ii) consulting key stakeholders in all 12 Albanian regions about the perceived needs for certain occupations;
- (iii) compiling an initial national list of most demanded occupations; and
- (iv) providing further analysis to inform the required optimization of the network and VET offers of public VET providers in each Albanian region.

Following the Introduction in Chapter I, Chapter II describes the Methodology used for this research, which includes some of the main publications consulted to compile this report. Chapter III provides a brief overview over the Albanian economy and labour market and over the main findings from national skill needs analyses. Chapter IV analyses each of the key economic sectors and the skills or occupations required within these sectors. Chapter V briefly describes the context and the outcomes of our consultations in each of the 12 Albanian regions. Based on the national, sectoral and regional analyses undertaken, Chapter VI includes the suggested draft list of most demanded occupations. Finally, Chapter VII concludes with an outlook for further action.

II. METHODOLOGY

2.1 Research questions

This research analyses the demand for skills, occupations, as well as qualifications at national and regional levels with a view to inform a draft national list of most demanded occupations. Key research questions included:

- What are the key economic sectors in Albania, including new or emerging ones, and which skills or occupations are required within these sectors?
- What are the priority sectors within each of the 12 Albanian regions, identifying in particular those that have a certain employment potential?
- Which skills or occupations, at different levels of competence, are required by these sectors? And which jobs related to certain skills or occupations are currently difficult to fill?
- In the occupations, which competences are essential to be acquired and certified before people take up employment or open their own business?

2.2 Research strategy

In the initial phase of our research we analysed a large number of relevant strategies and analyses and collected a number of data. In Albania there is a wealth of such analyses by now – mostly funded with the support of different donors and written with different purposes in mind, but they were nevertheless found useful for this study. The most important ones are listed in the section on the desk research stage below. In the course of this research, in particular when we tried to interpret the results from our qualitative research, we continued to refer back to our initial research, which helped us gain an understanding of the situation and put it in context.

In the later stages of this research we applied a predominantly qualitative research strategy, not only because robust data to identify and forecast economic and labour market developments and respective skill needs in Albania are largely lacking. The semi-structured consultations add value to the process in that they allow also for the anticipation of new developments or issues arising and for diversity in responses. The number of stakeholders consulted, including authorities, businesses and institutions, has been quite big for the purposes of this study so that the results from the in-depth analyses of participants' responses can be considered to be of some representative value.

2.3 Desk research stage

Desk research was carried out to investigate economic and labour market trends, as well as trends and issues as regards skills and training needs. In this context, all available national, sectoral and regional strategies or skills or training needs analyses were analyzed. The most recent ones include:

- three Skills Needs Analysis (SNA) carried out by the National Employment Service (NES) in 2008, 2010 and 2012, respectively;
- Rama, L. and Matja, L., *Sector skill needs analysis in Albania*, ETF working paper, 2012, which provides an initial account of most of the priority economy sectors in Albania and suggests a list of occupations for initial and continuing VET;
- GIZ and ETF, *Final report: Baseline survey of public VET providers in Albania*, 2014, that has collected and analysed a wealth of data on all 42 vocational schools and 10 vocational training centres (VTCs) and which states that, according to an estimate of school directors, on average only 30% of students get a job after graduation (page 52);

- Gjini Consulting who have conducted a pre-feasibility study to set up two maritime VET centres in Durres and Vlora, using a public-private partnership (PPP) model (the study was financed by the World Bank and finalized in 2015)¹;
- Institute for the Promotion of Social & Economic Development, *Report on skills gap in the agro-processing, ICT and tourism sectors in Albania*, RISI Albania publication, 2014;
- ILO/ Rama, L., *Skill needs analysis 2014*, publication by the ILO-IPA 2010 HRD project and RISI Albania, 2014.

Other pieces of information used in this research comprise:

- macro and microeconomic data published by INSTAT, EBRD, IMF, WB, ILO, AIDA, academic literature and other Albanian institutions such as the MoES, MoSWY, NES etc.;
- information provided by line ministries and other public institutions with regard to the different economic sectors in Albania;
- information on regional trends published by prefectures, Regional County Councils, regional development agencies etc;
- information from national and regional strategies and on the reforms undertaken in Albania;
- information on the supply side, including VET and higher education provision;
- information from other sources.

Existing skills or training needs analyses primarily have a domestic focus. We realized that it might be important to add, at some point, an international dimension to such analyses. This is due to the fact that businesses become more internationally oriented and the labour force increasingly mobile, as it was argued in the Introduction.

2.4 Field research stage

2.4.1 First phase

The desk research provided essential input for the qualitative part of this research. The authors conducted semi-structured interviews with different stakeholders in Albania on pre-defined economic sectors and on regions with a view to establish the most needed skills or occupations.

An important factor for the success of the interviews was the identification of 'key persons' inside enterprises who play a crucial role in hiring and managing the daily work of employees. In this context, the authors were able to draw on pool of experts who form part of the NAVETQ working groups. They are already familiar with the process of articulating needs for the purposes of developing the national list of vocational occupations/ qualifications.

Interviews were conducted with stakeholders such as: Ministries, business organizations, development agencies, sectorial business organizations, relevant individual businesses and employees etc. In total more than 90 representatives of employers' organizations or professional associations at national and sector levels, of companies, line ministries, consulting companies, universities, etc. were consulted in the first phase.

The semi-structured interviews offered good qualitative insights into the hard data provided by the desk research. Some focus groups were organized for predefined sectors such as the maritime sector,

¹ The Maritime VET PPP in Durres would focus on fishery and vessel maintenance and repair, as well as skills upgrading for sea fishers for up to 4 weeks and lake fishers for up to 2 weeks per year. The PPP Maritime VET centre in Vlora would offer hospitality and navigation courses as part of secondary level education, as well as compulsory training for seafarers in line with the International Convention on Standards of Training, Certification and Watchkeeping for Seafarers (or STCW).

manufacturing/ processing industry, agriculture, forestry and fishing, extracting industry, construction, ICT etc. They addressed the following three main questions:

- What are those positions, functions, tasks for which you need qualified people?
- What are those positions, functions, tasks which you have more difficulties in finding qualified people?
- What are those positions, functions, tasks in which you need additional staff qualifications?

At the first National VET Conference in Albania on 4th November 2014 a preliminary *List of Occupations/Skills/Tasks and Qualifications* identified from the literature review and first phase of consultations was presented.

2.4.2 Second Phase

During the second phase, covering the period November 2014 – February 2015, 12 consultation workshops with key stakeholders were organized in all 12 Albanian regions plus an additional one in Kamza.

Table 1: Calendar of Regional Consultations

Region	Date of the regional consultation	Meeting place
Korce	26 November 2014	Prefecture, Korce
Gjirokaster	02 December 2014	Prefecture, Gjirokaster
Vlore	10 December 2014	Prefecture, Vlore
Fier	11 December 2014	Prefecture, Fier
Kamza	12 December 2014	VE School/MFC Kamez
Durres	15 December 2014	Prefecture, Durres
Shkodra	18 December 2014	Prefecture, Shkoder
Lezha	19 December 2014	Prefecture, Lezhe
Berat	13 January 2015	Municipality, Berat
Elbasan	30 January 2015	Prefecture, Elbasan
Kukes	03 February 2015	Culture Centre, Kukes
Dibra	10 February 2015	Hotel Veri, Peshkopi
Tirana	12 February 2015	Ministry of Social Welfare and Youth

The aim of these meetings was to identify the needs for qualifications in each region, consistent with regional economic development priorities and trends in employment. Initially, participants were briefly introduced to the objectives of the NESS 2020, the results of the GIZ/ ETF Baseline Study on the 52 Public VET Providers, and the AQF and its role. An overview was given over the regional economic structure and priorities. Finally, four main questions were put forward for discussion:

- What are priority sectors in your region?
- Which occupations are required within each sector and how do you assess the potential for future employment in these occupations?
- Which job positions are difficult to be filled in your sector (due to the lack of skills at various levels of competence)?

- In the occupations, which competences are essential to be acquired and certified before people take up employment or open their own business?

The 13 workshops brought together approximately 350 participants from private enterprises, business organizations, central and local authorities, NGOs, experts and consultants, labour offices, private and public VET providers, universities, trade unions, etc. The inclusion of a big number of stakeholders in this process was important to achieve the aforementioned objectives.

DRAFT

III. ALBANIAN LABOUR MARKET AND MAIN FINDINGS FROM SKILL NEEDS ANALYSES

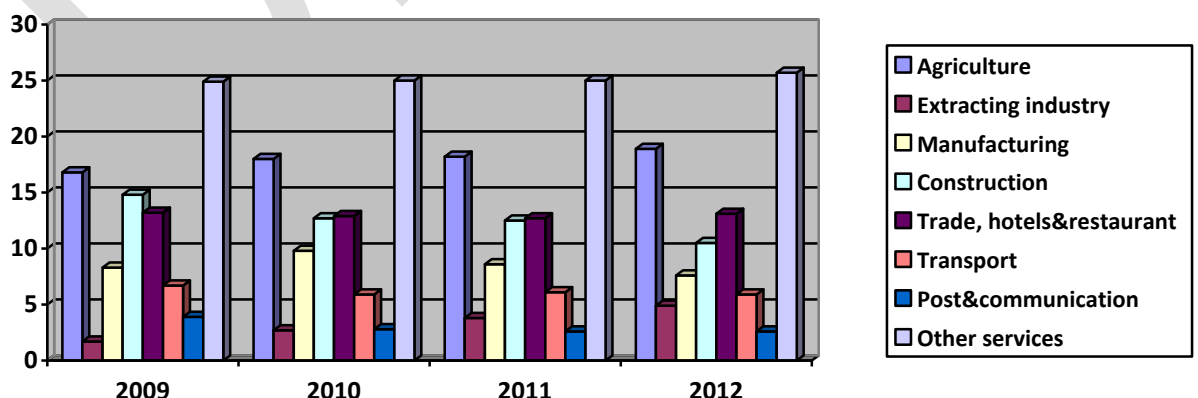
3.1 Brief overview over the Albanian economy, demography and labour market

The Albanian economy has shown tentative signs of improvement during the first nine months of 2014. Value added in the economy recorded an annual increase by 1.3% during first the nine months of 2014. The Albanian economy continues to operate below potential, which in turn is reflected in inflation, which is below the target of the Bank of Albania. Economic growth is expected to steadily accelerate, from the 1.4% recorded in 2013 to reach 4.5% in 2017. However, the economy is expected to continue operating slightly below its potential growth for 2015, and the gap is expected to close in the first half of 2016. Economic growth is forecasted for 3% in 2015 and 4% in 2016. Exports of goods and services, particularly touristic services, are expected to perform well in the medium term, increasing by an annual average of 6%. According to the Global Competitiveness Report of the World Economic Forum 2012-2013, Albania is ranked 89th out of 144 countries/economies.

The SME sector has a substantial contribution to economic growth and employment. Based on INSTAT data from 2011, the contribution of SMEs to GDP is more than 73% and to employment more than 71%. Over 50% of SMEs are operating in Tirana and Durres. Prevailing in number are activities in the fields of trade and catering-restaurants sector. The creative economy is considered as a promising economic sector with the potential to contribute to the regional and national economy, and to job creation as well.

Macroeconomic growth averaged around 6% between 2004-2008, but declined to about 3% in 2009-2011 and 1.5% in 2012 (INSTAT 2012), highlighting the relative stability of the economy despite the global economic and financial crises. This was partly due to the inflow of remittances and relatively stable domestic demand. Inflation is low and stable. In 2012 GDP growth was led mainly by the dynamics of the service sector, while in the first half of 2013 the manufacturing, agriculture and construction) had the leading role in the economic growth. This development largely reflected the revival of construction activity, which was fuelled mainly by fiscal stimuli injected during that year.

Figure 1: The contribution of economic sectors in GDP in Albania, 2009-2012



Source: INSTAT 2013

In 2005 Albanian exports were dominated by Italy, Greece and Kosovo, which occupied the first three places. However, in 2013 this proportion had changed. Italy remains the first, albeit with less weight than eight years before. Greece and Kosovo have been replaced by other countries, such as Spain

and Malta. Problems, such as the high public debt and a high current account deficit, when combined with ambitious spending plans, lower levels of investment and remittances, pose serious challenges in the near future. Still, potential sectors for export products remain largely the same so-called traditional sectors, including: (i) textiles, clothing and leather (the sector comprised around 28.2% of total exports in 2013), (ii) minerals and hydrocarbons (oils) that together with the fuel and energy sector constituted 40.4%, and (iii) building materials that made up about 14.7% of total exports in 2013.

Based on the preliminary results of the 2011 Population and Housing Census (INSTAT), the total population of Albania was 2,831,741, among them 1,421,810 males (50.2%) and 1,409,931 females (49.8%). Compared to the Census ten years earlier, the population of Albania was 3,069,275, which means that the population has decreased by 7.7%. Large scale emigration and a fertility decline are the main causes of this population decrease. For the first time in the history of population censuses in Albania, the population in urban areas is larger than the population of rural areas. According to the 2011 preliminary census results, 53.7% of the population lives in urban areas and 46.3% in rural areas. 64% of urban population (34% of the total population) is currently living in the 8 largest cities - Tirana, Durres, Vlora, Elbasan, Shkodra, Kamza, Fier and Korça. Albania still has a considerable young population, which actually requires that many new jobs are created.

Albania's labour market has undergone some shifts over the last decade. Between 1999 and 2013 formal non-agricultural employment in the private sector more than doubled, fuelled largely by foreign investment. Emigration and urbanization brought a structural shift away from agriculture and toward industry and a variety of services, including banking, telecommunications and tourism. Nevertheless, agriculture remains one of the largest sectors in Albania. Agriculture represents around 20% of GDP and accounts for about half of total employment. It is the main source of employment and income in rural areas despite the fact that it faces a number of challenges, such as land property issues, small farm sizes, poor infrastructure and institutions, market limitations, limited access to loans and grants.

Due to the crisis labour market indicators for 2013 generally worsened compared to 2012.

Table 2: Main Labour Market Indicators

Përshkrimi	2012	2013	Description
Popullsia e moshës 15 vjeç e lart (I + II)	2.229.652	2.231.065	Population aged 15 years and above (I + II)
I. Forca e punës	1.290.559	1.175.919	Labour force
Të punësuar	1.117.139	992.029	Employed
Të papunë	173.420	183.890	Unemployed
II. Ekonomikisht jo aktivë	939.094	1.055.146	Inactive
Shkalla e papunësisë	13,4%	15,6%	Unemployment rate
Shkalla e Punësimit	50,1%	44,5%	Employment rate
Shkalla e pjesëmarrjes në forcat e punës	57,9%	52,7%	Labour force participation rate
Popullsia e moshës 15-64 vjeç (I + II)	1.898.793	1.902.988	Population aged 15-64 years (I + II)
I. Forca e punës	1.243.007	1.139.162	Labour force
Të punësuar	1.069.798	955.787	Employed
Të papunë	173.209	183.376	Unemployed
II. Ekonomikisht jo aktivë	655.786	763.825	Inactive
Shkalla e papunësisë	13,9%	16,1%	Unemployment rate
Shkalla e Punësimit	56,3%	50,2%	Employment rate
Shkalla e pjesëmarrjes në forcat e punës	65,5%	59,9%	Labour force participation rate

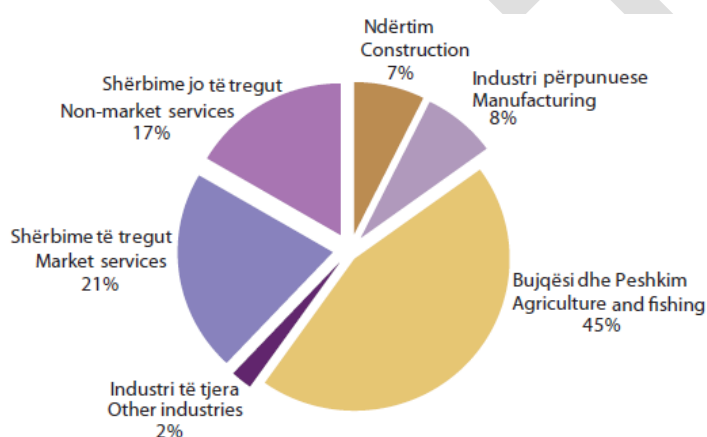
Burimi i informacionit: Anketa e Forcave të Punës 2012, 2013
Source of information: Labour Force Survey 2012, 2013

The labour force participation rate (15–64 years) in 2013 was 59.9% in total (70.2% for males and 50.1% for females)², implying a decrease of 5.6% compared to 2012³. This decline is mostly due to decreasing labour force participation rates among young people and women. Reprocessed data in line with the new International Labour Organization (ILO) standards indicate as low a labour force participation rate as 51.4% in total (63.7% for males and 39.3% for females), (Labour Force Survey [LFS] data covering Q2 2012 to Q1 2013)⁴.

In 2013 the employment rate (15–64 years) fell further to 50.2%, down from 56.3% in 2012. By comparison, the employment rate based on reprocessed data was 40.0% in total (LFS data covering Q2 2012 to Q1 2013).

