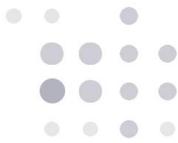


2015

Annual Review of Labour Relations and Social Dialogue Albania

NIKOLL DOCI
March 2016

- The main priorities of the government's program during 2015 were to boost economic development, make reforms in the economic and social field, and pursue EU integration.
- Since June 2014, Albania has had candidate status for the EU and in the last stage of the opening of negotiations the government should act decisively in implementing all the recommendations made in the European Commission's report, mainly regarding reform in public administration, the judiciary system, and the fight against organized crime and corruption, as well as in protecting human rights and enforcing anti-discriminatory policies.
- The economic indicators increased during 2015 and the general level of economic growth was higher compared to the previous two years. Albania continues to be affected by the global economic crisis in many ways with high poverty, a significant reduction in remittances, a high unemployment rate, and bad loans that are as high as 22.5 per cent, damaging the business climate and restraining banks in terms of extending credit.
- In the field of social dialogue, the activity of the National Labour Council (NLC) has continued. There has been some improvement in labour relations legislation, the Labour Code, which was approved by parliament, mainly in establishing structures of tripartite social dialogue at the local level. Bipartite social dialogue remains weak, especially in the private sector.
- Trade unions have enhanced their activity for employees' protection and collective agreements but have not managed to overcome the rift between them. The number of protests organized by trade unions has been higher compared to 2014. Trade union membership in the private sector remains low.



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1. SOCIO-ECONOMIC DEVELOPMENTS

After decreasing between 2011 and 2013, Albania's Gross Domestic Product (GDP) has grown again for the past two years, 1.9 per cent in 2014 and 2.5 per cent in 2015.

Foreign Direct Investment (FDI) has been decreasing during the last three years: in 2013, FDI amounted to € 923 million and most of this amount has been reinvestment of capital benefits from the operation of foreign companies. In 2014 and 2015 the total of foreign investments in Albania declined. According to Confindustria¹ (an employers' organization) this is due to increased taxes and the application of a progressive tax. Confindustria has requested the Government to increase its income based on the strategy of good fiscal management rather than by increasing taxes for businesses and citizens.

The trade balance² has improved. During the five-year period (2010-2014) export of goods increased while import of goods has been fluctuating (up and down). The annual average increase of exports was 20.8 per cent while imports decreased during 2012-2013 and increased in other years. In 2010-2014 the average annual increase in imports was about 5.4 per cent. The trade deficit has improved, decreasing by about 1.3 per cent. The main trading partners of Albania continue to be Italy and Greece.

The budget for 2016 is projected at the level of € 418 billion in income to € 454 billion in expenses, creating together a deficit of around -34 billion. In planning the budget for 2016 the government has forecasted a reduction of public debt to 70.9 per cent and maintaining the deficit, a reduction of budget expenditures in the amount of 1 per cent less than in 2015. Through this budget for 2016 it is intended to reduce public debt. The government decreased funding for education and infrastructure in the amount of 10-32 per cent, increased funding for agriculture, the environment, the Ministry of Economy, Justice, Integration, Culture, to the extent of 19-50 per cent. The budget for the Ministry of Health is on the same level as in 2014.

The high level of public debt remains the main risk for economic growth. The country's public debt has grown at high rates over the past five

years, becoming a major threat to macroeconomic indicators and economic development in the future. Public debt has grown from 59 per cent of GDP in 2011 to 72.0 and 72.8 per cent in 2014 and 2015 respectively.

During the last years the inflation rate was calculated by the Bank of Albania and it was in the range of 2-4 per cent. For 2015, inflation has been low, at the rate of 2 per cent.

The average monthly wage of an employee increased from one year to the next. For 2015, the average monthly wage in the state sector was € 378, while in the private sector it was € 325. The average wage is higher in the state sector than the private sector. The minimum wage in 2011 was 20,000 Lek (144 €) and was increased every year by the amount of 1,000 Lek (7 €) reaching 22,000 Lek in 2013 (158 €). Although the minimum wage in Albania is very low compared to the other countries in the region, there was no increase in the minimum wage in 2014 and 2015.

There have been changes in employment patterns in the private sector: Employment in the non-agricultural private sector increased (318,571 in 2014 to 325,665 in 2015), while the number of employees in the agriculture sector decreased in 2014 and increased in 2015. The number of employees in the public sector is almost unchanged. The number of registered jobseekers in the employment offices³ in 2015 was 145,478. The unemployment rate, according to INSTAT⁴ sources increased from 13.8 per cent in 2012 to 17.5 per cent in 2014, while in 2015 it was at the level of 17.4 per cent. Young people are largely unemployed, the number of young unemployed increased from year to year (in 2015, unemployed youth accounted for 34.2 per cent of the unemployed).

Poverty in Albania⁵ increased from 12.4 per cent in 2008 to 14.3 per cent in 2012. This is the official figure for poverty but the real figure is higher. Extreme poverty, defined in Albania as persons that have difficulties in meeting basic food needs, increased from 1.2 per cent in 2008 to 2.2 per cent in 2012. The extreme poverty increased in urban areas to 2.2 per cent and in rural areas to 2.3 per cent. In 2015 the number of poor families in the economic assistance scheme in Albania was around 80,000 families or a total of 312,000 persons

¹ web: www.Konfindustria.al Confindustria - Confederation of Albania Industries

² INSTAT, Foreign Trade, 2010- 2014

³ INSTAT, Registered job seekers, 2012 - 2015

⁴ INSTAT, Statistical Yearbook 2015

⁵ INSTAT, Albania: Poverty trend 2002-2005-2008-2012



(3.9 is the average number per family). The amount of economic assistance for a 4-member family is calculated as 5,220 Lek, or 1,305 Lek per month/person, less than 10 € per month/person. Albania has not yet determined the official subsistence minimum. This situation shows the great poverty prevailing in Albania and an almost non-existent welfare system.

According to an INSTAT survey on living standards, Albania's coefficient of the Gini index is at 34.5 per cent.