As mentioned above, total employment was dominated by the agricultural sector and fishing (45%) and the services sector (including market services and non-market services 38%) (see Figure 2).

Figure 2: Employment by Economic Sectors



Source: INSTAT, 2013

Figure 3 shows a similar picture for the employment by groups of occupations: agriculture and service-related occupations represent the biggest groups.

² Source 2013 LFS data: INSTAT, *Labour market 2013*, http://www.instat.gov.al/media/237073/tregu_i_punes_2013.pdf

³ Source 2012 LFS data: INSTAT, *Labour force survey bulletin 2012*, <http://www.instat.gov.al/al/themes/tregu-i-pun%C3%ABs/publications/books/2010/rezultatet-paraprake-nga-anketa-e-forcave-t%C3%AB-pun%C3%ABs,-2010.aspx>

⁴ In connection with the drafting of the NESS 2020, LFS data for 2012 were reprocessed according to the new international standards adopted by the 19th International Conference of Labour Statisticians, Geneva, 2013. LFS data for Q1 2012 were not reliable and hence could not be considered. See, for example, Government of Albania, 2014, Table 9.

Figure 3: Employment by Groups of Occupations



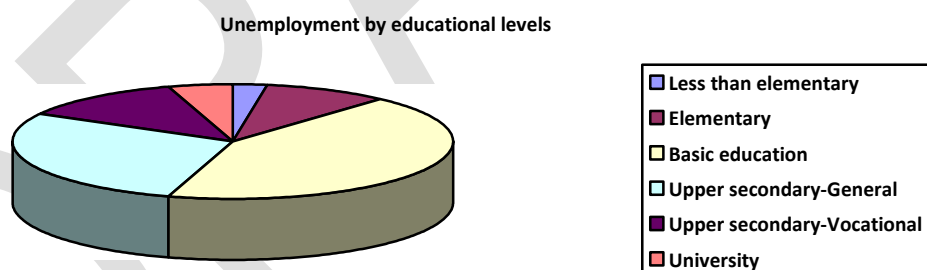
Source: INSTAT, 2013

Almost three out of seven employees work in one of the five sectors construction, public administration, manufacturing, education, and wholesale and retail.

The average unemployment rate (15–64 years) for 2013 was 16.1% in total, 2.2% higher than the previous year. The unemployment rate based on reprocessed data amounted to 22.2% in total (LFS data covering Q2 2012 to Q1 2013). Surveyed youth unemployment (15–24 years) in 2013 reached 31.4%, 1.6% up from the year before.

In Albania, the share of the labour force with tertiary qualifications exceeds the share of jobs requiring tertiary degrees, which can lead to higher levels of graduate unemployment or over-qualification.

Figure 4: Unemployment data by educational level



Source: NES, 2014

In 2013 142 648 persons registered as unemployed, approximately the same figure as in 2012. Active labour market measures could be offered to only 0.58% of jobseekers. The share of persons being unemployed for more than 12 months among the total number of unemployment was 72.4% in 2013, which meant a decrease of 4.7% vis-à-vis 2012.

A distinct feature of the Albanian labour market is the relatively high proportion of discouraged workers (15–64 years), who over 2013 accounted for 23% of all non-economically active individuals. They were not looking for jobs which they believed were not available.

3.2 Main findings from national skill needs analyses

The 2010 Skill Needs Analysis by the National Employment Service, implemented with support from the ILO and covering some 1,000 businesses, showed that more than 70% of the (interviewed) companies belonged to: hotels, cafés, restaurants (30%), trades, car repair, repair of personal items and home appliances (17%), construction (15%), and transport, storage and communication (10%).

However, the picture concerning employment differed, depending on the size of companies in specific sectors. The biggest employers from among the interviewed companies were to be found in the processing industry (11,050 employees in total), the extraction industry and power production, power distribution, energy, gas and water (with 6,385 employees), followed by three other sectors that have employed around 4,500 employees each.

Skills shortages are more typical for the category “specialists with university education (professionals)” in the education (67%) and health sector (60%), sales and services employees of the companies operating in “Trades, Repairing of cars and personal items and home appliances” (45%), “Hotels, Cafés, Restaurants” (69%) and “Transport, storing and communication” (41%). Also assemblage workers, maintenance workers and machinery workers in the “processing industry” have skills shortages. Some businesses declared skills shortages even for workers that do elementary jobs who require very basic skills.

Complementary to the above-mentioned findings, the *2012 Skill Needs Analysis by the NES* noted in addition:

- (i) “Unsuitable qualification level of labour force” seems to be a major problem for most of the businesses operating in the agriculture sector, processing and extraction industry and energy industry, as well as health sector.
- (ii) Most of the companies that claim to suffer from skills’ shortages of their existing employees are medium and large size businesses, with nearly all micro size businesses declared not to have skills shortages among the existing staff. The occupational categories for which skills’ shortages of the existing employees were reported include: “sales and services employees”, “assemble workers, maintenance and machinery workers and “implementation technicians and specialists”;
- (iii) In particular “occupational skills” and “work experience” are difficult to find. Other skills that are to difficult to find within the group of managers and high-level professionals are “creativity” and “organizational skills”;
- (iv) The processing industry resulted to be the most active industry in terms of training provision. “On the job training” is quoted as the most frequently used training;

Companies surveyed by the 2012 SNA reported that the required level of professional competence and work experience is very difficult to find within the category of specialists at operational level, outlining clearly what companies expect from graduates from post-secondary VET programs. One fourth of the surveyed companies anticipate new recruitments for the next 12 months, while almost 75% of them do not anticipate new recruitments. This is related to the fact that a majority of the surveyed companies have declared either unchanged level of turnover and investments or a decreased level of those for the coming year.

The *ETF 2012 Sector Skills Needs Analysis in Albania* gave an overview over 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 qualifications for which businesses had declared in 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 of employees’ skills. The most critical sectors regarding the skills gap resulted to be manufacturing industry, construction, hotels, bar and restaurants as well as car service industry. Almost all the contacted businesses were of the opinion that young people generally lack a proper working attitude, technical knowledge and practical skills. They assessed that the technical knowledge and practical skills could be improved over time through training, but work willingness and culture are not aspects that the company could deal with.

The *2013 Regional Skill Needs Analysis Report on Elbasan, Fier and Lezha*, undertaken by the NES with the support of ILO included the following results:

- Future priority sectors of the Elbasani Region are: (i) Industry, with a specific focus on heavy industry and agro industry; (ii) Agriculture, with a specific focus on several agricultural bio-productions with trade as their main destination, and on forestry; and (iii) tourism, with a specific focus on the development of touristic sites, and all related services including hotels, restaurants, and transport.
- Priority sectors of the Fieri Region are: (i) Industry, with a specific focus on heavy industry and agro industry; (ii) Agriculture, with a specific focus on several agricultural bio-productions with trade as their main destination, and on forestry; and (iii) Tourism, with a specific focus on the development of touristic sites, and all related services including hotels, restaurants, and transport.
- Priority sectors of the Lezha Region are: (i) Industry, with a specific focus on mining industry, wood processing and industry of medical herbs; (ii) Tourism, with a specific focus on the tourism development along the Shengjini coast, and all related services including hotels, restaurants and transport; and (iii) Livestock production followed by the related agro-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 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 labour market demands and what training providers offer; the quality of their curricula and practical experience offered; internship programmes and how students benefit from them, etc.

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:

- (i) Unsuitable qualification level of labour force is a concern for almost all sectors of the economy, but it is a particularly strong concern for three sectors including “Mining and quarrying”, “Electricity, gas, etc.” as well as “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. The average age of the existing employees for such occupations is very high and soon they will retire;
- (ii) ‘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;
- (iii) ‘Low salaries’ are not a real concern for most of sectors, but it seems to be a concern for 47% of businesses in the “Water supply, sewage, waste” sector. It is important to mention that 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;
- (iv) ‘Work culture’ reaches the highest level of concern for the Sector “Administrative and support services”;
- (v) ‘High fiscal burden regarding employment’ results to be a concern for the sector of “Electricity, gas, stream “.

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% and 12.4%, respectively, of the total number of employees in all large businesses. The Garment and Footwear (façon) industry and Call Center 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% and 20.3%, 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, paying a minimum salary of ALL 20,000, or Euro 143 per month, ensures considerable revenues for the investors, as the labour force is more competitive than in other countries.

The 2014 SNA identified the most needed occupations in Albania as follows:

Table 3: The most frequent occupations (grouped by ISCO code) with skills’ shortages

Rank	Albania		Micro & Small only		Medium & Large only	
	Profession	Firms	Profession	Firms	Profession	Firms
1	Waiter	914	Waiter	862	Sewing machine operators	147
2	Bar tender	454	Shopkeepers	438	Waiter	52
3	Shopkeepers	449	Cooks	430	Mechanical engineering technicians	44
4	Cooks	446	Bar tender	425	Shoemaking machinery operator	43
5	Carpenters and joiners	226	Carpenters and joiners	222	Plumber and pipe fitter	40
6	Wholesale salesperson	205	Wholesale salesperson	202	Mobile plant operator	32
7	Sewing machine operators	191	Bricklayers	157	Garment/ Leather cutter	31
8	Plasterer	174	Plasterer	148	Welder	29
9	Bricklayers	168	Mechanical engineering technicians	146	Electrician	29
10	Cleaners	154	Cleaners	131	Bar tender	29
11	Mechanical engineering technician	146	Vehicles mechanic	126	Plasterer	26
12	Machinery mechanic	138	Shelf fillers	121	Driver	24
13	Driver	132	Duralumin structure worker	120	Stock clerk	24
14	Vehicles Mechanic	130	Driver	108	Cleaners	23
15	Shelf fillers	123	Bakers, Pastry-cooks	103	Security guards	21
16	Duralumin structure worker	120	Cashier	102	Call Center operator	19
17	Accountant	111	Accountant	95	Construction engineer	17
18	Bakers, pastry-cooks	107	Machinery mechanics	94	Hand packer	17
19	Electrician	104	Club/Restaurant host	88	Cooks	16
20	Cashier	103	Electrical engineer	86	Accountant	16

Source: SNA 2014

IV. KEY ECONOMIC SECTORS AND THE SKILLS OR OCCUPATIONS WITHIN THESE SECTORS

4.1 Agriculture and Forestry

The share of agricultural production of GDP amounts to 17.3%, from which livestock production accounts for about 55%. The trade volume of agricultural and food sector for 2013 was approximately 729.3 million with a decrease of 4.1% compared to 2012 (the effect of reducing imports by 6.9%, despite the increase in exports by 16.2%). The import / export trade balance reached a ratio of 5.7: 1. According to Agricultural Economic Units Census (2012), the total number of agricultural farms is 324,013, compared with 350,654 in 2010.

In 2013 the development of the agricultural sector was characterized by increased production and yields in most agricultural activities (plants and livestock). As a result of the specialization of farms there is a change in the structure of sowing the crop that has gone in favour of fruit trees, olives, and vineyards. Slight increase compared to last year is observed in fruit trees, especially grapes with +2.3%, milk production with +4.5%, honey with at +4.5% and +3% eggs. The exception is easy decrease the production of cereals (mainly wheat) as a result of the long drought. Also, increasing vegetable production has come as a result of: (i) the trend of farm specialization; (ii) increasing the area of greenhouses; and (iii) increasing efficiency of agricultural production per unit of area (using modern technology, more efficient choice of inputs, mainly of planting and propagating plant).

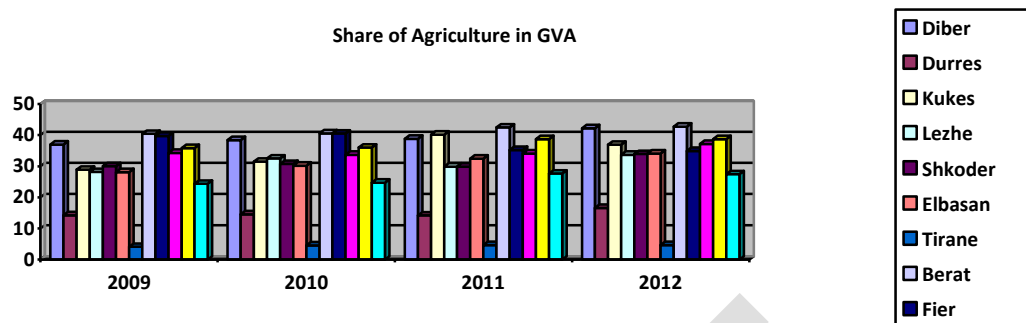
Livestock production represents the majority of the agricultural production. The focus in a certain production has resulted in an increased number of livestock farms breeding a considerable number of bloodstock animals. Milk production increased due to improved livestock nutrition, improved breeding environment and increased artificial insemination. Livestock farms which have operated as mixed farms nowadays are headed into their specialization with a predefined production direction that affected the increasing number of farms that breed a significant number of animals. Meat production accounts for about 46.6% of livestock production, where the largest share of voice is produced from bovine meat (about 46%).

Organic farming is being consolidated from year to year. Support schemes for organic farming have given its effect, since a large number of beneficiaries have enabled the growth of organic area in the country, the number of organic operators and competitive opportunities in the local market and abroad.

Forests cover 36% of the territory. They consist of high forests (45.7%) and thickets (54.3%). Forests in Albania are used for protection and production, to meet customer needs for wood (in wood industry, construction, etc.), for firewood, and other functions (like control erosion, biodiversity conservation, recreation, tourism, hunting, sports, etc.).

Agriculture is a main source of employment and income in rural areas, accounting for 45% in 2013 employment in the country down from 71.8% in 2000. Furthermore, the SNA 2012 reports that “unsuitable qualification of labour force” (6%) and “attitude of jobseekers” (50%) is major constraints within the agriculture sector. The prefectures with the share of agriculture, forestry and fishing in the generation of gross value added compared with the national average are presented in the table below:

Figure 5: Share of Agriculture in GVA



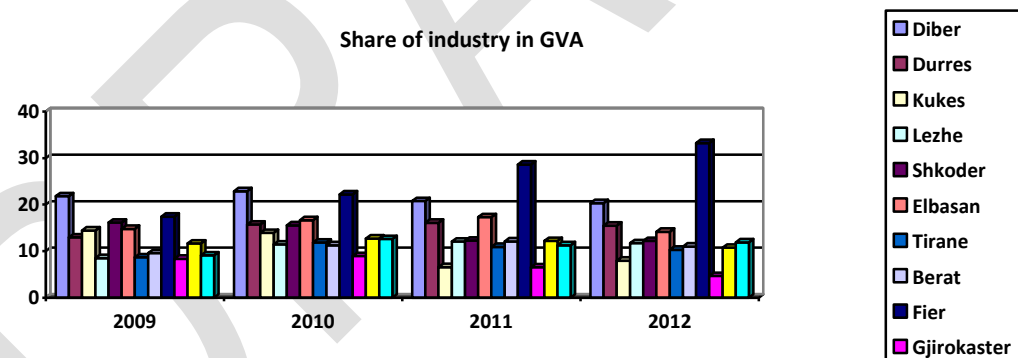
Source: INSTAT 2013

In the framework of this research several experts were consulted from the Ministry of Agriculture, as well academics from the Agriculture University of Tirana, in different subsectors of Agriculture, Livestock, Forestry and Fishing.

4.2 Food processing industry

This industry branch of economy (by NACE) generated 14.43% of the national gross value added. The range of industry increased by 0.17% compared to 2011, the share of industry ranged from 4.68% in prefecture Gjirokastër to 33.2% in prefecture of Fier. The share of the generation of Gross Value Added for the branch of industry is presented in the table below:

Figure 6: Share of Industry in GVA



Source: INSTAT 2013

Agro-food industry has a gradual and steady development in recent years by providing an average annual increase in value of above 3 % in 2012. However, the agro-food sector continues to plummet still low overall agricultural production (around 24 %) despite the growth performance of the production of agricultural raw materials in the country. Export Level of processed agricultural products to EU markets remains very low compared with the value of imports from the EU, with exports worth covering only 1, 02 % of the total value of imports. This phenomenon can be explained by the fact that agro-processing sector is emerging mainly focused on meeting domestic demand. By 2013 the food processing industry was dominated by small processors that employ between 2-10 people. Only 10% of the businesses in this sector have more than 50 employees. Agro-business is rapidly developed centered upon the fruit processing (grapes, olives, sunflowers, etc.).

Food processing industry includes subsectors, such as: Dairy, Meat processing, Olive oil processing, Wine production, fruits processing, fruits and vegetable collecting/freezing, farina processing, etc. It comprises mostly small companies, as it is a small but rising industry in the Albanian economy. From

the statistical data for 2013, is noted that there is a gradually increase production in the sausage and ham; fruit juice, milk processing; producing of canned vegetables; wheat flour; etc. But also during this period, there was a decrease in the production of pasta with 60%; as well as olive oil.

The regional skills needs analysis (NES 2013) found that there is an evident call for employment of implementation specialists such as food technologists and cost accountants particularly in Durrës and Fieri. Due to SNA 2014 findings, the most frequent occupations (grouped by ISCO code) with skills' shortages in this sector were food processing and related trades workers. The total number of employees in this industry is slightly more than 11,000 but the tendency is positive.

In the framework of this research were approached agro-processing companies, and intermediary organizations like ADAMA, as well representatives of MoA, where the expert's discussion was focused on a better articulation of the demand for skills in most of the subsectors of Agro-processing. The wine productions represented by the Durres wine production enterprise declare those qualified tasters are missing in the labour market. Supervisors/quality & standards controller is mostly missing in the sector as well chief of The most difficult occupation in this sector as a whole to be filled by the labour market supply is food technologist and laboratory technician. The meat processing sector also needs supervisors for production process with management and organizational skills as well as knowledge on technological process and cost, and also butchers. The olive oil and fishery processing industries declare that food technologist is the hard to fill job category, as well as laboratory technician positions. The used technology in the current businesses is not advanced. Milk processing companies declare that vocational training is needed for supervisors, implementation specialists (higher technicians) for pasteurization, and machine maintenance and repair, production and/or production line supervisor.

The quality for the finished product of the food processing industry is very much related with the quality of the raw material as the processing cannot overly improve quality and safety of the finished product. For that reason well-trained agronomists are needed to improve the structure of production, crops varieties as well as quality. Furthermore, qualified livestock breeders are needed in order to produce the meat needed in country, which mostly is imported by North America countries. This tasks fall under the Extension Service regional departments and policies of Ministry of Agriculture, Water Administration and Fisheries.

4.3 Extracting Industry

Albania is a country rich in oil and mineral resources. Search – discovery, exploitation and processing of these underground assets, constitutes a significant component of the economy. 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 the industrial oil sector and 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. Based on the information officially sent by INSTAT, in 2011, the extractive sector comprised about 1.7% of gross domestic product (GDP). Also referring to the information officially sent by the Albanian Custom Administrative, total exports of the sector amounted to 49.75 milliard ALL or 25% of total exports in 2011. 71.4% of the “Mining and quarrying” sector is composed of micro and small size businesses. This indicates what it is known that the activity of this sector in Albania is still fragmented, having a low productivity rate and being far from desired standards; its processing capacities are very low and it involves a high number of informal workers, including children.

Due to SNA 2014 results, “Mining and Quarrying” is the sector experiencing growth in the last 12 months. In all three indicators (turnover, number of workers and investments), this subgroup's businesses declared an “increased” value. Thus, 46.0% of the Mining and Quarrying companies increased the investment during last 12 months, versus 16.6% that decreased their investments. 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, as a big part of the heavy industry facilities in Albania. Due to the consultation with the representatives of Bulqiza Mine (Bulqiza is the richest area with chromium mineral in Albania and has a high quality mineral) there was a need for armator, mining explosives worker, markesheder, safety rules, etc.

4.5 Manufacturing (Processing) Industry

The manufacturing (processing) industry (non-food industry) shows a steady upward trend since the global economic and financial crisis in 2008. INSTAT reported that the GDP contribution of the manufacturing industry went up to 11.1% (2011) from 9.3% in 2008. Manufacturing (processing) is a relevant source of employment and income in mainly urban areas such as the central regions around Tirana, Durres and Elbasan as well as Shkodra in the northern part.

The Metallurgical industry⁵ is represented from the recycling of metal scrap and ferrous chrome production that have been increased from year to year: it has used existing premises and its industrial renewal of technology enabled it to appear in the internal, regional market and beyond. In 2013, there are processed about 600 thousand tons of metal scrap and produced about 23 thousand tons of ferrous chrome per year. There is potential for this industry in the metallurgical processes for the treatment of copper and nickel ores.

For the purposes of this study, with support of NAVETQ, there were conducted meetings with the representatives of 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, as a big part of the heavy industry facilities in Albania. Due to the consultation with the representatives of Ferro-Chrome factory of Elbasan there was a need for workers of metal processing, panel control operators, metal merging worker, observer of the metal melting processes, electro, etc.

The mechanical industry is represented mainly by micro enterprises with 2-5 employees that produce metal constructions, aluminium products for construction, special spare parts for various industries, etc. Its development is conditioned by the development of infrastructure and construction. This industry has failed to develop the production of spare parts and technological equipment required by certain branches of industry, especially from mining, food, etc., and is focused mainly in the services sector and maintenance. Due 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.

Wood processing industry has a long tradition and it is experiencing a normal trend of development. It is represented mainly by small and medium enterprises working mainly based on orders for final products. In 2013, most of the enterprises in this sector were involved in the production of final products (furniture), and the rest in producing sawn materials, employing 4500-5000 employees, with revenues ranging around 20-22 million. Its exports constitute a value of about 4 million Euros in half fabricated wood materials. The products of this industry are meeting not only the domestic demand, but also their presence is becoming apparent even in regional markets.

⁵Strategy for the Development of Businesses and Investments, 2013

The chemical industry is characterized by many small, medium, large private enterprises, which realize products in the field of chemical industry as paints, detergents, Styrofoam, oils, adhesive for building products, etc.

Textile clothing sector. The garment companies represent outward processing companies, Albanian or joint-ventures with Italian, Greek or other western countries companies. The industry is highly competitive with many companies operating in labour-based assembling processes of clothing. The industry inputs are mainly supplied by imports, using the cheap labour advantage. The garment firms have no special technological processes, no marketing strategies and poor vertical integration, consequently leaving abroad most of the value added in this sector. Huge number of garment producers is found in almost all main cities of Albania, employing critical mass of women coming from rural and suburb areas in 100% Albanian owned or joint ventures, they are all competing for specific processes/orders coming from foreign companies to take place in Albania. Although the companies have been in operation for many years, they have not developed other skills, besides time and resource productivity for the specific processes that they apply. Other skills would be designing, innovation and marketing for niche markets for which they feel risk averse. Packaging takes place as part of assembling processes, based on specifications and conditions set out by western partners. No Albanian origin is acknowledged. Such companies do not have their own market with some exceptions, where the products is not at the quality required. Besides these companies, there are others that prepare clothes for domestic and foreign market. On the other side, a few cases are identified on small fashion houses designing unique garments.

From the consultation process results that the employers complain that they could not find workers with the skills they want and also skilled workers for certain work processes, such as: Mechanics for textile machines, production supervisors, quality controller, cutters, modellers and fashion designers.

Leather and footwear field is one of the most rapidly growing industries in Albania. A significant part of footwear enterprises didn't change their destination, they kept producing leather products but their activity was now concentrated on production under outward processing regime of footwear which comprise the majority of the Albania's exports. Skilled workforce is needed for the repair and maintenance of mechanical and electrical equipment and machinery within the footwear industry. The footwear production companies operate mostly on *façon* base. Their production is all for export in international markets. Production technician, supervisors, shoe stamp producers and shoe modelling experts are needed.

Due to 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

Creative economy is considered as a promising economic sector with the potential to contribute the local economy, regional and national, as well as job creation. According to a study by GIZ in 2011, the contribution of the creative economy in Albania is approximately about 0.5% - 1% of GDP. In most developed countries, craft economy contributes about 3% of GDP. Creative sector provides about 3,500 jobs, or 0.5% to 1% of the workforce. 56% of all employees in this sector are women, with the greatest concentration in the clothing (> 90%) and the handicraft (78%). A large part of the employees in this economy are artisans with 37%. Their products in their vast majority, inherit and follow the earlier representation of the country tradition, that of the coarse pottery. As a raw material for their products is used domestic raw material, the level of craft and technology is still handicraft and affects the increase in quantity and quality of their production. In general these lines are considered small, in which do not work more than two to four specialized employees.

A considerable number of artisans have a family history of that same activity as a background. This number accounts for more than 60%. 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.

4.6 Energy and Water supply Industry

Albania is rich with various sources of energy, oil and gas, coal and other fossil fuels, to hydro power, biomass, natural forests and other resources for renewable energy. Hydropower accounts for over 97% of the electricity produced. In 2013, the Government embarked on a major reform of the power sector, including unbundling the state-owned electricity company (separate generation, transmission, and distribution companies), privatizing its distribution and retail supply, and taking steps to liberalize the electricity market. Private sector participation in generation is very limited to date, covering only a small percentage of the hydro market.

The energy distribution sector will continue to employ the largest number of workers in the energy sector and the main needed qualification is an implementation specialist (higher technician) for power electric. The construction of hydro power stations is mostly subcontracted to construction companies.

Albania will become a central transit country for energy delivery in the European Union, but also for the diversification of gas supply, as well as marking the opening of the Southern Gas Corridor to Europe. Trans Adriatic Pipeline (TAP) project is expected to spur economic development and job creation along the pipeline, including Albania. This will be a major source of foreign direct investment that does not depend on grants or subsidies.

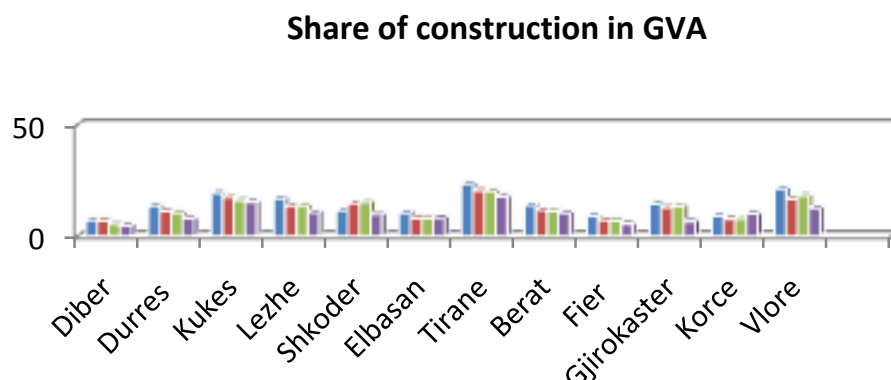
Due to SNA 2014, most frequent occupations (grouped by ISCO code) with skills' shortages in this sector were process control technicians and electrical equipment installers and repairers.

4.7 Construction Industry

The Construction sector generated 12.15% of the national Gross Value Added. The share of construction ranged from 4.69% in prefecture Dibër to 17.81% in prefecture of Tirana. Construction is the sector which in fact is for years in a crisis, for a variety of causes, linked with the decline of remittances, accreditation shrinking, blocking of construction permits by the municipalities and communes, etc.

Construction enterprises are trying to face the new environmental and energy-related issues by becoming greener but the sector currently lacks skilled workers capable of meeting the energy efficiency challenges. Information and training plans must be developed so that construction crafts and SMEs are fully knowledgeable of the legislation, can carry out energy performance evaluation and advise the clients.

Figure 7. Share of Construction in GVA



Source INSTAT 2013

There is a strong customer demand for increased quality of construction work throughout the country. "Greening" the construction sector might play an important role in the future. Post-secondary VET qualifications related to retrofitting and energy and resource (e.g. water) efficiency, as well as "green" plumbers, "green" important given the government's industrial policy targeting sustainable development. The Skills Needs Analysis 2012 reports that the construction sector does not face a serious skills shortage (18.5 %) of the existing employees. Additionally the SNA 2014, found that the most frequent occupations (grouped by ISCO code) with skills' shortages in this sector were: building frame and related trades workers, building finishers and related trades workers, physical and engineering science technicians, engineering professionals, and electrical equipment installers and repairers.

4.8 Services Sector

The term services sector includes sectors such as trade, hospitality, transport, education, health and others that are sometimes drawn together in common when considering the employment and GDP trends. According to INSTAT, the employment figures of the entire service sector have made a steady increase from 35.7% (2011) to 38.9% (2013). A similar trend can be observed for the GDP trend, starting from 48.7% (2009) up to 47.31% (2012), albeit with a low decline level for the GDP. Both trends indicate that the Albanian economy is still on the way to become a service dominated economy. In the service sector, there is a clear tendency towards the broadening of the required skills portfolio at all occupational levels, linked to "non-routine" tasks. For example, ICT professionals have to develop skills in marketing or management; services workers have to develop customer orientation skills and digital literacy. In many knowledge-intensive sectors, both managerial skills and scientific knowledge are needed. In social care and education, further skills upgrading is needed to improve the quality of services. Service sector "low-skilled" jobs increasingly include more demanding non-routine tasks; yet there is still little financial recognition of the new competencies and skills necessary for these jobs in the wage structure.

The *trade sector* is dominated by micro, small and medium size enterprises (MSME's). These types of enterprises are particularly constrained by bureaucratic obstacles, lack of compliance with European standards and norms, and inadequate managerial knowledge. Albania needs to consolidate appropriate standards of corporate governance and business conduct, limiting the informal practices that are still common among micro, small and medium-sized local companies. Due to SNA 2014 findings, the most frequent occupations (grouped by ISCO code) with skills' shortages in this sector were Shop salespersons.

Tourism and Hospitality. The direct contribution of Tourism and Hospitality to the Albanian GDP in 2012 was 6.1% up from 5.1 % in 2005. This primarily reflects the economic activity generated by industries such as hotels, travel agents and airlines (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure services directly supported by tourists. Most of the tourism companies are small-medium size, family owned experiencing 'short' vision from owners/ investors to develop HR resources accordingly to international standards. This determines lack of persons in charge for HR procedures and policies within companies; lack of on the job periodic training programs; short vision toward skills development. The hotels located in the cities tend to have permanent staff, while those that are located in the coast hire workers on seasonality basis.

A tourism value chain includes travel organization and booking, transportation, accommodation, food and beverage, handicrafts, touristic attractions and destinations, leisure, excursions and tours as well as various support services including operation and maintenance.

Tourism product development is part of an extensive and interlinked process involving market research, product development and marketing. Sustainable tourism is applicable to all forms of tourism in all types of destinations. Principles of sustainability refer to the environmental, climate change, biodiversity, economic, and socio-cultural aspects of tourism development. A suitable balance

must be established between conservation, community, culture and commerce (C4 Approach) to safeguard sustainable interventions.

From the SNA 2014 findings, the most frequent occupations (grouped by ISCO code) with skills' shortages in this sector were Waiters and bartenders, Cooks, Other personal services workers, and Client information workers.

Transport and Storing Services. At present, transport, storing and communication services are employing around 26.000 (INSTAT 2011) employees. The expansion, improvement, safety, and management of the road network are critical for Albania's development. Regional and local roads have been found to be in particularly bad condition, and the government is implementing a considerable investment program to improve access for rural communities. In partnership with several European institutions, the World Bank is supporting the sector through the Secondary and Local Roads Project. Due to SNA 2014 findings, the most frequent occupations (grouped by ISCO code) with skills' shortages in this sector were Transport and storage workers, Physical and engineering science technicians, and Car, Van and Motorcycle Drivers.

The car repair workshops on the road-side are either small or medium size with a limited number of highly qualified employees. Even though they have a limited structure, their needs for skilled workers are permanently increasing due to ongoing technological change within the automotive sector. Given the fact that nowadays modern high sophisticated cars are used in Albania, there is demand for employment of implementation specialists (higher technicians) for automotive mechatronic in order to repair cars of this calibre. Due to SNA 2014 findings, the most frequent occupations (grouped by ISCO code) with skills' shortages in this sector were Machinery mechanics and repairers.

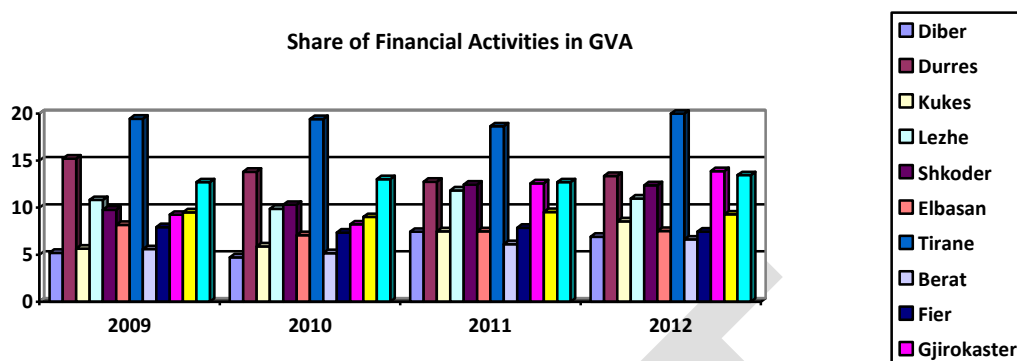
Communication Services. Internet and communication technology services are rapidly expanding in Albania because they are both a stand-alone service as well as a cross-cutting enabling technology service sector for other industries. The ICT sector in Albania include IT companies, Telecom operators, Call Centres and does serve to a great number of consumers such as telecommunication, financial sector, public administration, private businesses, individual consumers and home users. There are four mobile network operators and many internet service providers. The fixed incumbent, Altelecom, and other operators provide fixed telephony. By the end of 2011, mobile penetration had reached 185 %, one of the highest rates in the region. The proportion of internet users has increased rapidly to 50 per cent of the population, and international internet connectivity has increased fivefold compared with two or three years ago, but fixed telephony — even though it has grown slightly — remains low at 12 per cent.