2. STATE POLICIES

Parliament consists of 140 members elected every four years by a proportional system with electoral zones. Since the last elections in 2013 the government has been formed by the left coalition "Alliance for European Albania" with 83 MPs as members of the political parties that constitute this coalition: the Socialist Party 65 MPs, Socialist Movement for Integration 16 MPs, Party Union for Human Rights 1 MP, and Albanian Christian Democratic Party 1 MP. The right coalition headed by Democratic Party is in opposition with 57 MPs.

The main reforms undertaken by the Government during 2015 were related to reforms in the territorial administrative division, in public administration, and in education and especially in higher education, and efforts to reform the judicial system continue as well. The priority fiscal reforms are related with the progressive tax, some changes in the customs system, support of business via VAT reimbursement during the economic crisis, and improvement of public services and rural infrastructure.

The reforms in the fiscal sector have not yielded the expected results. According to the World Bank report "Doing Business 2016" (published in October 2015) on the ease of doing business, Albania has dropped by 35 places, from the 62nd position to the 97th. The main reasons for this decline are: blocking of construction permits, increased taxes as a percentage of profit, difficulties in getting credit, an increase in energy prices, difficulties in registering property registering, difficulties in starting a new business, etc.

Efforts have continued regarding approximation of Albania's legislation to the *acquis* of the EU.

Although GDP growth has been relatively higher compared to the previous two years,

employment growth has been at low levels with just a few new jobs created in the private fashion sector (textile, leather, shoes, etc.). The Government has taken measures to establish a positive climate for business development and the promotion of employment by supporting enterprises and companies that employ various categories of unemployed people. Unemployment is high and the number of young unemployed is increasing.

After a five-year process, a new Labour Code was adopted by the Government and Parliament in 2015. The Code reflects some of the proposals submitted by the social partners and recommendations by the ILO and EU. The new Labour Code improves some chapters, mainly those regulating labour relations between employees and employers, the issue of payment for strenuous work and late hours, maternity leave, special protection for women, temporary employment, safety and health at work, prohibition of discrimination, social dialogue and the recommendations of the Committee of Experts of the Social Justice Council of Europe. Some of the requirements of the trade unions regarding labour relations were partly reflected in the new Labour Code.

In support of the labour market during 2015, programs to promote employment supported by government funds positively influenced the employment of people in need and promoted vocational training for young people. However, employment in general, and especially for young people, is still a challenge.

In 2014 and 2015 trade unions played a positive role in the protection of employees, mainly in enterprises with many workers. Trade unions in these enterprises have cooperated with employers to absorb the consequences of job shortages due to the crisis. In this way, employees benefited from better protection through the trade unions. Although trade unions are more prevalent in the public sector, they were unable to protect thousands of workers who have been dismissed from work for political reasons after elections and rotation of political power.

3. INDUSTRIAL RELATIONS

In Albania the number of trade unions is high, with around 80 trade unions recognized and operating on behalf of employees in Albania. The total number of employees is 946,163. Collective agreements cover about 366,510 employees. The number of employees with

actual membership in trade unions is 106,000. Most unions operate under the umbrella of the two confederations, while the remainder operate independently. The two biggest and most influential confederations are: the Confederation of Trade Unions of Albania (KSSH), and the Union of the Independent Trade Unions of Albania (BSPSH), which are represented with 10 members in the National Labour Council. The two biggest confederations represent about 90 per cent of the members of trade unions in Albania. KSSH and BSPSH are represented in 12 regions in Albania and are mainly concentrated in the sectors of education and science, health, public administration, industry, metallurgy, textiles, construction, agriculture, transport and telecommunication, oil and trade. A characteristic feature in Albania is that trade unions have grown in the public sector and in private enterprises that were former state enterprises but representation is lower in the private sector.

In 2015 there were not any changes in the structure of the trade union movement. The Union of the Independent Trade Unions of Albania (BSPSH) held its 6th Congress in September 2014. The Confederation of Trade Unions of Albania (KSSH) held its 5th Congress on 30 November 2014. The mandates of the elected trade union leaders will expire 5 years. In 2015, expired collective agreements were renewed by the social partners. The number of new collective agreements signed during 2015 in the private sector was relatively low.

Except for the public education sector, there are no broad collective agreements at the national level from which a large number of employees could benefit.

During 2015 in Fushe Arres (a region in the north of the country), workers of the company "Ber Alb", a Turkish concession for extracting and processing of copper in the area of Puka, protested several times against the decision of the company to cease activity for one year and lay off 500 workers. These protests were led by the Union of Independent Trade Unions of Albania (BSPSH). The workers have demanded continuation of work and respect for the collective agreement that was signed with expiration in June 2017.

In September 2015 BSPSH organized a protest against the government to draw attention to the socio-economic problems in the region of Shkodra. Key demands were a fight against corruption, free health care, tax reduction, and equal applicability of the law.

Led by the oil workers' union, hundreds of oil workers in Ballsh organized a strike for several days demanding improved working conditions, regular payment of salaries and life insurance in case of workplace-related deaths. Their demand for life insurance was in response to medical findings of high levels of phenol in the workers' blood and a lot of them not reaching retirement age. A few deaths have also been reported due to carcinogenic substances at work.

Since the political changes in the 1990s, KSSH has organized protests and manifestations on May 1st. The main demands in 2015 were related to employment, occupational safety, social justice, reforms in education, health, welfare and pensions, against aggravation of the economic situation, obstacles to the country's integration into the EU, and corruption.

The Federation of Transport Workers Unions in February 2015 several times organized a strike in support of the demands of urban transport employees in Tirana to increase their salaries.

Two education unions, FSASH and SPASH, in the month of May 2015 protested against the Ministry of Education and Sports. Their main demands were linked with the introduction of performance tests for teachers and dismissals of those who were termed "unmotivated", mainly in high school education.

The Federation of Workers of Textile, Clothing and Craft and the State Labour Inspectorate and Social Services, signed a cooperation agreement aimed at a joint contribution by the parties in reducing informal work and improving working conditions, wages, and professional qualification and other matters related to labour relations.

Several demonstrations were organized during 2015 and the most important ones were: against unfair dismissal from work for political reasons, for cheaper electricity as people in need cannot afford the high prices, against the legislation reforming higher education, and against tax increases, especially on small business.

The main employers' organizations were active during 2015, taking stances against: tax increases by the government; extreme measures and punishment up to imprisonment for violation of administrative rules; frequent controls and extreme behaviour by inspectors; and changes in tax legislation that they said

brought restriction of business and employment growth.