The cost of labour in the ICT industry is up to five times lower in the Western Balkan economies than in Hungary or Poland. In addition, proximity to EU and other regional markets makes the Western Balkans a prime location for companies interested in outsourcing some of their operations. For back office services and call centres, language capabilities are strong across the region, especially in English, German, and Italian. Due to SNA 2014 findings, the most frequent occupations (grouped by ISCO code) with skills' shortages in this sector were Database and network professionals and Telecommunications and broadcasting technicians.

The sectors of financial activities, real estate and business activities generated 3.77 % of the national Gross Value Added. This branch increased by 0.52 % in comparison to 2011. Based on statistical region, the share of financial, real estate and business activities ranged between 6.62 % in prefecture Dibër and 19.98 % in prefecture Tirana. According statistical analysis the prefecture of Tirana and Gjirokastër exceeded the national average. 78.3% of the "Financial and Insurance" sector is composed of small businesses because of the Exchange Offices and the Insurance Agents. The Albanian banking sector has remained stable during 2013. The volume of activity grew and the financial performance improved. The banking sector's liquidity and capitalization ratios were at an adequate level during the period. The prefectures with the share of Branch of Financial activities, real

estate and business activities in the generation of gross value added compared with the national average are presented in the table below:

Figure 7: Share of Financial Activities in GVA



Source: INSTAT

4.9 Health sector

The health sector employs around 28.000 people (INSTAT 2011). The level of employment of the health care sector increased slightly from 2005 (2.6 % of total labour force) to 2011 (3.0 %). Furthermore, the reported sector-wide skills shortage of 7.5% (SNA 2012) within the health institutions is low, though the reported specific skills shortage of 20% (SNA 2012) for implementation specialists is higher. It can be assumed, that the employment potential of this sector is quantitatively well exploited, but questions are arising about the quality of health care services within the country. Health sector as a public service is expected a detailed inventory of the existing human resources in order to introduce a deep reform in this sector which is currently under financed and under developed.

4.10 Maritime sector

Maritime sector seems to be still underdeveloped and under-regulated. According to the Law No. 10 109, dated 04.02.2009 "On the Maritime Administration in the Republic of Albania", Ministry of Transport and Infrastructure, represented by the Maritime General Directorate is the responsible institution in the country for the implementation of Maritime Conventions ratified by the country, respectively marine activities including the training of seafarers. Due to international standards it is really important that compulsory safety modules, like personal techniques of survival at sea, the prevention and fire-fighting, basic first aid, personal safety and social responsibilities, training for seafarers with special security tasks on ships, theoretical aspects and practices of the acquisition of competencies for marine services at the deck will be approved by this Ministry in order to be part of VET provision in different levels..

From the consultation with the relevant stakeholders there is an evident need for skilled working force in maritime transport technology, use of cargoes and cargo handling equipment, marine engineering, marine machinery and auxiliary systems, electrical and electronic engineering and service and maintenance, watch keeping, skipper, etc. Aquaculture has shortages for both skilled and unskilled workers (trained and qualified staff particularly in peak periods), e.g. farm hands, packers, operations staff, farm managers, and hatchery technicians.

V. SKILLS OR OCCUPATIONS REQUIRED BY THE REGIONS

*“Schools should be like supermarkets”
Kastriot Shtylla, Kamza businessman*

In this chapter we present in a summative way the outcomes from consultations in all 12 Albanian regions, in terms of what should be offered where with a view to inform a possibly re-organized network of public VET providers. The identified needs for qualifications are consistent with regional economic development priorities and trends in employment.

As mentioned in the Methodology (Chapter 2), the 13 regional workshops (12 regions plus one additional workshop in Kamza) brought together approximately 350 participants from private enterprises, business organization central and local authorities, NGO, experts and consultants, labour offices, private and public VET providers, universities, unions, etc. After introducing participants briefly to the objectives of the National Employment and Skills Strategy (NESS) 2020 and the main findings from the 2014 GIZ-ETF Baseline Survey of Public VET Providers, three questions were put forward for discussion:

- What are those positions, functions, tasks for which you need qualified people?
- What are those positions, functions, tasks which you have more difficulties in finding qualified people?
- What are those positions, functions, tasks in which you need additional staff qualifications?

The discussion produced a lot of information on relevant sectors and missing qualifications, occupations, skills, duties and tasks needed by individuals to allow companies to increase their competitiveness and profitability. All participants stressed that well qualified human resources are considered a competitive advantage. Different types of skills mismatches coexist, including skill shortages, qualification mismatches and skill gaps. Although employers tend to attribute these perceived shortages to skill deficits among job applicants, they are often explained by other factors, such as geographical mismatch between skill supply and demand, poor working conditions and inefficient or stringent human-resource practices.

Participants helped identify the main mismatches between the private sector and VET providers and gave recommendations as to how cooperation could be better supported in the future.

For each region below, first economic statistics from different sources are provided and then a table summarising the discussions at the regional workshops.

5.1 Korca

Regional Context

Korca region generates 6% of added value in the national level. In the private sector the majority are employed in construction, textiles (tailoring) as well as trade. Economic development is mainly based on agriculture economy where the main branches are: agriculture, livestock, forestry and fishing, which account for 30% of the total product in the region of Korca, with a slight increase of the livestock production. In the food processing industry, the priority sectors are: Grain/ corn/ dough processing industry; Meat, dairy, fruit and vegetable processing industry; Industry alcoholic beverage production; and Canned food industry, sausage, etc.

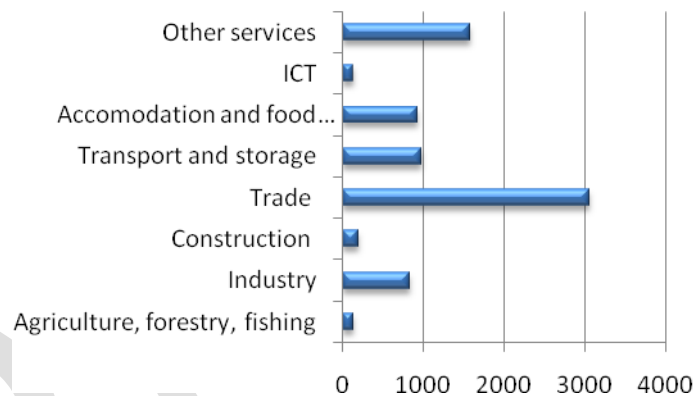
Figure 8: Active Enterprises by Size and Economic Activities in Korça

Active enterprises by size



- 1-4 employees
- 4-9 employees
- 10-49 employees
- 50+ employees

Active enterprises by economic activity



Source: INSTAT 2013

According to the feedback obtained during the consultation there was an evident need for qualified employees in the fields of the agriculture in terms of farming, agro-tourism, agribusiness, etc even though the statistics are not so much in favour of such a situation. There was also clearly articulated that the local livestock farming does not cover the minimum needs of the meat processing companies in Korca, mostly because of the low skilled workers and scarce knowledge in livestock farming, as well as other related issues linked with framework conditions to do business. The businesses stressed that the farmers needs to be trained and supported how to make business sustainable. The beverage sector was mostly suffering from the lack of the professionals in chemical engineering technologist who currently were imported from Tirana. Since tourism is becoming a more relevant income sector, the respective services are facing difficulties in finding skilled staff in occupations like waiters, cook, managers, etc. as well as the need to diversify touristic products in order to make of all the natural, traditional and cultural heritage resources.

The textile, clothing and leather sector is currently extended bur this is not supported by a qualified working force especially in fashion designer and modeler, which in fact would have been an added value to facilitate branding and products development in their own. Meanwhile the other sectors like construction and related occupations, mechanical etc. were demanding professionals with additional ICT/automation or other new emerging technologies. In addition, the need for skills linked with business management, leadership and entrepreneurial capabilities was articulated as really important. Although, in the Korça region there are altogether seven vocational schools and one vocational training centre operating, there is a skills mismatch which is illustrated by the table below:

Regional consultations

Table 4: Regional consultation results in Korça

Priority or potential economic sector	Needs for occupations in specific sectors	Needs for regulated occupations	Other relevant skills/issues	Existing VET supply/offer	
				VE Direction in Secondary Education	VT Course
Agriculture and forestry	Livestock farmer Veterinary Farmer Arbiculture Skilled agricultural workers to protect crops Skilled agricultural workers for organic products Rural Water Management Marketing specialist of agricultural products Agro-tourism Agro-mechanics		Farmers should be trained to raise cattle properly	Agriculture (x2) Agricultural Economy	
Food processing	Processing of fruits and vegetables Butcher Skilled worker in fruit storage technology Chemical engineer for food processing Laboratory technician	Qualified butcher Qualified technician in meat processing (procedures and technology)		Food technology	
Textile , clothing and leather industry	Tailoring/sewing machine operator for shoe making sector Cutter for the shoe making sector Line supervisor for the shoe making sector Quality controller Fashion designer for the shoe making sector Styling for the shoe making sector		*no parent though would be very happy to send children to work in a textile/shoe making factory	Textile-Confection	Tailoring
Hotel –restaurant, tourism	Waiters Bartenders Cook Managers (Hotels/restaurants) Tourist activities			Hospitality- Tourism (x2)	Cook

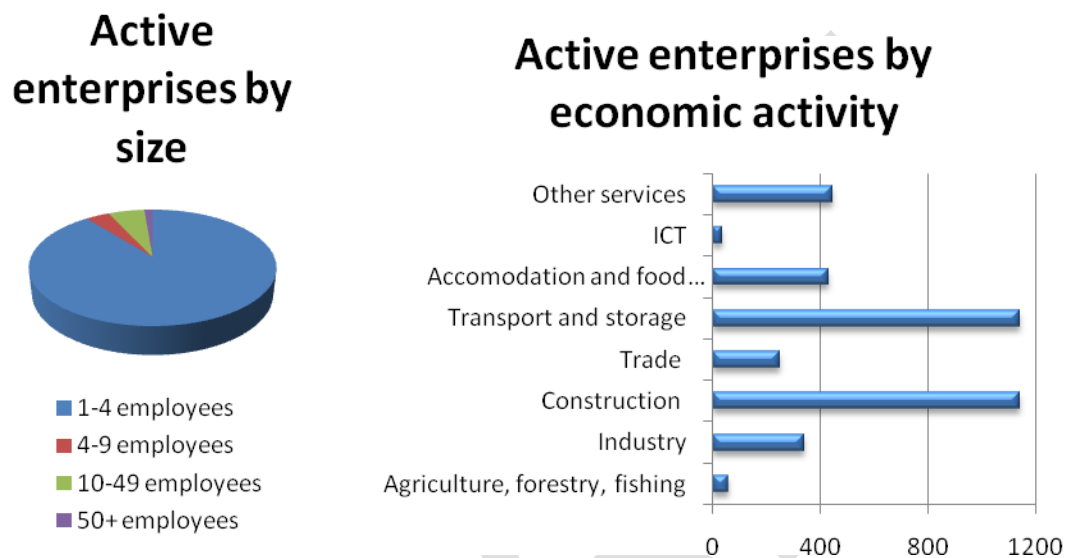
Priority or potential economic sector	Needs for occupations in specific sectors	Needs for regulated occupations	Other relevant skills/issues	Existing VET supply/offer	
				VE Direction in Secondary Education	VT Course
	Development of touristic products				
Construction	Bricklayer Tiles layer Construction technician	Qualified bricklayer Qualified tiles layer	Need for more ethics and dedication at work	Construction	
Water supply and sewage	Plumbers			Installer of Thermohydraulic Systems	Solar Panels Plumber
Transportation means engineering	Electro-auto repair Manovrator for construction machinery	Qualified manovrator/operator of heavy machines in construction		Transportation Means Services	
Mechanical engineering	Agro-mechanics Repairing of cooling/refrigerator equipment			Mechanics (x2)	
Energy, automatization and electrical engineering	Electricians for civil constructions			Electrotechnics	Electrician
				Electronics (x2)	
Administration and business and financial services	Economist for the Textile, clothing and leather industry industry		*even university graduates in Economics do not have the skills and know ledge needed in the private sector	Economy / Business (x2)	
				Economy Business / Office Administration Information and Communication Technology (ICT)	
				Wood processing	Wood work
				Geodesy	
					Cosmetics
					English
					Computer

5.2 Gjirokastra

Regional Context

Gjirokastra is the largest city in the region and among the main cities of Albania. Gjirokastra district has an area of 2.884 km² with a population of 72.578 inhabitants registered. At the regional level, GDP per capita in Tirana is about 35% higher than the national ones (4439 euros), followed by Gjirokastra (3382 euros) and Durres (3276 euros). Contribution to GDP is insignificant in Gjirokastra.

Figure 9: Active Enterprises by Size and Economic Activities in Gjirokastra



Source: INSTAT 2013

Businesses in this workshop were really eager to state their needs regarding several sectors starting with hospitality, tourism and restaurant which in fact should be supported with the skilled employees in order to take advantage from the natural, historical and cultural heritage of the region.

Still Gjirokastra region has potential to develop agricultural sector which in fact currently was suffering from a strongly fragmented market with due to the outdated technology and knowhow. Agro processing (especially in some districts such Permet) has revived the tradition of fruit and vegetable processing, as well as vinery production, honey production etc.

Regional consultations

Table 5: Regional consultation results in Gjirokastra

Priority or potential economic sector	Needs for occupations in specific sectors	Needs for regulated occupations	Other relevant skills/issues	Existing VET supply/offer	
				VE Direction in secondary education	VT Course
Textile, clothing and leather industry	Tailoring/sewing machine operators		*currently approx.200 free positions for tailoring/sewing machine operators are reported from one of the textile companies		
Hotels, restaurants and tourism	Cleaning ladies Cooks	Qualified cooks	* the problem is also how to keep the employees (waiters etc.) all year long when there is not much business *more focus on cultural tourism		Cook
Energy, automatization and electrical engineering		Obligatory licensing for: Electricians		Electronics	Electro Installations
Mechanical engineering	Mechanic for tailoring/sewing machines Mechanic for paper producing industry	Qualified lathe operator			Welder
Construction	Building restoration worker			Installer of Thermohydraulic Systems	Plumber
Agriculture and forestry	Farmers		*most of the agriculture land is not used		
Food processing	Fruit processing technicians		*need to create branding for		

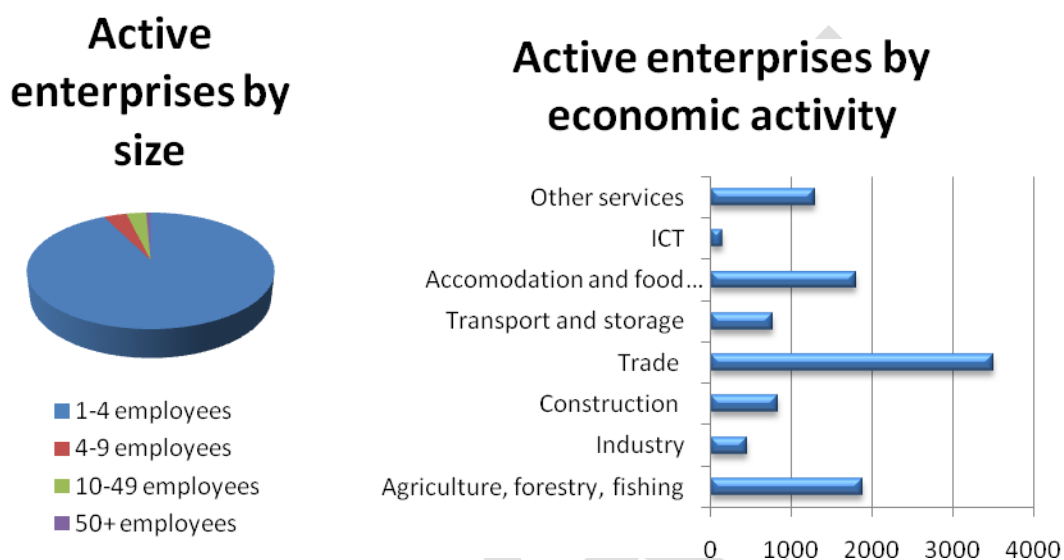
Priority or potential economic sector	Needs for occupations in specific sectors	Needs for regulated occupations	Other relevant skills/issues	Existing VET supply/offer	
				VE Direction in secondary education	VT Course
	Enology specialist		Gjirokastra (or Permet) products		
Transportation means engineering	Automechanics	Licensed Auto mechanics		Transportation Means Services	Autoservis
Handicrafts	Stonemason Jeweler Embroidery Restorer Wooden handicraft				
				Information and Communication Technology (ICT)	Computer
Other services	Protection/Security professional		*mainly these companies report that they recruit people via family and acquaintance affiliations *it is also reported high informality in these companies		
					Wood work
					Greek English
					Social Operator
					Hair-dresser
					Secretary

5.3 Vlora

Regional Context

Vlora has a favorable position at the intersection of roads, navy, air throughout the region. The Vlora region generates only 6% of value added at the national level. Fier and Vlora come next to the ranking in terms of the number of active businesses, along with over 15% of total large businesses ones. Meanwhile, the registered unemployment rate is about 13% nationwide, but particularly high in Vlora (19%).

Figure 10: Active Enterprises by Size and Economic Activities in Vlora



Source: INSTAT 2013

From the consultation there is an evident need for skilled working force in maritime transport technology, marine engineering, marine machinery and auxiliary systems, electrical and electronic engineering, skipper, etc. Aquaculture has shortages for both skilled and unskilled workers (trained and qualified staff particularly in peak periods), e.g. farm hands, packers, operations staff, farm managers, and hatchery technicians.

Tourism sector seems to be the most promising economic sector in Albania, but in order to have a strong potential for growth it needs sound human resource development practices in the whole tourism value chain. The businesses in this consultation reported that their staff is mostly trained on the job in Albania or abroad.

The recently emerging service is Telemarketing, which is an opportunity for many young people in the urban areas of Vlora region.

Even though in the Vlora region there are altogether three VSSs (one in Saranda) and one VTC operating, many sectors were experiencing to a certain extent the subcontracting of qualified experts out of Vlora, due to the lack of skilled workers in the regional market.

Regional consultations

Table 6: Regional consultation results in Vlora

Priority or potential economic sector	Needs for occupations in specific sectors	Needs for regulated occupations	Other relevant skills/issues	Existing VET supply/offer	
				VE Direction in Secondary education	VT Course
Maritime	Ship building industry Marine machinery and auxiliary systems Fishing industry Skipper Navigation Aquaculture	Qualified skipper/navigation	*there is an emergent need to be further regulated by the Ministry of Transport		
Agriculture and forestry	Arboriculture specialists Farmer Oil production Sommelier Milk processing				
Mechanical engineering	Mechanic for heavy machinery Metal construction	Qualified metal technician Qualified mechanic for heavy machinery		Mechanics	Welder
Construction and related occupations	Maintenance worker Manovrator for construction machinery Carpenter	Qualified plasterer Qualified manovrator		Construction	
Hospitality and tourism	Manager (restaurant/hotel) Cook Waiter-bartender Development of Touristic products				
Other services	Telemarketing services Telemarketing consultant		*Italian language knowledge required		Foreign language

Priority or potential economic sector	Needs for occupations in specific sectors	Needs for regulated occupations	Other relevant skills/issues	Existing VET supply/offer	
	Assistants Technicians				
				Electro technics	Electrician
				Installer of Thermohydrolic Systems	Solar Panels Plumber
				Transportation Means Services	Autoservice
				Information and Communication Technology (ICT) (x2)	Computer
				Economy / Business (x2)	
				Hospitality- Tourism	Cook
					Hair-dresser Esthetics and cosmetics
					Wood work
					Tailoring

5.4 Fier

Regional Context

Fier is one of the regions with significant weight in GDP, where generated over 9.8 % of added value at the national level. The three main contributors in the Regional GDP are the following sectors: (i) Industry; (ii) Agriculture; and (iii) Trade, hotels and restaurants. In the rural areas, agriculture is the main sector of employment for almost all rural population. The agricultural production of the region represents about 19% of the total agricultural production of the country. Wheat, maize, vegetables, and commercial plants cover about 86% of the arable area of the region. Fruit trees including olive in particular accounts for about 8% of the national total. In addition, livestock production accounts for about 15% of the national total. Meat, milk and egg production is also very significant.

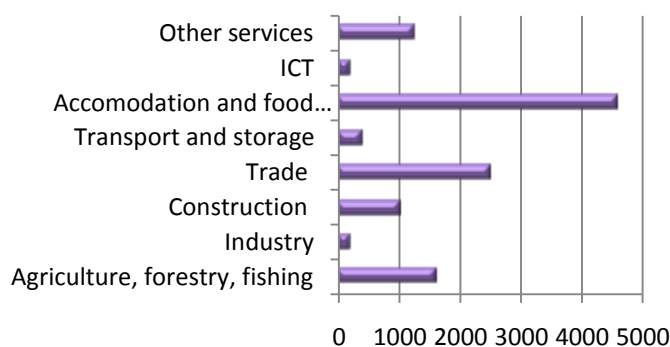
Figure 11: Active Enterprises by Size and Economic Activities in Fier

Active enterprises by size



■ 1-4 employees
■ 4-9 employees
■ 10-49 employees
■ 50+ employees

Active enterprises by economic activity



Source: INSTAT 2013

During the regional consultations one of the issues which were discussed and raised as a big problem reflected also in the contribution of the private sector to VET is the high informality of small business. Fier is an agricultural region however it is reported a lack of Agronomist in both Fier and Lushnja

The labour market has been changing very much in Albania and specifically in each of the regions. The businesses report a lack of quality assurance in education and training. Some of them report that their employees also have illiteracy problems (stated mainly by companies in the construction, textile and confection sectors).

One of the companies working in infrastructure reports that they train themselves the staff they hire. They claimed to have invested in training welders (for cast iron pipes), lathe operators, mechanics, and mechatronics because it is impossible to find in Albania qualified people in these occupations.

A representative of another company informed that they announced the positions for qualified welders, but no one showed up. That's why it is an evident risk to get at the end not qualified ones. Currently, the company trains the applicants, paying them while being trained, then test them and eventually hire the ones who performed well according to international standards.

Looking forward to TAP coming to Albania the stakeholders foresee the need for qualified trainers and certifiers in the welding occupation.

On the other side a private VET provider in the region, explains that the businesses are in general confused when it comes to hiring a qualified person or someone they trust. Usually they consider more important ethics at work (being punctual, good communications, honesty etc.), than the respective occupational skills and qualifications.

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Regional consultations

Table 7: Regional consultation results in Fier

Priority or potential economic sector	Needs for occupations in specific sectors	Needs for regulated occupations	Other relevant skills/issues	Existing VET supply/offer	
				VE Direction in Secondary Education	VT Course
Extracting industry	Specialists in different positions on the extraction of oil chain			Chemical technology	
Agriculture and forestry	Agronomy specialists Farmers Veterinary Wheat specialists Forestry technicians Topography technician Gardeners		* for green houses *currently all these occupations are covered by people above 50-55 years old	Agriculture	
				Veterinary	
Energy, automatization and electrical energy	Electricians for civil constructions Electricians for Water supply and sewage	Qualified electricians Water supply and sewage		Electro technics	Electro Installations Electro domestic Repair
				Electronics (x2)	
Construction and related occupations	Carpenter/jointer Builder Green construction				Wall maker Brick layer
Textile and confection	Textile engineer for shoe production Styling for shoe production Technician production Quality controller Maintenance of buildings				Tailoring

	Maintenance of machines Machine operators (for women mainly)				
Food processing	Veterinary for chicken production and processing Zootechnics for chicken production and processing Butcher for chicken production and processing				
Water supply and sewage	Plumbers for Water supply and sewage	Qualified plumbers Water supply and sewage		Installer of Thermohydrolic Systems (x2)	Solar Panels Plumber
Mechanical engineering	Welders Trainers for welders Certifiers for welders	Qualified welders according to international standards	Communication skills (Reporting and email writing)	Mechanics (x2)	Welder
Hospitality, restaurant and tourism	Tour guides		specifically for Apollonia archeological site		Cook
ICT and typography	IT specialists in different fields			Information and Communication Technology (ICT) (x2)	Computer
				Transportation Means Services (x3)	Autoservice
				Social health services	Baby-sitter
				Economy / Business	Secretary
					Hair-dresser
					English

5.5 Durres

Regional Context

Durres is ranked as second most economically developed region. Durres is one of the regions with significant weight in GDP, where is generated over 9.4 % of added value at the national level. Durres Region represents the core of Albania's geo-strategic position. In its territory are located the biggest Port of Albania, the airport "Mother Teresa" and the cross of all land, railway and maritime roads. The private sector constitutes the economic engine of the region with nearly 12 thousand enterprises in 2012, about 12.1% of Albania's total. Particularly, the construction sector had a boom during these years of transition. Durres Port is one of Balkans head-bridges that facilitate the transit of passengers and freight to and from the European continent, and to its neighbor land-locked countries Kosovo and Macedonia. It composes the major interface for Albanian international trade that delivers general, bulk, dry and liquid cargo ships. Currently serves 77% imports and 89% of Albania's exports.

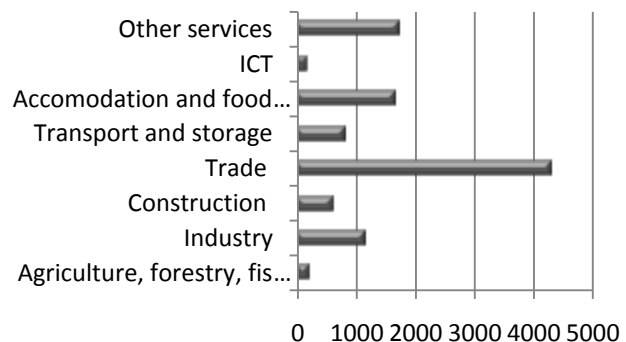
Often is said that Durres Region has been developed around three "T-s": Trade, Tourism and Transport. There is a shortage of skills in all occupational categories - managers, professionals, technicians, while the deficit is highest in the technician cadre. It could be described as the missing middle. The Albanian developing economy asks for 'key competencies/catalytic skills' to the workers on any level and in any occupation. The population has an average age of 28, creating a dynamic work force available even to new qualifications and skills.

Figure 12: Active Enterprises by Size and Economic Activities in Durres

Active enterprises by size



Active enterprises by economic activity



Source: INSTAT 2013

Several issues were raised from the consultations in Durres. A private provider, the German school of bakery products raised the issues of national recognition and integration of their three-monthly courses in the national system of qualifications. However, even though these courses are not part of the recognized courses, all of the trainees of these courses found jobs, either in an existing business or opened up their own.

The Regional Employment Office reports that unemployed jobseeker usually have the tendency to have a career line with segments in differ sectors, but not a progressive one. Thus it is very necessary to have a career system in some occupations, because the same occupation can be translated differently in different types of businesses or sectors.

One of the topics mentioned is offering post-secondary for some of the qualifications. This would be a solution for some occupations which are mostly needed, and also would fit the existing unemployed jobseekers with general secondary education. The Chamber of Commerce and Industry and the Regional Council of Durres reported of several regional attempts to find out of the needs for qualifications in the Durres region labour market. In 2013, in the frame of the IPA project 'Developing an Efficient Locally Managed Model of Vocational Education and Training', a feasibility study and a labour market survey was done for the Durres region. The labour market survey suggested the following:

- The companies employ mostly specialists for: textile or leather elaboration, mechanic, electrician, information & technology, food laboratory, hydraulic, building construction, hotel manager, cook, reception, hairdresser, waiter, etc.
- Communication and organizational skills are assessed by manufacturing companies as extremely important criteria for employment of managers, professional staff, and implementation specialists.
- Specialists employed in hotel & restaurant and also in food industry or wholesale food trade, should be equipped with standards for foods and consumer protection.
- The construction companies have a growing demand for implementation specialists for mechanical and electrical installation of elevators, central TV antennas, maintaining of control facilities at parking areas as well as electronic specialists for maintaining the camera system of parking areas.
- Based on short development plans of companies the most important unfilled job openings or job openings were for mechanic able to use the IT for defect diagnosis, food laboratory specialist media ITC specialist and mid level manager.

According to the Regional consultations, the main occupations/qualifications needed in the region of Durres were as follows:

Regional consultations

Table 8: Regional consultation results in Durres

Priority or potential economic sector	Needs for occupations in specific sectors	Needs for regulated occupations	Other relevant skills/issues	Existing VET supply/offer	
				VE Direction in Secondary Education	VT Course
Maritime	Skipper Fishing Hatchery technicians Fishing laboratory technician Maritime with navigation tools to service the port, coastal and internal waters Maritime offshore navigation vessels Quality management of marine products Maritime transport technology Marine engineering Electrical and electronic engineering Maritime service and maintenance	Skipper Maritime with navigation tools to service the port, coastal and internal waters Maritime offshore navigation vessels			
Food processing	Food technology Sommelier Baker Dairy production Pastry cook			Food technology	
Textile, clothing and leather industry	Tailoring/Sewing machine operators			Textile-Confection	Tailoring
					Sewing machines Repair
				Installer of Thermohydraulic	Solar Panels

				Systems	Plumber
ICT and typography	IT specialists in different fields			Information and Communication Technology (ICT)	Computer
				Economy / Business	Secretary
Hospitality, restaurants and tourism	Hotel managers Restaurant managers Cook Waiters and bartenders			Hospitality- Tourism	Cook
Mechanical engineering	Metal construction Mechanic Aluminum Fitter Welder Electro mechanics			Electro-mechanics	Welder
Transportation means engineers	Electro-auto Auto-mechanics Auto diagnosis		Mechanic able to use the IT for defect diagnosis	Auto-mechanics	Autoservice
Energy, automatization and Electrical engineering	Automatization Electrician Electronic appliances repairing				Electro Installations
					Electro domestic Repair
					Wall maker or Brick layer
					Duraluminium work
					Wood work

					Hair-dresser
					Baby-sitter
					Italian
					English

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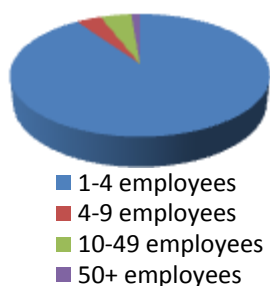
5.6 Shkodra

Regional Context

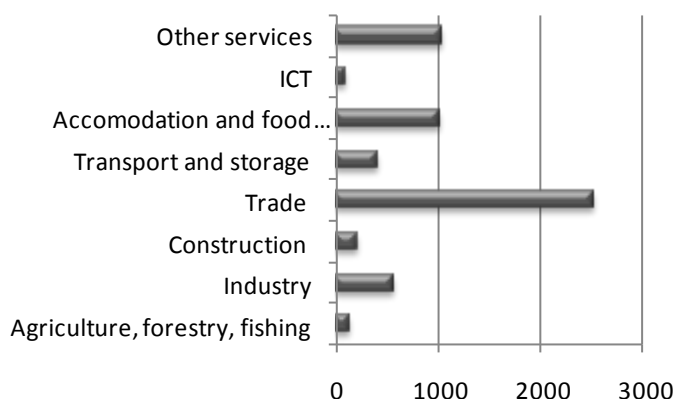
The GDP contribution of Shkodra Region in the national GDP was 6.1% in 2011 and is the highest compared to the other Northern regions such as Lezhe (3.7%), Kukës (2.4%), and Diber (3.1%). The unemployment rate is very high, 20.7% in 2012. Currently, the main economic activities in Shkodra district are concentrated in services, trade, wood processing, garment sector, construction and production of construction materials agribusiness etc. Tourism and agribusiness also remain two of the main economic sectors which combine potentials of natural resources, the advantages of its geographical position, the tradition of the region, but also growing interest of stakeholders and key partners in the region. Tourism in the Shkodra region is an age-old tradition. The products of the region have been much valued by both foreign and national tourists, but particularly by the local people. Although the produce has been mostly designed for national or local consumption much of it is attractive to foreign tourists as well. Problems that currently are facing the agribusiness sector are linked with the modernization of technology, standardization, competitiveness in regional and global markets, encouraging the promotion of regional brands, support services supply, management capacity and innovation as value added, etc.

Figure 13: Active Enterprises by Size and Economic Activities in Shkodra

Active enterprises by size



Active enterprises by economic activity



Source: INSTAT 2013

In the regional consultations in Shkodra region, there were participants from several sectors, facon (textile and shoe producers), tourism (hotels and restaurants), construction, food processing, handicraft association, agriculture and forestry, civil society organizations, etc. Due to the regional richness in natural resources and tradition in several types of businesses as well as an industrial production area in the past, Shkodra region (including Shkodra, Puka and Malesia e Madhe districts) priority sectors are quite diverse.

Tourism services including rural and mountain tourism such as resorts, hotels, guest houses, restaurants, which are mostly family businesses demand for qualified staff in all the occupational areas inside, such as: sanitary services, cook, waiter, bartenders, staff managers, storage managers, marketing specialist. Also, natural conservation issues were discussed within this sector. The local inhabitants do not have the environmental knowledge to protect their surroundings.

The Crafts and Handicraft sector seems to have been flourishing recently and seems to be a good source of income for many women. Some of the old crafts are in an attempt to be revived. However this sector is very informal and it suffers to a certain extent from lack of product branding and trading.

The facon, both textile and shoe-making, industry representatives declare that they need many operators for the sewing machines, but they do not need to be highly qualified, and basic education is enough for them. Mechanics and electro-mechanics for maintenance of machines are the occupations most urgently needed.

The recently emerging service is Telemarketing, which is an opportunity for many young people in the urban areas of Shkodra region. The companies present in the consultations reported to have trained approximately 3000 people in 6 years and currently they have a staff of 400, but they need about 100 more. It is however reported that also in this sector informality is a huge problem in a fair competitive market.

In the Shkodra region there are altogether seven VSSs and one VTC operating and in the table below you can see the matching between economic sectors needs and the VET supply.