4. TRIPARTITE SOCIAL DIALOGUE

The National Labour Council (NLC) is a tripartite consultative body with representatives of the Council of Ministers and the organizations of employers and employees. NLC conducts consultations, takes decisions by consensus and makes specific recommendations to the Council of Ministers, through the Minister of Social Welfare and Youth.

The National Labour Council was restructured in an effort to strengthen the tripartite social dialogue. In this Council, the Government is represented with 7 ministers, trade unions with 10 members and employers with 10 members. The National Labour Council held regular meetings during 2015 and various economic-social issues were reviewed before a decision was taken on them. Some of the main issues dealt with by the NLC were: reforms in the area of pensions, reduction of the age of retirement for miners from 60 to 55 years, testing of professional skills of doctors and nurses, teachers, draft employment promotion and craftsmanship for unemployed job seekers, a draft policy document for safety and health at work 2015-2020, and others.

At the Ministry of Social Welfare and Youth, at the national level, is the National Reconciliation Office⁶ with five representatives (one from the Ministry, two from employees' organizations and two from employers' organizations). Tripartite social dialogue, at the local level, was improved due to its establishment and operation. At the Regional Department of the National Employment Service in 12 regions of Albania, the Reconciliation Offices are established and operate with representatives from the National Employment Service, employees' organizations and employers' organizations. The sectorial and bipartite dialogue still remains weak, mainly due to the insufficient culture of trade unions, or lack of dialogue culture, and employers' scepticism towards the trade unions. Collective agreements and negotiations are more developed in urban areas, especially in Tirana, Durres, Vlora and Shkodra, as the biggest numbers of enter-

prises are concentrated in these cities. Institutionalization of cooperation at the grassroots and enterprise level, between legal representatives of trade unions, employers and state structures should lead to improvement in social dialogue and better protection of employees. These efforts should help to avoid recurrent conflicting situations between social partners at the grassroots level, or even as high as at the National Labour Council's discussions. Cooperation and improvement of social dialogue is one of the EU's requests for Albania's integration into EU.

5. FORECASTS

Economic growth (GDP) is expected to gradually recover and is projected to reach 3.4 per cent in 2016. Expansion of economic activity is expected to grow, supported by growth of private consumption and public investments with a constant trend during the period 2015-2017 of an average of 5.3 per cent of GDP. An increasing level of employment in the country as well as salary and pension increases is expected since during 2014-2015 there were no increases.

Now that Albania has obtained EU candidate status, it is in the phase of opening EU accession negotiations and must meet the priorities set by the EU. Significant influence is expected in: reforms of the energy sector; the fight against fiscal evasion; an increase in efficiency in using public funds; undertaking of tax reforms; improvement of the business climate; supporting assistance packages in various sectors of the economy such as agriculture, tourism, manufacturing and other rising sectors; an increase of FDI, especially in energy; and an increase in exports.

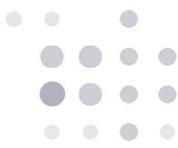
The fiscal 2016 budget package calls for higher taxes on: luxury cars; a beer excise tax; car, property, life and health, insurance; hotel accommodation; and land and property. There will be an increase in contributions paid by the self-employed and so-called "free professions" as regulated by the law, such as lawyers, notaries, dentists, pharmacists, or psychologists, which will be calculated on the maximum salary. The fiscal budget provides for the abolition of tax on small businesses.

⁶ Order of Minister of Social Welfare and Youth No. 203, dated 24.10.2014, "On establishment and operation of State Reconciliation Offices".



Further improvements are required by the EU on issues such as protection of property, public administration, human rights, and others. Positive developments are expected for 2016 in the areas of social dialogue and working relations and improvement in relations between

employees and employers in both the state and private sectors. The activities of trade unions are expected to undergo positive development in fulfilling the requirements and working conditions of employees.



ANNEX OF DATA

- **Collective bargaining system**

The most important collective bargaining agreements are those signed between the central institutions and trade union federations at the national level. In the health sector, in February 2015 the Collective Labour Contract First Level between the Ministry of Health and the Health Workers Federation of Albania (FSPSHSH), a member of the trade union confederation KSSH, was signed. This contract is intended to regulate legal labour relations and respect the rights and duties among all employees covered by the Ministry in its capacity as employer and the union regarding the quality of the employees. The contract covers the period 2015-2018. The bargaining of the Health Federation with the Public Health Directorate covers all the workers in the health sector.

The collective labour contract signed in August 2015 between the Social Security Institute and the Federation of Trade Unions of Financial Services, Commercial, Banking and Tourism (Member of KSSH) to protect the rights of employees in terms of salary and bonuses, working time, conditions and safety at work, trade union rights concessional terms for the work of women, gender equality, recruitment and dismissal. The collective contract has a three-year term and the effects extend to all employees of the Social Security Institute, the Archives Department of Social Insurance and Social Insurance Regional Directorates in the districts.

A collective bargaining agreement was reached in education, signed by the Trade Union Federation of Education and Science of Albania (FSASH), the Independent Trade Union of Education of Albania (SPASH) and the Ministry of Education and Science. This contract covers the entire pre-university education system.

The collective bargaining of the Trade Union Federation of Industry Employees of Albania covers former state enterprises that have been privatized and are active in the energy sector. Branch-collective agreements mainly occur at the national level, or at the regional level, between the relevant branch trade unions and the employers; they cover minimum wage, remuneration in case of dismissal, overtime work, term of contract and the free activity of trade unions. They mostly deal with branch

level negotiations that involve all the relevant enterprises.

Collective bargaining at the enterprise level makes up the biggest number of collective bargaining agreements and is equivalent to bargaining at branch level, but suited to a specific enterprise. In this case the partners in negotiations are the employer and the enterprise trade unions. They are more frequent in the garment sector, which is highly developed in Albania compared to other sectors. However, they are, rather remarkably, present in the construction and other sectors.

In some cases, collective agreements are connected as result cooperation between different trade union federations of the same profession, as are the agreements of trade union federations of education which together signed the collective agreements with the Ministry of Education; trade unions federations in industry (energy sector) have signed collective agreements at the enterprise level; trade union federations of construction have signed collective agreements at the enterprise level in the construction sector.