Regional consultations

According to the Regional consultations, the main occupations/qualifications needed in the region of Shkodra were as follows:

Table 9: Regional consultation results in Shkodra

Priority or potential economic sector	Needs for occupations in specific sectors	Needs for regulated occupations	Other relevant skills/issues	Existing VET supply/offer	
				VE Direction in Secondary Education	VT Course
Hospitality, restaurant and tourism	Services in Rural/Mountain tourism Cooks in Rural/Mountain tourism Managers in restaurants and hotels			Tourism	Hotelier Waiter Cook
Agriculture and forestry	Skilled agricultural workers for organic products (vegetables and dairy) Agro-tourism Marketing specialist of agricultural products and livestock Environmental and nature protection in mountain/rural touristic areas			Agriculture (x2)	
				Agricultural Economy (x2)	
				Forestry	
Textile, clothing and leather industry	Tailoring/sewing machine operators Fashion designer Supervisors Quality controller			Textile-Confection	Tailoring Shoe sewing Packaging worker
Construction and	Construction technician			Construction	

related occupations	Bricklayers Tiles layer Builder Joiner (furniture) Carpenter				
				Wood processing	
Energy, automatization and electrical engineering	Electricians for civil constructions Electricians for elevators installation and repair Operators for hydro-power			Electro technics	Electrician
					Electro domestic Repair
Water supply and sewage systems	Plumbers			Installer of Thermohydrolic Systems Plumber Solar Panels Heating system	
Veterinary	Veterinary			Veterinary	
Food processing	Milk processing Meat processing Forest fruits processing Wine producing specialists			Agro food technology	
Extracting industry	Mining		*in Puka district		
Crafts and handicrafts	Marketing specialist for handicraft products				Carpets making
Other services					Telemarketing

				Information and Communication Technology (ICT)	Information and Communication Technology (ICT) Computer
				Transportation Means Services	
				Economy / Business	Entrepreneurship
					Secretary
					English Italian

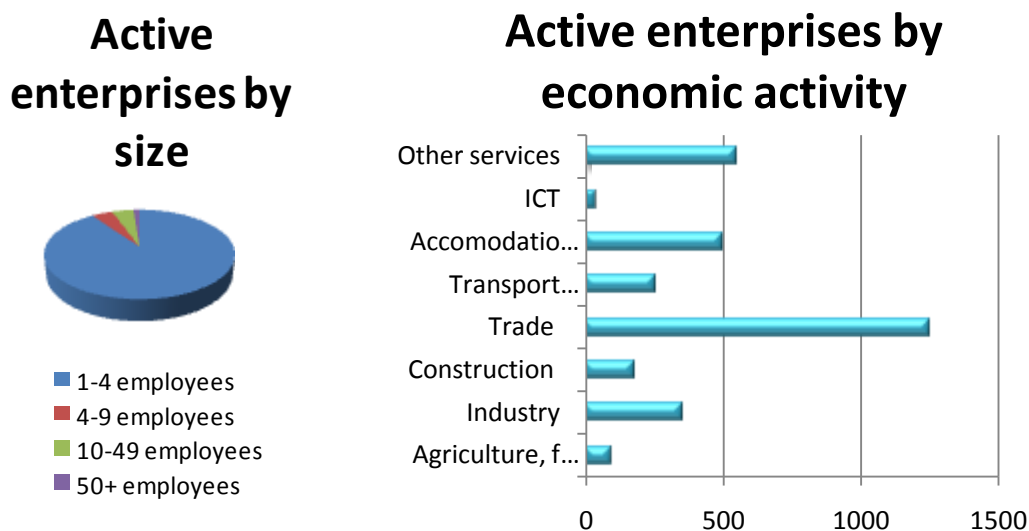
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5.7 Lezha

Regional Context

The three main contributors in the Lezha Region GDP are the following sectors: (i) Trade and hotels; (ii) Industry; and (iii) Tourism. In the rural areas, livestock production, and collection of medical herbs remains the main employment opportunities for almost all rural population

Figure 14: Active Enterprises by Size and Economic Activities in Lezha



Source: INSTAT 2013

In the Lezha region there are altogether two vocational schools.

The participants in the regional meeting agreed that there are many people currently living in this region, with work experience abroad, but they are not being used. Representatives of foreign companies stress the fact that it is necessary to have a qualified person to act as Personnel or human resources manager. Also on-the-job training was considered a very important mechanism for achieving a qualified work force.

Entrepreneurs, owners of restaurants and agricultural farms state that the majority of the workers are amateurs. Another business owner, operating in the construction and tourism sectors reports that usually they ask the potential employees: "Have you worked abroad?". Bakery (incl. bread) and pastry producers also complain that there are no qualified workers at all in their field, they either hire someone from abroad or train themselves newly hired employees.

Handicraft textile production is another area of interest in the region. It is usually the third age women who are engaged in this business (though it is informal); some attempts could be done to teach these skills to young women as well, as a sustainable way to generate income. The good practice is set from about 20 old women in the commune of Balldre.

Important topics discussed in this consultation meeting were: the lack of career orientation of young people, insufficient information of their parents, and expectations of the businesses in their work environment. Lack of motivation, lack of work ethics and proper dedication at work are issues which concern the businesses when hiring a new employee or having a trainee.

Regional consultations

Table 10: Regional consultation results in Lezha

Priority or potential economic sector	Needs for occupations in specific sectors	Needs for regulated occupations	Other relevant skills/issues	Existing VET supply/offer	
				VE Direction in Secondary Education	VT Course
Agriculture and forestry	Farmers Agro-tourism Skilled agricultural workers for plants, fruit trees and vines Agro-tourism				
Hospitality, restaurant and tourism	Hotelier Tourism hospitality Waiter and bartender		*foreign languages *communication skills *work ethics		
Food processing	Agro-food processing Manufacturing bakery Baker Patisserie maker Fish processing Food laboratory technician				
Energy, automatization and electrical engineering	Civil Electricians Electrician with IT knowledge (Automation technician)				
Mechanical engineering	Metal constructions (for the construction sector) Welder (for the construction sector)				
Maritime	Fishing Quality management of marine products Maritime transport technology Marine engineering	Maritime with navigation tools to service the port, coastal and internal waters Maritime offshore navigation			

	Electrical and electronic engineering in ship Maritime with navigation tools to service the port, coastal and internal waters	vessels			
Administration and business and financial services	HR /Staff Manager		*for factories or big companies in the facon or food processing sectors	Economy / Business	
				Economy Business / Office Administration	
Crafts and handicrafts	Handicraft products (textile)				
				Information and Communication Technology (ICT)	

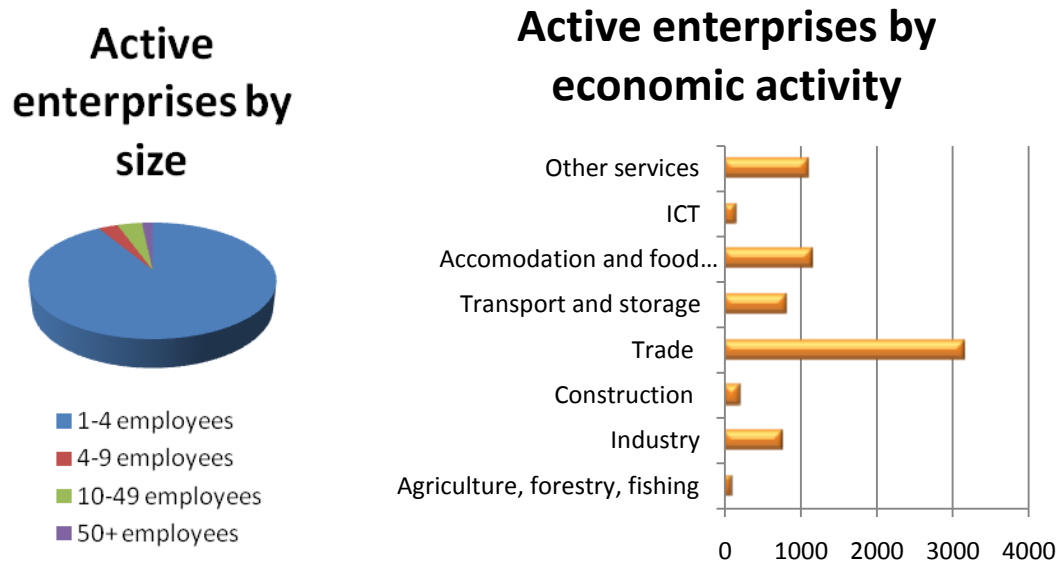
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5.8 Elbasan

Regional Context

Elbasan is one of the largest regions with the strong contribution to national economic development. The three main contributors in the Regional GDP are the following sectors: (i) Trade, hotels and restaurants; (ii) Agriculture; and (iii) Industry. In the rural areas, agriculture is the main sector of employment for almost all rural population.

Figure 15: Active Enterprises by Size and Economic Activities in Elbasan



Source: INSTAT 2013

In the Elbasan region there are altogether four vocational schools and one VTC offering a big variety of profiles. According to the consultation, the metallurgical industry is active in the region represented by Kurum, AlbChrome, etc. and is still demanding qualified workers especially in occupations like: panelist, electro-crane operator, welder, foundry workers, etc. Most of the time they request skilled workers from the VET school, but there is a low interest in the young people to work in this sector.

The chamber of commerce and industry in Elbasan emphasized the importance of agriculture sector in the development of the region. The constraints in this sector are linked mostly with the unqualified farmers, due to the fragmented market as well as lack of mechanization of working processes.

Services are the sector is demanding qualified sales person that needs to be equipped with communication and negotiation skills. In the hotels and tourism sector needs are quite the same with the other regions, but mainly hotel managers, receptionists and cooks are mostly demanded.

In the construction sector, just like in the other regions of Albania there is a need for all the mid level technicians, such as plumbers, elections, builders, etc. as shown in the table below.

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Regional consultations

Table 11: Regional consultation results in Elbasan

Priority or potential economic sector	Needs for occupations in specific sectors	Needs for regulated occupations	Other relevant skills/issues	Existing VET supply/offer	
				VE Direction in Secondary Education	VT Course
Agriculture and forestry	Skilled agriculture workers Agronomy middle technician Veterinary Breeder for different types of animals Technician for artificial insemination Rural water management Technician for using equipment for mechanization of work in agriculture Agricultural mechanics Gardening specialists		Opening/construction of water channels in agricultural land	Agriculture	
				Veterinary	
Water supply and sewage systems	Plumbers			Installer of Thermohydrolic Systems Hospitality-Tourism	Plumber
Mechanical engineering	Fitters for high power pillars Welders Mechanical fitter Metal processing Foundries Metallurgy	Highly qualified mechanical fitters and welders		Mechanics	Duralumin Welder
Construction and related occupations	Insulation and thermo-insulation technician Plasterer Tiles layer			Construction	Brick layer

Energy, automatizations and electrical engineering	Electricians			Electro technics	Electro Installations Electro domestic Repair Radio-TV repair
Hospitality, restaurant and tourism	Hotel managers Cooks Receptionists			Tourism	Cook
Transportation means engineering	Auto mechanics			Transportation Means Services (x3)	Autoservice Carpenter
				Information and Communication Technology (ICT)	Computer repair Computer
				Wood processing	Wood processing
				Economy / Business	Secretary
				Textile-Confection	Tailoring
					Social operator Baby-sitter Operator Barber Hair-dresser
					Italian English

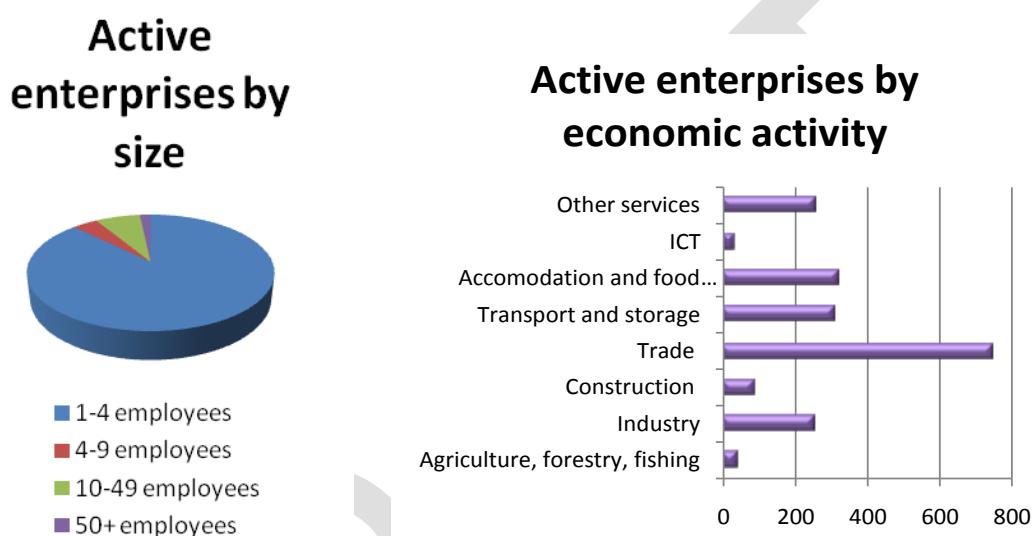
5.9 Berat

Regional Context

The economic situation in Berat measured by Gross Domestic Product per capita is lower, but near the national average, given as well the reduced population figures. Based on GVA Berat is a region-oriented towards agriculture, trade and tourism.

The structure of the economy in terms of number of enterprises indicates the dominance of the trade sector (39%), hotels and restaurants, clothing (both 14%), construction (11%) and food processing and other processing industries (both to 9%).

Figure 16: Active Enterprises by Size and Economic Activities in Berat



Source: INSTAT 2013

In the Berat region there are altogether four VSSs, including one in Kucova and one in Polican. According to the consultation in this region agricultural production consists of three main sub-sectors: (i) crops (cereals, vegetables, fodder and industrial plants such as tobacco and sunflower); (ii) Arboriculture (fruits, citrus and olives); (iii) livestock (cattle, sheep, goats, pigs, chickens and bees). The most important products are meat and dairy animal. Agro-industry represents an important part of economy including dough processing and bakery, milk, fruit and vegetable processing, olive oil production and winery. However, the bulk of production is used for consumption in the country with limited exports.

Berat is a region with strong tourism potential, especially for cultural tourism (since 2008, the city is recognized by UNESCO as a World Heritage site), and adventure tourism.

Regional consultations

Table 12: Regional consultation results in Berat

Priority or potential economic sector	Needs for occupations in specific sectors	Needs for regulated occupations	Other relevant skills/issue s	Existing VET supply	
				VE Direction in Secondary Education	VT Course
Agriculture and forestry	Farmer Viniculture farmer Arboriculture Livestock farmer Zoo technician Middle level Veterinarian		* for green houses	Agriculture	
Crafts	Restorer Stone mason Coppersmith Decorative woodwork			Installer of Thermo-hydraulic Systems	
Financial and administration services	Marketing specialist			Economy Business / Office Administration Economy / Business	
Textile, clothing and leather industry	Sewing machine operators Leather products Quality control Fashion designer				
Hospitality-Tourism	Hostels manager Receptionist Waiter and bartender Touristic guide Cook			Hospitality- Tourism	
Food processing industry	Enologist Sommelier Fruit processing technologist Food processing machine operator processing operator				

Energy, automatization and electrical engineering	Civil electricians Industrial electricians			Electronics (x3) Electro technics	
Mechanical engineering	Maintenance Metal construction			Mechanics (x3)	
Transportation means engineering	Auto mechanic			Transportation Means Services (x2)	
				Information and Communication Technology (ICT)	

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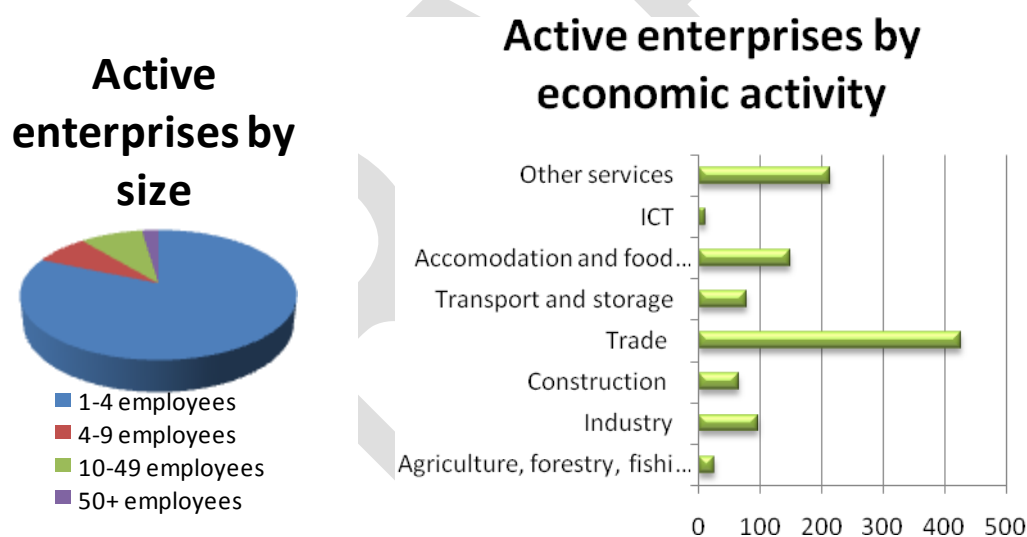
5.10 Kukes

Regional Context

In terms of economic performance, Kukes is traditionally considered one of the poorest regions in the country. During the last eight years, the economy shifted from agriculture to construction, industry, and services. Since 2002, the GVA share of agriculture and wholesale and retail trade dropped by 14% and 15% respectively, whereas industry, construction and other services increased by 63%, 44% and 15%.