- **System of tripartite social dialogue**

The National Labour Council (NLC) is the highest level institution of cooperation for social partners (Government-Employers-Employees). It was founded in 1997 and its activity is continuously improving. The representation of employers and employees to the NLC is determined by their organization and activity. The main indicators of trade unions' performance are the number of members who pay a monthly fee for membership in the trade union ("quota"), number of collective agreements signed, number of employees covered by these agreements, number of branches/professions and territorial organizations, engagement in negotiations and resolution of conflicts through mediation and membership in international organizations.

The National Labour Council may establish specialized tripartite commissions in which the social partners, unions, employers and the government, are represented.

Currently, the National Labour Council has established the following working commissions: Wages and Pension, Economy and Finance,

Employment and Vocational Training, Working Conditions, Health and Security at Work, Legal Affairs, and Equal Opportunities.

Besides NLC as the highest institution for social dialogue and partnership, cooperation and democratic governance are institutionalized in the establishment and operation of the Administrative Council. Some of the main institutions run by the Administrative Council are: the Social Security Institute (SSI), the National Employment Service (NES), and the Institute of Health Insurance (SSI). The cooperation between different partners, special cooperation and coordination among the trade union confederations themselves remains indispensable for the interest of all social partners and especially of the employees and trade union activity.

- **Social security system**

Coverage of the labour force within insurance systems (social security, health insurance, pension, unemployment insurance) is relatively low. Of the total labour force in Albania, only 67.5 per cent are insured. Employees in the public sector are all insured as their contributions are calculated from state budget funds.

Coverage of labour force by social insurance

(In number and percentage)

Name/sector	Employment 2015	Social insurance	
		Number	%
State sector	163,730	163,730	100
Private non-agricultural sector	325,665	325,665	100
Private agricultural sector	456,768	127,728	28
-Unemployed (receiving an unemployment payment)		11,304	100
-Self-employed, others		8,534	100
Total	946,163	636,961	67.5

Source: INSTAT, *Quarterly Labour Force Survey 2015*
ISSH. *The book of statistical 2015*

- **Education and vocational training**

Albania spends less on education in terms of its GDP share than other countries in the region: 2.8 per cent in 2015 compared to 4.6 per cent, which is the average share of GDP spent on education in Eastern Europe. The 2016 budget for education is expected to be even about 9 per cent lower.

Employees in the private sector (non-agricultural) who are registered by their employers pay the insurance. This does not cover those employees in the informal economy that do not pay insurance or other state obligations.

The number of employees in the private agricultural sector in Albania, 456,768 (or 48.2 per cent of total employment) is very high compared to the number of employees in the non-agricultural private sector, 325,665 persons. The payment of social insurance from employees in the agricultural sector is only at the level of 28 per cent. This burdens the social insurance scheme because the number of contributors in relation to beneficiaries is very low.

The number of contributors to the social insurance scheme is 636,961 persons, while the number of beneficiaries is 585,483 persons. The beneficiary/contributor ratio is 1/1.1. These statistical data show that immediate measures should be taken in order to increase the number of contributors to the social insurance scheme by fighting informal employment and increasing the insurance contribution amount.

The reform undertaken in 2015 in the area of social insurance and the adoption of a law by Parliament increased the retirement age for males and females, as well as the working years required to receive a full pension benefit.

The reform in higher education is focused on monitoring and legal assessment of public and private education as well as development of the legal framework. Efforts are being made to enhance the quality of education in Albania, especially of higher education. The large number of private, unaccredited and low quality higher education institutions, remains a serious concern, especially in relation to Albania's population.

Youth unemployment is very high, twice as high as the national unemployment rate. Taking into account the high unemployment rate of young people, especially of the ones who have a degree in higher education, and the demands of employers in the labour market, which are mainly for technicians and specialists, vocational education has been proclaimed as one of the priorities of the Government in the field of education. Vocational education is being stimulated and efforts to adapt the best experiences of Western countries in this field are being made in order to increase the professional training of students in vocational schools in accordance with market demands.

Vocational education is still facing a number of difficulties related to the perceptions of students, parents and the labour market of this type of education, the low number of students enrolled in this type of education, the lack of qualitative experts in such schools and a weak commitment by social partners. According to data of the Vocational Education and Training Agency, students from vocational schools make up about 20 per cent of students enrolled in higher education. There are 40 such schools, located mainly in cities, with only three of them focusing on agriculture and agro-business located in rural areas.

- **Employment rate**

(In number and percentage)

Description	2012	2013	2014	2015
Employment total: (I+II+III)	959,502	916,916	925,339	946,163
I. Public state sector	164,400	163,900	163,885	163,730
II. Private non-agriculture sector	268,690	290,763	318,571	325,665
III. Private agriculture sector	526,412	462,253	442,883	456,768
Employment by private sector: (%)	100	100	100	100
Agriculture	46.2	44.3	43.5	40.6
Manufacturing	7.1	7.5	8.1	9.3
Construction	8.2	7.1	6.4	7.3
Mining, Electricity, Gas and Water	1.9	2.2	2.9	2.6
Market service	21.6	21.9	22.2	22.9
Non-market service	15.0	17.0	16.9	17.3

Note: Annual average

Source: INSTAT, Statistical Yearbook 2015

INSTAT. Quarterly survey of the labour force. Second Quarter 2015

- **Unemployment rate**

(In number and percentage)

Measure	2012	2013	2014	2015
Unemployed	142,530	194,043	219,797	219,585
Unemployment rate (%)	13.8	16.4	17.5	17.4*
Registered unemployed (number)	142,530	142,648	141,998	145,478
Unemployed getting an unemployment payment (number)	9,772	7,824	7,395	7,163
Unemployed getting an unemployment payment (in %)	6.8	5.5	5.3	4.9
Unemployment rate, ages 15-29 (%)	26.1	27.2	32.5	34.2

Source: INSTAT: Statistical Yearbook 2015; Labour Market 2014; Quarterly Statistical Bulletin 2 -2015; Quarterly survey of the labour force. Second Quarter 2015

- **Average monthly wage**

The average monthly wage has been increasing from year to year but there are large differences by economic sector. The highest average wage is in the industrial sector at 483 € per month. In general, employees' wages are very low, especially in the private sector. In 2015, the average monthly wage in the private sector was 325 € while it was 378 € in the state

sector. The average wage in the public sector is much higher than in the private sector.