The region is rich in metal ores (particularly chrome, and some nickel-silicate, iron, nickel, and copper) and in non-metal ores (quartz and marble). The latter is chiefly used for construction or ornamentation. Chrome is found in 96% of the 930 km², particularly in Tropoja (84%) and Kukes (12%). Other minerals are identified in smaller quantities: nickel-silicate, ferronickel and copper. The diverse relief and climate have affected the creation of micro zones, which are suitable for the development of ecosystems with plentiful biological varieties. Thus, there is an array of medicinal, ether-oil, and tenifer plants, which are a great asset to be recognized and exploited. The medicinal, ether-oil, and tenifer plants are an important source of revenues for many household economies in villages. Kukes Region has sufficient assets to attract tourists. These assets include, in particular, the extraordinary natural springs in the mountain peaks, alpine pasture lands, deep valleys, and spectacular lakes and rivers.

Figure 17: Active Enterprises by Size and Economic Activities in Kukes



Source: INSTAT 2013

Consultations in the region of Kukes showed that agriculture and forestry sector is really underdeveloped. Participants put a strong emphasis especially on the potential of livestock farming, forest fruits growing and processing, and recent mountain tourism. All these potential fields are demanding skilled professionals to better develop the Agro-tourism sector.

The dominance of the trade sector however shows that there is need to support also qualifications in services, such as retail and wholesale.

A big concern that came out in the discussions was the high mobility of youth from Kukes region to Tirana or Durrës, or even abroad. This phenomenon is influencing the high depopulation of the region, since many young people after getting an education or training decide to stay in the capital or abroad and eventually they get their families with them.

In the Kukes region only one vocational school operating within a joint school and a mobile VTC, which, as it will be noticed from the table below, do not fulfill the above mentioned needs of the labour market.

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Regional consultations

Table 13: Regional consultation results in Kukes

Priority or potential economic sector	Needs for occupations in specific sectors	Needs for regulated occupations	Other relevant skills/issues	Existing VET supply/offer	
				VE Direction in Secondary Education	VT Course
Extracting industry	Miners	Certified miners	*mainly in Tropoja district *technical safety regulations		
Energy, automatization and electrical engineering	Electrician hydro power Civil electrician			Combined Technical Education (electrotechnics, mechanics and wood processing)	
Hospitality, restaurants and tourisms	Rural and mountaintourism Waiters Cooks Family guest houses management Touristic guides		*Valbona area		
Transportation means engineering	Auto mechanic				
Food processing	Forest/wild fruits processing				
				Economy / Business	
				Information and Communication Technology (ICT)	

5.11 Diber

Regional Context

Dibra region results in the last position compared to the national average GDP. Agriculture, mining, and forestry are the most contributing sectors in Gross Value Added. From the statistics, the main sector of the regional economy is agriculture, which accounts for around 62% of total employment in the region. Planting fruit trees and nut were encouraged in particular due to the fact that Dibra has a very favorable climate for the cultivation of fruit. Although further support for agricultural production brings positive changes in rural areas, the conditions for job creation should be available in other production sectors. Other sectors have a potential like mining and tourism, but require careful use in order to avoid negative impacts between them and other branches of the economy.

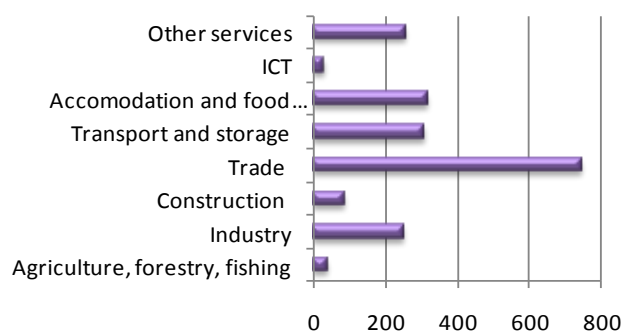
Figure 18: Active Enterprises by Size and Economic Activities in Diber

Active enterprises by size



- 1-4 employees
- 4-9 employees
- 10-49 employees
- 50+ employees

Active enterprises by economic activity



Source: INSTAT 2013

From the consultations other promising sectors remain services related to trade, especially sales persons (mainly ambulant) as well as food processing linked with: fruit processing, bakery and pastry, milk processing, etc. The private sector reports a lack of specialists in fruit and dairy processing and quality controllers. Medicinal and aromatic plants cultivation and processing is a potential field within the agriculture sector.

Additionally, lately facon textile companies are offering opportunities for employment of women. Their concerns however were mainly related with working conditions and legal constraints on interns or new workers in trial period. In Burrel, textile and footwear needed professionals in design, cutting, mechanics and machinery maintenance. The business representatives state that it is important for them to have the "full production cycle" specialists in order to add value to their production. A similar problem is present also in the mining companies, whose regulations do not allow for students' internships. It was strongly emphasized the need for technical safety rules trainings. Some businesses have found own solutions by organizing in-house training. Another problem is the aging of the current staff, mainly miners.

In the Diber region is only one VSS operating and a mobile VTC for the north east with no provision on the demands of the businesses. The actual VET provision (offers and graduates) does not fulfill all the expectations of the businesses.

Diber region is rich in hydro-resources, especially thermal waters. Thus, hospitality and tourism has been developing in the recent years. Qualified staff like cook, waiters and managers is needed, but no such qualifications are offered in the region.

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Regional consultations

Table 14: Regional consultation results in Diber

Priority or potential economic sector	Needs for occupations in specific sectors	Needs for regulated occupations	Other relevant skills/issue s	Existing VET supply/offer	
				VE Direction in Secondary Education	VT Course
Agriculture and forestry	Livestock care farmer Arboriculture Skilled agricultural worker for plants fruit trees and vines Medicinal plants qualified worker				
Food processing	Fruit processing technology Fruit processing skilled worker Milk processing skilled worker Butcher				
Extracting industry	Miners Markesheder Armator Mining explosive worker	Mining explosive worker	*in Bulqize district	Geology and mining	
Mechanical engineering	Mechanics Eletro-mechanics			Combined Technical Education – (electrotechnics, mechanics and wood processing)	
Transportation means engineering	Auto-mechanics				
Hospitality, restaurants and tourism	Cook Waiter Hotel and restaurant managers		*with knowledge on healthy nutrition * good communication skills *work readiness attitude		

				Economy / Business	
				Economy Business / Office Administration	
				Information and Communication Technology (ICT)	

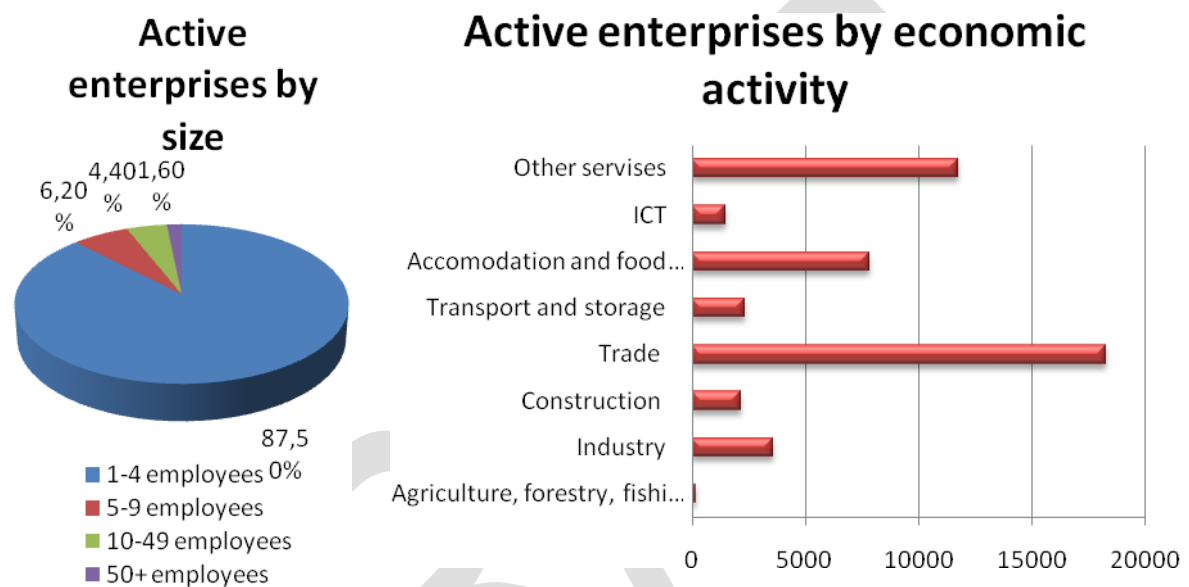
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5.12 Tirana

Regional Context

The region of Tirana is clearly the engine of the Albanian economy, generating over 36% of added value in national level. Compared with 2013, region of Tirana marks an increase of 4,182 new entering enterprises. At the regional level, GDP per capita in Tirana is about 35 % higher than the national ones (4439 Euros). The geographic concentration of businesses coincides with economic development data because over half of the total business of small and medium businesses (52 %) and large businesses (56 %) operate in the corridor Tirana - Durrës, with even greater concentration in Tirana. Tirana and Durrës have the largest number of employees in the manufacturing industry, services and construction.

Figure 19: Active Enterprises by Size and Economic Activities in Tirana



Source: INSTAT 2013

Even though, one third of the population is concentrated in Tirana, still the businesses are really suffering from lack of qualified people, not only in terms of vocational/technical skills but also, soft skills linked with communication and work readiness.

From the consultations wholesale and retail sales person are needed in the trade sector, which is still dominating the economic activities in terms of number of active enterprises. Other services which are demanding for qualified personnel include job positions like: call centre operators, client service operator and sales operator in call centres. These positions are currently giving an opportunity to students and unemployed young people (with university) to be integrated in the labour market.

Construction companies during the consultations stated that they need a whole range of skilled workers, from skilled carpenters, builders, plumbers, electrician, and metal constructions worker to semi-skilled workers.

One additional concern raised during the consultation was low percentage of employee's retention, which even though it was not clearly articulated it is not only related with skills shortages, but also with other factors which are linked with working conditions, salaries and other related issues.

Other sectors representatives as well stated skills shortages especially in mid-level qualified employees. Even though, in the Tirana region there are altogether seven VSSs and two VTCs operating and they offer a diverse range of directions and courses, (as it is seen in the table below) there is still much more to be done in order to get closer to the businesses' demands and needs.

Regional consultations

Table 15: Regional consultation results in Tirana

Priority or potential economic sector	Needs for occupations in specific sectors	Needs for regulated occupations ⁶	Other relevant skills/issues	Existing VET supply/offer		
				VE Direction in Secondary Education	VT Courses (VTC4)	VT Courses (VTC1)
Construction and related occupations	Bricklayer Plasterer Tiles layer Geodesist Topographer Joiner Construction technician Insulation and thermo-insulation Builder Plaster (gibs) works Painting and decoration Interior Carpenter Road construction repairing		Willingness to learn Work readiness Punctuality Communication and negotiation skills Entrepreneurship skills Flexibility Team work	Construction		
				Geodesy		
				Wood processing	Wood work	
Water supply and sewage	Plumber (Operator) – for water supply Solar panel specialist Plumber (Operator) sewage systems Plumber - Heating and cooling systems			Installer of Thermo-hydraulic Systems (x2)	Plumber	Plumber Solar Panels

⁶The issue of the regulated professions was not discussed very much in this meeting, due to the long list of economic sectors to be discussed.

Energy, automatization and electrical engineering	Industrial Electrician Civil Electrician Automation technician Mechatronics Electronic Specialist Electrical energy production Panel operator Elevator Installer and Repair Repairman of electronic equipment Solar Photovoltaic Installer			Electrotechnics	Electro Installations Electro domestic Repair	Air-conditioner Electro Installation s
				Electronics		Electronic repairing
Mechanical engineering	Machinery and metal works Metal Constructions Foundries Instruments builder Machinist Metal Processing Welder Technology spilling of details Aluminum works Mechanical fitter			Mechanics	Welder	Welder
Transportation means engineering	Airport Services Logistic Vehicles sales Mechanics of heavy machines Engine specialist Auto Mechanic Operator of heavy machines in construction Crane operator Trailer Services Mechanics of electrical and electronic systems in			Transportation Means Services	Painting and Autoservice	Autoservice Elektroauto Car repair of metal

	vehicles Automotive metallic repairing and paint					
Administration and business and financial services	Sales Manager/Specialist Business Administrator Cashier/Treasurer Kostoist International Business Marketing specialist Building administrator Communication and PR Management archives and registers Office Assistant Tax and Insurance Specialist Sales managers	Building administrator	* building administrator is in the process to become a regulated occupation from the Ministry of Urban Development *Entrepreneurship	Economy / Business (x2)	Office cashier Entrepreneu rship	Secretary
				Economy Business / Office Administration	Secretary	
Hospitality- restaurant tourism	Catering Services Services in restaurant and hotel Cook Receptionist Waiter Bartenders Food Manager Chefs dietician Managers in restaurant Managers in hotels Cleaning services Rural Tourism Tourist guides Travel Services			Hospitality- Tourism	Bar-tender Cook Receptionist Family tourism	
Food processing	Dough production Baker Pastry cook Meat processing operator Meat processing skilled workers Milk processing operator			Food technology		

	<ul style="list-style-type: none"> Processing of Fruits and Vegetables Food laboratory technician Chemical engineer for food processing Responsible for production in food industry Quality controller Foods and beverages tasting Sommelier 					
ICT and typography	<ul style="list-style-type: none"> Networks and database technician Technical support to users Software developer Software analyst Computer mechanic IT systems administrator Broadcasting technicians Telecommunications technician Typography Digital Publishing Bookbinding's operator Graphic Designer 			Information and Communication Technology (ICT)(x2)		Graphic Designer
Textile , clothing and leather industry	<ul style="list-style-type: none"> Fashion Design Tailor Confections Leather products Cutter Textile, fur and leather products machine operators Modeler Quality controller Production Technician Production Supervisor 			Textile-Confection	Tailoring	Tailoring

Health, social and personal services	Elderly Care assistant Childcare Care assistants for children with special needs Care assistants for persons with disabilities Gym Instructor Social Worker Physiotherapist Dental laboratory technician Aesthetic Services Hairdressing services				Esthetic Cosmetics Hair-dresser	Hair-dresser Barber
					Baby-sitter Social Operator	Baby-sitter Social Operator
Agriculture and forestry	Vegetable and animal production Horticulture (gardening) Domestic animal care Agro-tourisms			Agriculture	Gardener	Beekeeper
					Basis of Italian English	

5.13 Kamza* ⁷

Context

Kamza is characterized by high informality, thus it is necessary to study more in depth the labour market in Kamza. From the interviews and consultation it is reported that the majority of businesses are mostly focused in services, including restaurants, trade and limited production of goods.

One of the representatives of the business specified that it is important first ethics at works, punctuality and dedication. The people (mainly young) that the businesses hire are usually without any skill, or as they say 'taken from the street', and they are then trained on the job to perform the specific occupation, from the car service shops to restaurant occupations (waiter, bartender, cook, pizza chef, cleaning person).

The businesses agree that it is needed to assure the quality of education and training, and that for the practice in the business it is necessary to have contracts. However more work should be done in motivating students to learn and to successfully exercise an occupation.

With regard to the motivation of students to enter VET or to take up a certain occupation, many businesses agree that before enrolling in a specific school or University, students should be asked if they really want to make such a choice, because then this is reflected in their motivation during practice in the real work environment, in the business. The quality of services and products is linked directly with qualified staff, thus it is necessary to hire people with relevant skills and diplomas.

⁷Kamza consultations was conducted separately due to the special focus of the GIZ VET programme in this area and in its VE school/MFC Kamza.

Consultations

Table 16: Regional consultation results in Kamza

Priority or potential economic sector	Needs for occupations in specific sectors	Needs for regulated occupations	Other relevant skills/issues	Existing VET supply/offer	
				VE Direction in Secondary Education	VT Course
Hospitality, restaurant and tourism	Waiter Bartender Managers (hotel/restaurant) Cook		Work ethics and communication	Hospitality- Tourism	
Transportation means engineering	Electro-auto Auto mechanics		*with ITC skills	Transportation Means Services	
Mechanical engineering	Metal Constructions Fitter Foundry Welder Electro mechanics				
Health, social and personal services	Elderly care Psycho-social care Assistant doctor or medical assistant	Care professionals	*could be offered in the post-secondary	Health care services	
Water supply and sewage	Sewage systems plumbers Heating and cooling systems installing, repairing	Qualified specialist			
Energy, automatization and electrical engineering	Civil electrician				
ICT and typography	Network and database technician IT user support Computer mechanics Website developer			Information and Communication Technology (ICT)	
				Agriculture	

				Agricultural Economy	
				Economy / Business	
				Economy Business / Office Administration	
				Food technology	

VI. LIST OF CCUPATIONS/QUALIFICATIONS

The following list of the most demanded 182 occupations in 18 sectors is the result of the desk research and consultations with the relevant stakeholders. In order to turn this into a workable, prioritised list of qualifications, which should be developed and offered by the Albanian education and training system, there was an issue of prioritising and sorting them. The prioritisation and sorting was mainly based on the opinions, priorities and expectations of the stakeholders. This list is to be considered neither as complete, nor final. It will be used for further work, starting with an inventory and analysis of vocational qualifications where more in-depth analysis will be done at available qualifications and their quality.