Wages in the private sector such as in industry, transport, telecommunication, and others should be higher. According to inspections by the State Labour Inspectorate (SLI) 62 per cent of employees in the private sector had minimum wage salaries, based on which personal income tax and payment of social and health insurance contributions are calculated.

Average monthly wage by economic activity (in €)

Wage according to sectors ⁷ (in €)	2011	2012	2013	2014
Average monthly wage (private sector)	302	315	331	325
Industry	324	337	354	483
Construction	288	293	310	256
Transport and telecommunication	310	315	338	345
Trade	297	302	315	221
Agriculture, forestry, fishing	290	326	337	243
Average monthly wage (state sector)	333	358	366	378
Education	363	395	421	390
Health	323	337	375	340

Source: INSTAT, Statistical Yearbook 2015
INSTAT, Labour Market 2014

During 2015, there was no increase in either the minimum wage or in salaries in general; also the 13th wage or bonus at the end of the year was not paid.

- **Gender pay gap**

The average gross monthly salary for an employee (private sector) in Albania was 325 € in 2014. The gender pay gap was 10 per cent, meaning that male employees have a gross

average monthly wage 10 per cent higher than female employees⁸. For an employee in public enterprises the gross average monthly wage is 378 €. In public enterprises the gender pay gap is insignificant.

In the agricultural sector the gender gap in pay is 10 per cent, 44 per cent in the extractive industry, 32 per cent in manufacturing, 10 per cent in construction, 14 per cent in trade, 15 per cent in education and 24 per cent in health care.

⁷ INSTAT: Albanian in figures. Salaries. Tirana 2014

⁸ INSTAT, Labour Market 2014

The gross average monthly wage per employee in foreign enterprises is more than two times higher for males than females; the gender gap is 55 per cent.

The “gender pay gap in Albania”, is due to different rewards provided by the labour market. The division of professions on gender basis, lack of experience, child care and part-time jobs, are the main reasons that contribute to female’s salaries being lower than those of males.

Females in the agriculture private sector account for the highest percentage of all women employed (54.4 per cent). In the state sector, females account for 48 per cent of the total

employment. In the health and education sectors, females make up the biggest proportion of the employees, respectively 68.2 per cent and 72.4 per cent, whereas in construction and transport and telecommunication males account for respectively 97.3 per cent and 80.5 per cent of all the employees.

- **Monthly minimums**

The minimum official wage, the monthly unemployment benefit, the social welfare benefit for households and the minimum pension are presented below:

(in €)

Monthly incomes	2012	2013	2014	2015
Minimum official wage	151	158	158	158
Monthly unemployment benefit	50	50	50	50
Full social assistance for a household	32	32	32	33
Partial social assistance for a household	24	24	24	27
Minimum pension (urban)	83	86	88	88
Minimum pension (rural)	56	60	60	60

Source: INSTAT, *Statistical Yearbook 2010-2014*.
INSTAT, *Albania in figures 2013, Tirana 2014*

- **Actual weekly working hours**

Daily and weekly working hours are regulated by law. According to Article 78 of the Labour Code the duration of the normal working day is not more than eight hours. Article 83 states that the number of normal weekly working hours is not more than 40 as set in a Decision of the Council of Ministers through collective bargaining.

According to the data of Ministry of Labour and Social Welfare, based on inspections conducted by the State Labour Inspectorate in the private sector, it was found that 94.9 per cent of the total working hours were within the weekly working time of 40-48 hours and 5.3 per cent were over 48 hours. The weekly working time over 48 hours was higher for females than for males; for males it was 3.7 per cent while for females it was 5.6 per cent. Employees with annual paid leave less than 28 days make up 4.1 per cent of the total employees who were identified as private subjects during inspections.

- **Normal work / atypical work**

Data for this category of employees are limited, but this type of employment is particularly frequent in the private sector, especially in the service sector such as house helpers, child-care assistants and cleaning personnel. These are mainly women’s jobs undertaken over long-term time periods or as part-time jobs. Men tend to work in different sectors, such as the construction sector. My opinion is that atypical work covers up to 10 per cent of the overall employment, while the number of women employed in atypical work is double that of men.

Official data of the State Labour Inspectorate (SLI), emerging from checks conducted of private entities show 4,650 atypical employees (identified in 2,460 subjects).

Number of employers and atypical work, inspections by SLI



(In number and percentage)

Employment by sector	Employment	Inspections (SLI)			
		Inspections by sector	Atypical subjects	Atypical employees	%
State sector	163,730	188			
Private non-agricultural sector	325,665	15,870	2,460	4,650	1.5
Private agricultural sector	456,768	131			
Total	946,163	16,189			

Source: INSTAT, Statistical Yearbook 2015.

INSTAT. Quarterly survey of the labour force Second Quarter 2015

State Labour Inspectorate (SLI), statistics data

By type of employment contract, 10.9 per cent of wage employees (aged 15-64 years old) had a work contract with a specified duration in 2012. This proportion has tended to increase, reaching 13.7 per cent in 2015.

- **Migration**

According to the Institute of Statistics the population of Albania on 1 January 2015 was 2,893,000 inhabitants and a drop of 2,942 inhabitants compared to 1 January 2014. The average age of the population is 35 years. The estimated number of people who migrated and left the country is 46,413.

It is estimated that there are about 1.4 million Albanian emigrants⁹, or 30 per cent of the country's population. Given that emigration is chaotic, clandestine and unregistered, figures on this phenomenon are not very accurate. The main cause of emigration was poverty or unemployment (80 per cent), whereas the other 20 per cent emigrated due to social, cultural, and security issues (blood feuds are of special concern in Albania). Greece, where most emigrants reside, is suffering a harsh economic crisis and many Albanian emigrants

are returning back home. Also, Italy and other countries are not in a positive economic situation for employment and treatment of emigrants.

According to the Immigration Agency in Germany, in 2015 (January-September) over 45,000 requests for asylum were registered from Albanian nationals, the second largest group after Syrians. The number is very high and very disturbing. The number of asylum seekers from Albania during the year increased by more than 12 times compared with 2014.

Remittances during the period from 2011 to 2013 were reduced significantly as a result of the crisis. During the past two years, 2014-2015, they increased again but not to the previous level. The primary reason for this is the economic crisis and the fact that most emigrants have been living outside Albania for more than 10 years and have started to cut family relations and reduce remittances.

The drop in remittances have effects in the domestic economy and influence the level of poverty because a major part of remittances were sent by emigrants to their families for daily consumption since state support for the unemployed and people in need is very small.

⁹ According to the Civil Registry Office, Albania has 4.2 million inhabitants while according to the latest census, published in 2012, Albania has a population of 2.8 million inhabitants. The

difference of 1.4 million people represents the number of Albanians who have migrated.



Remittances from emigrants, 2012-2015

Year:	2012	2013	2014	2015
Remittances (In million €)	675	543	592	305 (first 6 months of 2015)

Source: *www. Bank of Albania*
www.open.data.al

- **Human Development Index (HDI)**

Year:	2011	2012	2013	2014
Human Development Index (HDI)	0.714	0.714	0.716	0.716

Source: *http://hdr.undp.org: Human Development Report*

Albania ranks 95 in the international index with the Human Development Index at 0.716; Life expectancy at birth (years) 77.4; Mean years of schooling (years) 9.3; Expected years of schooling (years) 10.8; Gross national income (GNI) per capita (PPP \$) 9,225; Change in rank, 2012-2013 was + 2.

- **Gini-coefficient**

Albania has a Gini-coefficient of 34.5 per cent. These data for Albania reflect the disparity in consumption, which has a tendency of being more fairly distributed than incomes. The Gini-coefficient international rankings for recent years are not available.

- **Collective agreement coverage**

At the branch level there are a total of 21 signed collective agreements in the public and private sectors in the fields of education, health, public affairs, transport, energy, oil, agriculture, environment, public order, and construction, covering 158,420 employees. At the enterprise level there are 574 collective contracts signed in the public and private sectors, with a total of 76,700 employees covered by collective bargaining at the enterprise level. (There are currently 12 collective bargaining agreements between the Federations and the respective ministries or the General Directorates, which cover over 121,830 employees; and nine collective bargaining agreements between Federations and public institutions that cover 36,590 employees).

Collective agreement coverage by sectors

(In number and percentage)

Name	Employees 2015	Collective agreement coverage		
		Contracts	Employees	%
Public sector (branch level)	163,730	12	121,830	74.4
Private non-agricultural sector:	325,665		113,290	34.7
- branch level		9	36,590	
- enterprise level		574	76,700	
Private agricultural sector	456,768	38	17,100	3.8
- enterprise level				
Total	946,163	633	365,510	38.6

Source: *INSTAT, Statistical Yearbook 2015.*
MLSAEO, Administrative data. Trade Union

In the state/public sector, about 74.4 per cent of employees are covered by collective bargaining agreements, most belonging to the education and health sectors. In the non-agricultural private sector, which employed 325,665

employees in 2015, according to the data in the table above, only 34.7 per cent are covered by collective bargaining. In the private agricultural sector, which employed a total of



456,768 persons in 2015, the number of agreements is very small.

- **Ongoing important collective bargaining agreements**

During 2015, efforts by the trade unions continued to ensure the enforcement of many previously-signed collective bargaining agreements as well as negotiation of replacement or new contracts. The Trade Union Federation of Education and Science of Albania (FSASH) and the Independent Trade Union of Education of Albania (SPASH) negotiated one of most important collective agreements in the country, in the education sector, during the period 2010-2014, signed by the Ministry of Education and Science. Until then, no new contract with the Education Ministry had been signed by these two unions and the education unions that are part of KSSH.

In addition, there are also positive developments regarding the new collective bargaining agreements in the textile, fashion, industry, health, construction, education and other sectors. There was an increase of collective bargaining at the enterprise level compared to 2014, meaning that there are more agreements, leading to an increase in coverage of employees than in 2014. The Trade Union Federation of the Workers of Textile, Confections and Handicraft of Albania (affiliated to KSSH) and the Independent Trade Union of the Textile Industry (affiliated to BSPSH) signed new collective bargaining agreements in textile enterprises.

The Trade Union Federation of Industry Employees of Albania, a member of KSSH, in 2015 negotiated or renegotiated 8 collective agreements belonging to the energy and mining sectors such as Albanian Power Corporation (KESH), Electricity Distribution Operator

(OSHEE), and others covering 12,000 workers who are members of this federation. The Independent Trade Union of Construction and Public Works Employees of Albania (BSPSH) reached several agreements with entities in the construction sector, in public works, in cleaning and maintenance sectors, and others.

The Trade Union Federation of Construction, Paper, Wood and Public Infrastructure Employees of Albania (FSNLDIP) continued signing collective bargaining agreements in enterprises and private entities dealing with construction, service, public infrastructure, etc. It signed an important collective agreement with the Association of Public Services which covers workers in cleaning sector, greenery, maintenance, etc.

The Federation of Trade Unions of Workers of Education and Science of Albania, (a member of KSSH) continued its expansion in the private and state sector and it is in talks with the Ministry to sign a collective contract of the first level.

Despite improvements and a growing of number of contracts and employees covered by collective contracts, trade union fragmentation and in particular the existence of several trade unions and federations covering one profession, frequently even in one district or enterprise operations, remain problematic.

- **Trade union density**

The analysis of the labour market and membership of trade unions in Albania shows that out of 163,730 employed in the state sector, (according to the trade union data) about 100,000 are trade union members; half of them belonging to the education and health sectors.



The number of employed by sector and membership in trade unions

(In number and percentage)

Name	Employed 2015	Supporters		Actual (paying members)	
		Number	%	Number	%
Public sector	163,730	100,000	61	41,000	25
Private non-agricultural sector	325,665	100,000	31	54,000	16
Private agricultural sector	456,768	12,000	2.6	11,000	2.5
Total:	946,163	212,000	22.5	106,000	11.2

Source: INSTAT. Trade unions; data processed by author.

Often, trade unions report their membership based on their supporters (virtual members totalling 212,000), and not on actual paying members. The number of employees from the private sector who are members of trade unions is very low (only 11.2 per cent). Increasing union membership in the private sector remains the main challenge for the future of trade unions of Albania.