Table 17: The list of occupational fields/sectors and the respective occupations/qualifications

Nr	Occupation	Sector
1	Farmer	Agriculture and forestry
2	Agricultural worker qualified for vegetables	
3	Breeder for different types of farm animals (bovine milk, bovine meat, the flock (sheep, goats), pigs, poultry, rabbits, bees.	
4	Beekeeper	
5	Livestock and dairy producer	
6	Skilled agricultural worker for plants fruit trees and vines	
7	Agricultural worker qualified for cereals and forage	
8	Medicinal plants qualified worker	
9	Agricultural worker qualified for gardens in general	
10	Agriculture and livestock farm manager	
11	Technician for using equipment for mechanization of work in agriculture and livestock.	
12	Topography technician	
13	Artificial insemination technician	
14	Skilled agricultural worker to protect crops	
15	Skilled agricultural worker for organic products	
16	Rural Water Management Specialist	
17	Forestry technician	
18	Agro-tourism product developer	
19	Forest ranger	
20	Forestry machinery operator	
21	Environmental and nature protection specialist	
22	Assistant veterinarian	
23	Heels treatment specialist	
24	Zootechnic	
25	Marketing specialist of agricultural products and livestock	
26	ICT specialist in agriculture	
27	Cook and Chef	Hospitality- restaurant tourism
28	Receptionist	

29	Waiter		
30	Bartender		
31	Cleaning services employee		
32	Event Specialist (Banquet, catering services, hotels...)		
33	Manager in restaurant		
34	Manager in hotels		
35	Travel Services Agent		
36	Food Service Manager		
37	Cook Dietician		
38	Tourism product developer		
39	Tourist guides		
40	Dough processing skilled worker		Food processing
41	Meat processing operator		
42	Food and related products machine operator		
43	Production Supervisor in food industry		
44	Quality controller		
45	Baker		
46	Pastry cook		
47	Chemical engineer for food processing		
48	Milk processing operator		
49	Processing of Fruits and Vegetables skilled worker		
50	Butcher		
51	Fish Processing operator		
52	Food and beverage taster and grader		
53	Meat processing technologist		
54	Food laboratory technician		
55	Aesthetic specialist	Health, social and personal services	
56	Hairdresser		
57	Gym Instructor		
58	Childcare assisstant		
59	Care Assistant for children with special needs		
60	Elderly Care assistant		
61	Social Worker		
62	Physiotherapy		
63	Dental laboratory technician	Maritime	
64	Care assistant for persons with disabilities		
65	Inland and coastal waters fishery worker		
66	Deep-sea fishery worker		
67	Aquaculture worker		
68	Farm manager		
69	Hatchery technician		
70	Able seafarer/tug rating (deck)		
71	Ships' deck officer		
72	Ships' deck pilot		
73	Electrical and electronic technician		

74	Maritime mechanical maintenance worker	
75	Skipper	
76	Cutter	Textile, clothing and leather industry
77	Textile, fur and leather products machine operator	
78	Tailor	
79	Production Supervisor	
80	Quality controller	
81	Production Technician	
82	Fashion Designer	
83	Modeler	
84	Mining and mineral processing plant operator	Extracting industry
85	Miner	
86	Mining technician	
87	Mine supervisor (inc. Safety rules)	
88	Mining explosives worker	
89	Armature worker	
90	Mechanic for power plants	Mechanical engineering
91	Aluminum worker	
92	Welder and flamecutter	
93	Agromechanic	
94	Construction Sheet-metal worker	
95	Sheet-metal worker	
96	Motor vehicle engine and fuel systems service technician	Transportation means engineering
97	Mechanic of heavy machines	
98	Auto Mechanic	
99	Trailer Services technician	
100	Motor vehicle mechatronics service technician	
101	Automotive diagnosis technician	
102	Operator of heavy machines in construction	
103	Crane operator	Energy, automatization and electrical engineering
104	Industrial Electrician	
105	Civil Electrician	
106	Electronic Specialist	
107	Electrical energy production Specialist	
108	Repairman of electro domestic appliances	
109	Power production plant operator	
110	Telecommunications technician	
111	Antena installer and maintenance worker	
112	Automation technician	
113	Mechatronic	
114	Solar Photovoltaic Installer	
115	Elevator Installer and Repairer	
116	Videoentry system Installer and repairer	
117	Electromechanic	
118	Repairman of electronic equipment	
119	Bio-energy engineering technician	

120	Plumber (Operator) – for water supply	Water supply and sewage
121	Plumber for solar panel	
122	Plumber (Operator) sewage systems	
123	Plumber - Heating and cooling systems	Construction and related occupations
124	Bricklayer	
125	Plasterer	
126	Tiles layer	
127	Geodesist	
128	Topographer	
129	Construction technician	
130	Insulation and thermo-insulation worker	
131	Door and windows producers (Aluminium and plastic)	
132	Gibs worker	
133	Painter (decoration)	
134	Carpenter	
135	Road construction and repairing technician	
136	Restorer	
137	Interior designer	
138	Building caretaker/supervisor	
139	Cabinet maker/Joiner	
140	Upholsterer or decorator	Administration, business and financial services
141	Fabricated wood materials worker	
142	Cashier	
143	Accountant	
144	Shop salesperson	
145	Costoist	
146	Business Administrator/Manager	
147	Marketing specialist	
148	Office Assistant	
149	Tax Specialist	
150	Insurance Specialist	
151	Sales agent and manager	
152	Storage keeper	
153	Building caretakers/supervisors	
154	Public relations professional	
155	Logistic Manager	ICT and typography
156	Real estate agents and property manager	
157	Networks and database Technician	
158	Web technician	
159	Computer mechanic	
160	ICT user support technician	
161	Software developer	
162	Print finishing and binding worker	
163	Digital publishing specialist	
164	Broadcasting technician	

165	Graphic Designer	
166	Ceramics craftsman	Handicrafts
167	Stonemason	
168	Jeweler	
169	Musical instruments artisan producer	
170	Embroidery artizan	
171	Coppersmith	
172	Loom weaving artisan	
173	Wooden handicraft artisan	
174	Construction materials technologist	Chemical technology
175	Petroleum and natural gas refining plant operator	
176	Petroleum technologist	
177	Fitters in petroleum processing	
178	Industrial laboratory technician	
179	Chemical products plant and machine operator (paper, plastic...)	
180	Call center operator	Other services
181	Protective services worker	
182	Client service operator	

Almost all of the stakeholders mentioned that employees of every level and occupation should possess the transversal key competencies, such as problem-solving and analytical skills, self-management and communication skills, linguistic skills, and more generally, "non-routine skills". The following skills were amongst those listed as essential for employment: positive attitude, reliability, and initiative, ability to work as part of a team, communication, ethics, punctuality, responsibility and flexibility.

VII. CONCLUSION AND OUTLOOK FOR FURTHER ACTION

Changing patterns of labour demand have been driven by the changing industrial structure of the Albanian economy, in particular the growth in importance of commercial services (such as business services and retail) and the decline in the share of workers employed in manufacturing and primary industries. At the same time, required skills levels have been increasing within each industry due to the modernisation of production techniques.

Many employers report difficulties in finding the required skilled labour. Although these are often explained by other factors, such as the geographical mismatch between skills demand and supply and poor working conditions or pay, skill deficits among job applicants remains the key factor. A VET system, which is not sufficiently geared to the labour market, fails to provide the Albanian economy with skills and competences required by companies and the society as a whole. Although skills deficiencies have been observed in all categories of occupations, such as managers, specialists with higher education, technicians and skilled workers or crafts people, the deficits remain higher in technical areas especially in sectors, such as tourism, manufacturing, modern agriculture, etc.

In addition to specific technical skills, employees of every level and occupation should possess key competencies or catalytic abilities, such as the ability to solve problems in complex and constantly changing work environments, computer skills, communication and analytical skills, ability to work together, work ethic, as well as those related to innovation, entrepreneurship and business development, etc.

This demand-side analysis has been part of a series of elements that together aim to bring VET supply in Albania closer to labour market demands. Another important element has been the 2014 GIZ-ETF Baseline Survey of Public VET providers. This analysis of available skills needs studies and consultation sessions has been useful not only from the point of view of producing valuable information, but also because we have involved and shared knowledge with a large group of stakeholders.

Although successive Albanian governments have constantly stressed the importance of better matching VET provision with labour market demands, systemic achievements in this respect have been rather insignificant. In the light of the challenges that Albania is facing, one major priority now is to develop a **National VET Provider Development Plan** with a view to re-orient VET provision in the regions towards labour market demand. The Plan should identify those VET providers – public or private or a combination - who could best offer the skills or occupations identified.

Another priority is the AQF. It can have an added value for Albanians if the qualifications referenced to the AQF levels and included in the national database are in line with labour market needs and of good quality. End users should be able to trust that the qualifications inside the AQF are relevant for them. If used as a vehicle for reform of the qualification system, the AQF can lead to better qualifications that are more relevant to the labour market and flexible enough for qualification holders to progress to higher levels of qualifications or combine different ones.

In the present paper we compiled a draft list of 182 occupations in 18 sectors. In order to turn this into a workable, **prioritised list of qualifications**, which should be developed and offered by the Albanian education and training system, there was an issue of prioritising and sorting them. This list is to be considered neither as complete, nor final. It will be used for further work, starting with an **inventory and analysis of vocational qualifications** where a more in-depth analysis of available qualifications and their quality will be undertaken.

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APPENDIX

List of Companies/Stakeholders interviewed during the consultation process

	Name Surname	Institution /Company
1.	Silvana Nini	Pedagogue/fashion designer
2.	Anila Zajmi	Atelie AZ
3.	Adriana Cibaj	Karl Gega School Tirana
4.	Lejla Hakiraj (Sengla)	Karl Gega School Tirana
5.	Spiro Priftanji	Enerepreneur tailoring, Tirana
6.	Aldo Shehu	Albetelekom SP WIFI Project cisco-systems
7.	Lefter Nano	Instructor VT Nr 4 Tirana
8.	Jonida Haxhi	"Gjergj Canco" School, Tirana
9.	Griselda Lushi (Daja)	"Gjergj Canco" School, Tirana
10.	Ditjon Xhaja	Altima sh.p.k.
11.	Mirela Andoni,	Institute for Educational Development
12.	Polikseni Ikonomidhi	Terini Travel Agency, Sarandë
13.	Vasil Barka	Pedagogue, University
14.	Alda Karameta	Mondial Hotel (manager)
15.	Gerta Kacanja	Sheraton Hotel
16.	Donald Vogli	Hospitality Tourism School
17.	Eriona Metushaj	Chief of Reception, Hotel Sheraton
18.	Bujar Skënderaj	Agronomist/selfemployed
19.	Veronika Baboçi (ÇAÇI)	Rakip Kryeziu School Fier
20.	Sonila Najdeni	Ministry of Agriculture, Rural Development and Water Administartion
21.	Hamza Hyka	Ministry of Agriculture, Rural Development and Water Administartion
22.	Merita Petushi	Ministry of Agriculture, Rural Development and Water Administartion
23.	Albert Koço	First officer, marine
24.	Gazmend Sina	Director, Consulting Company for maritime transport "Albartin Shipping Co" Ltd, Durres
25.	Mehmet Qerim Metaj	Navigator/Captain Durrës
26.	Gëzim Veli Koroveshi	Fishing Captain Durrës
27.	Vasiljevski Stamo	Fishing specialist Durrës
28.	Llambi Huta	Shef i Sektorit Teknik në pension
29.	Jerina Kolutari	Coordinator of Aquaculture and fishing, (Durres UBT)
30.	Ilir Ahmet Ulqinaku	Captain fishing boat Durrës

31.	Merita Uruçi	ADAMA Association (foodprocessing)
32.	Maime Borova	ADAMA Association (foodprocessing)
33.	Edlira Dallo	Hospitality-Tourism School Tirana
34.	Flutura Vucini	Laboratory supervisor, Authority for food Controller, Tirana
35.	Bledar Stafa	Audit Association "Price Waterhouse Coopers Audit sh.p.k."
36.	Anxhela Kasapi	Financial services department /Ministry of Finance
37.	Ira Rroco	Economic Technician School
38.	Silva Kotja	Economic Technician School
39.	Ervin Toraj	Deep processing Oil Company, Ballsh
40.	Gëzim Aliaj	Deep processing Oil Company, Ballsh
41.	Ylli Xhafaj	Deep processing Oil Company, Ballsh
42.	Ismet Beqiraj	Petagogue /Fakultety of science
43.	Krenar Hasanaj	"Gjergj Kastrioti Skenderbeu" Vinery and Alkoholade Durres
44.	Angelo Golgota	MULTIVAC Albania shpk Tirana
45.	Edilson Hodaj	Power plant company, Ballsh
46.	Agron Veliaj,	Electricity distribution operator in Albania
47.	Gleand Ballgjini	Electricity distribution operator in Albania
48.	Ermand Abazi	Electrician Selfemployed Tirana
49.	Arben Galushi	Albanian Power Corporation (KESH sh.a)
50.	Violeta Sinoimeri	Albanian Power Corporation (KESH sh.a)
51.		Albanian Power Corporation (KESH sh.a)
52.		Association of Water Supply Companies
53.	Edmond Shaba	Electrician Selfemployed Tirana
54.		SALUS hospital Tirana
55.		Hygeia Tirana
56.		German hospital Tirana
57.	Anila Dhoksani	Head Nurse, Military hospital, Tirana
58.	Alfrida Brako	Nurse Military hospital, Tirana
59.	Laura Caushi	Head Nurse, Military hospital, Tirana
60.	Mynever Baholli	Directory of Road Transport Services, Tirana
61.	Gjergj Xhafa	General Director of AVIS, Albania
62.	Arben Tauzi	Mechanical engineers, Selfemployed, Tirana
63.	Mirela Kacnija	Footwear company, "MEGI-Y" Tirana
64.	Gentiana Brari	Footwear company, "MEGI-Y" Tirana

65.	Merita Cumraku	Footwear company, "MEGI-Y" Tirana
66.	Hekur Muka	Gardener, Selfemployed
67.	Mariglen Sadiku	Footwear company MITO Berat
68.	Zamira Vito	Footwear company MITO Berat
69.	Kriton Prendi	Footwear company MITO Berat
70.	Avenir Kika	Construction association
71.	Alfred Cermurati	Heating and cooling system technician/Selfemployed
72.	Artan Vozga	Heating and cooling system technician/Selfemployed
73.	Julinda Gjonja	Employment office Tirana
74.	Marsela Bushi,	Employment office Tirana
75.	Brunilda Çabeli	Employment office Fier
76.		BKT, Tirana
77.		ProCredit Bank Tirana
78.		Union Bank
79.	Agetina Kaçorri	INSIG Tirana
80.	Odise Jorgji	INSIG Tirana
81.	Vitori Shehu	SIGAL Tirana
82.	Enkela Guzi	Real estate, Century 21 Albania
83.	Erigest Isufaj	Real estate, Century 21 Albania
84.	Erald Zeneli	Real estate, Century 21 Albania
85.	Merita Coku Rexha	Head midwife/Maternity hospital Tirana
86.	Lindita Kola	Head midwife/Maternity hospital Tirana
87.	Klementina Deda	Omega Sh.p.k Textile-clothing, Tirana
88.	Enerjeta Abazi	Omega Sh.p.k Textile-clothing, Tirana
89.	Mirela Beca	Omega Sh.p.k Textile-clothing, Tirana
90.	Ledion Danaj	Abtelecom/ Verso Albania, Sh.p.k.
91.	Erida Çibuku,	Beauty Esthetician Salon Tirana
92.	Nexhbedin Marku	Engineer, AlbChrome, Bulqiza
93.	Emin Shina	HR, AlbChrome, Tirana
94.	Ferdinand Mema	Ferrocrome Company, Elbasan
95.	Frederik Dedja	Ferrocrome Company, Elbasan
96.	Silvana Xhaferri	British Chamber of Commerce in Tirana
97.	Andrea Xhavarra	Chamber of Industry and Commerce Durres
98.	Frank Handke	FES

99.	Bledar Dollaku	KFW
100	Monika Vejseli	GIZ
101	Silvana Banushi	MoSWY
102	Diana Xhelili	NAVETQ
103	Kozeta Rokomanaj	MoES