- **Employers’ organizations density**

Albania has a total of about 112,534 active enterprises¹⁰ and half of them are concentrated in the regions of Tirana and Durrës (out of which 101,025 or 89.8 per cent employ 1-4 people, 5,387 or 4.8 per cent employ 5-9 people, 4,647 or 4.1 per cent employ 10-49 people, and 1,478 or 1.3 per cent employ over 50 people). Enterprise producers of goods 15.1 per cent (industry 9 per cent, construction 4.1, agriculture 2); enterprise producers of services 84.9 per cent (enterprises with main activities of trade 40 per cent, transport and storage 6.7, hotels, bars and restaurants 16, information and communication 2.3, other services 19.9) dominate in number. The enterprises are small when it comes to numbers and most are not members of an employer’s organizations but when it comes to their relevance in terms of the national income for their size most of these businesses are members of “Business Albania”¹¹ or of other employer’s organizations. The employers’ organizations are getting consolidated. In 2012-2014 there were about 30 employers’ organizations. The majority of them, over 25 employers’ organizations and associations, have joined together to form a bigger organization of Albanian employers called “Business Albania”.

- **Workplace representation**

Trade union councils are organizations that represent the workers in enterprises. These councils are smaller units of syndicalism. The trade union council in an enterprise or workplace carries out its function in compliance with the charter of federation and the collective agreement. The establishment of works councils in enterprises is a new thing and an unknown phenomenon for Albanian workers. Although experience is lacking, some training courses were organized by the trade unions and Friedrich-Ebert-Stiftung contributed by sharing the experience of Germany in labour councils.

Differences between Works Councils and Trade Union Councils, relations and cooperation between Trade Unions and Works Councils in enterprises, benefits and issues concerning both parties were identified. Establishment of works councils in enterprises marks the beginning of this process, in compliance with EU Directives, as an indispensable European social norm. Trade unions should use this additional instrument in order to increase their competencies in labour relations and strengthen the protection of workers’ interests. Trade unions are the main representative authorities of employees at a workplace but Albanian legislation allows for selected representatives of the employees if there are no members of organized trade unions. Trade union representatives at the workplace play an important role in negotiations and in collective bargaining with the employers. Trade union organizations at the work place are the main representative bodies for employees. There are not yet other bodies representing employees,

¹⁰ INSTAT. The Register of Enterprises. Tirana 2015

¹¹ Established in 2011 due to a need to represent the interests of employer organizations, to build their capacities and to promote socio-economic policies, and to support and develop free entrepreneurship and the labor market.



except for the procedure in implementation of Law No. 10237, of 18 February 2010 “On Occupational Health and Safety”, allowing for the establishment of Occupational Health and Safety Councils with representatives of employees. The Decision of the Council of Ministers No. 108 dated 9 February 2011 on the skills needed from employees dealing with occupational health and safety is being implemented.

• **Trade unions**

In 2014, the trade unions of Albania underwent no significant change. 83 trade unions are recognized in Albania. Most of them (over 90 per cent) are part of confederations, whereas the remaining part, although high in number, represent less than 10 per cent of the trade union membership in Albania.

○ **National Trade Union Confederations**

Table of membership in trade union confederations¹²

In number

No.	National trade union confederations	Individual members	International membership
1	Confederation of Trade Unions of Albania <i>Konfederata e Sindikatave të Shqipërisë</i>	105,000	ITUC
2	Union of Independent Trade Unions of Albania <i>Bashkimi i Sindikatave të Pavarura të Shqipërisë</i>	95,000	ITUC
3	Union of Trade Unions of Albania* <i>Bashkimi i Sindikatave të Shqipërisë</i>	-	-
4	Union of Independent Trade Unions* <i>Unioni i Sindikatave të Pavarura</i>	-	-
5	Union of Autonomous Trade Unions* <i>Bashkimi i Sindikatave Autonome</i>	-	-
6	The Confederation of Employees of Albania <i>Konfederata e Punonjësve të Shqipërisë</i>	-	-

Source: ITUC. Report for the WTO General Council Review of the Trade Policies of Albania; www.bsps.org.al, www.kssh.org.al

The Confederation of Trade Unions of Albania and the Union of Trade Unions of Albania represent over 90 per cent of the overall number of trade union members in Albania.

¹² Membership and activity of trade unions called confederations: Union of Trade Unions of Albania, Union of Independent

Trade Unions, and Union of Autonomous Trade Union are low; there is no official data about them.

○ **Trade Union Federations by branches**

No	Trade Union Federation <i>Federata e Sindikatave</i>	International affiliation	National affiliation	National membership
1	The Trade Union Federation of Education, Training and Science <i>Federata e Sindikatave të Punonjësve të Arsimit, Edukimit dhe Shkencës</i>	EI	KSSH	9,500
2	The Trade Union Federation of Industry Employees of Albania <i>Federata e Sindikatave të Punonjësve të Industrisë së Shqipërisë</i>	Industrial-Global Union PSI/EPSU	KSSH	12,500
3	The Trade Union Federation of Civil Service and State Administration Employees <i>Federata e Punonjësve të Shërbimit Civil dhe të Administratës Shtetërore</i>	PSI/EPSU	KSSH	3,000
4	The Trade Union Federation of Health of Albania <i>Federata e Sindikatave të Shëndetësisë të Shqipërisë</i>	PSI/EPSU	KSSH	8,300
5	The Trade Union Federation of Transport and Telecommunication of Albania <i>Federata e Sindikatave të Punonjësve të Transportit dhe Telekomunikacionit</i>	ITF/ETF	KSSH	2,500
6	The Trade Union Federation of Construction, Wood and Public Infrastructure of Albania <i>Federata e Sindikatave të Punonjësve të Ndërtimit, Drurit dhe Infrastrukturës publike</i>	BWI PSI Industrial-Global Union	KSSH	8,000
7	The Trade Union Federation of Textile, Fashion and Craftsmanship <i>Federata e Sindikatave të Punonjësve të Tekstilit, Konfeksioneve dhe Shërbimeve Artizanale</i>	Industrial-Global Union	KSSH	8,500
8	The Trade Union Federation of Employees in Agriculture, Forestry and Environment <i>Federata e Sindikatave të Punonjësve të Bujqësisë, Ushqimit, Pylltarisë dhe Ambjentit</i>	EFFAT IUL	KSSH	2,500
9	The Trade Union Federation of Police Service <i>Federata e Sindikatave të Shërbimit Policor</i>		KSSH	1,500
10	The Trade Union Federation of the Retired and Unemployed <i>Federata e Sindikatave të Pensionistëve dhe të Papunëve</i>	PSI	KSSH	5,000
11	The Trade Union Federation of Financial, and Trade Sector, Banking and Tourism <i>Federata e Sindikatave të Shërbimeve Financiare, Tregtare, Bankare e Turizmit</i>		KSSH	
12	The Trade Union Federation of Press, Media, Culture and Sports Employees		KSSH	

	<i>Federata e Sindikatave të Punonjësve të Shtypit, Medias, Kulturës dhe Sportit</i>			
13	The Independent Trade Union of Education of Albania <i>Sindikata e Pavarur e Arsimit të Shqipërisë</i>	EI	BSPSH	9,800
14	The Independent Trade Union of Miners of Albania <i>Sindikata e Pavarur e Minatorëve të Shqipërisë</i>		BSPSH	8,500
15	The Independent Trade Union of Health of Albania <i>Sindikata e Pavarur e Shëndetësisë Shqiptare</i>		BSPSH	6,500
16	The Independent Trade Union of Telecom of Albania <i>Sindikata e Pavarur e Telekomit të Shqipërisë</i>		BSPSH	
17	The Independent Trade Union of Topography of Albania <i>Sindikata e Pavarur e Tipografëve të Shqipërisë</i>		BSPSH	
18	The Independent Trade Union of Civil Defence and Order Employees of Albania <i>Sindikata e Pavarur e Punonjësve Civilë të Mbrojtjes dhe Rendit</i>	PSI EPSU	BSPSH	3,500
19	The Independent Trade Union of Light and Textile Industry <i>Sindikata e Pavarur e Industrisë së Lehtë dhe Tekstile</i>	Industrial-Global Union	BSPSH	8,000
20	The Independent Trade Union of Artists of Albania <i>Sindikata e Pavarur e Artistëve të Shqipërisë</i>		BSPSH	
21	The Independent Trade Union of Energy of Albania <i>Sindikata e Pavarur e Energjetikës së Shqipërisë</i>	PSI Industrial-Global Union	BSPSH	4,000
22	The Independent Trade Union of the Retired of Albania <i>Sindikata e Pavarur e Pensionistëve të Shqipërisë</i>	PSI	BSPSH	5,500
23	The Independent Trade Union of Construction and Public Works Employees of Albania <i>Sindikata e Pavarur e Punonjësve të Ndërtimit, Punëve Publike të Shqipërisë</i>		BSPSH	8,000
24	The Trade Union Federation of Trade Sector, Banks and Services <i>Federata Sindikale e Tregtisë, Bankave dhe Shërbimeve</i>		FSTBSH	3,000
25	The Trade Union of Oil Industry Workers <i>Sindikata e Punonjësve të Naftës</i>		SPNSH	

Source: The organization department, KSSH; www.bspsh.org.al

Some of the federations that are members of trade union confederations have been merged, thereby reducing the number of federations. This has not damaged the representation and protection of employees, but it is considered as a necessity due to the limited financial sources and membership.

Following its 4th Congress, KSSH approved a new organizational structure mandating a re-composition of some federations by merging some of them and reducing the number of federations from 13 to 8.

The current website of BSPSH reports that the current structure of BSPSH has 11 federations while other federations are being monitored by BSPSH for full membership. The number of federations is not important but the coverage of professions by trade unions/federations and employee representation is of high relevance. Both BSPSH and KSSH cover various professions and represent employees although their composition varies.

• Employers' Organizations

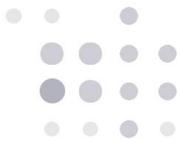
1) Business Albania (*Biznes Albania*):

- Union of the Industrialists and Investors of Albania – represented in the National Labour Council with one representative (*Bashkimi i Industrialistëve dhe Investitorëve të Shqipërisë*)
- The National Union of Civil Guards (*Bashkimi Kombëtar i Rojeve Civile*)
- The Italian Chamber of Commerce in Albania (*Dhoma e Tregtisë e Italisë në Shqipëri*)
- The National Chamber of Fashion Producers (*Dhoma Kombëtare e Prodhuesve të Veshjeve*)
- The Confederation of Entrepreneurs of Construction Materials (*Konfederata e Sipërmarrësve të Materialeve të Ndërtimit*)
- Albanian Confindustria – represented by one person in the National Labour Council (*Konfindustria Shqiptare*)
- The Association of Food and Beverage Businesses of Albania (*Shoqata e Biznesit të Ushqim Pijeve, Albania*)
- The Association of Albanian Publishers (*Shoqata e Botuesve Shqiptarë*)
- The Association of Organic Agriculture (*Shoqata e Bujqësisë Organike*)
- The Association of Albanian Exporters (*Shoqata e Eksportuesve Shqiptarë*)

- The Association of Professional and Business Women (*Shoqata e Grave Profesioniste, Afariste dhe Zejtare*)
- The Association of Meat Importers and Processors (*Shoqata e Grave Profesioniste, Afariste dhe Zejtare*)
- The Association of Accountants and Financial Experts of Albania (*Shoqata e Kontabilistëve dhe Financierëve të Shqipërisë*)
- The Association of Constructors of Albania – it is represented in the National Labour Council with two representatives (*Shoqata e Ndërtuesve të Shqipërisë*)
- The Association of Wood Processing (*Shoqata e Përpunuesve të Drurit*)
- The Association of Bread Producers (*Shoqata e Prodhuesve të Bukës*)
- The Association of Flour Producers (*Shoqata e Prodhuesve të Miellit*)
- The Association of Hydrocarbon Companies (*Shoqata e Shoqërive të Hidrokarbureve*)
- The National Association of Shoe Producers – it is represented with one person in the National Labour Council (*Shoqata Kombëtare e Prodhuesve të Këpucëve*)
- The National Association of International Road Transporters (ANALTIR) (*Shoqata Kombëtare e Transportuesve Rrugorë Ndërkombëtarë*)
- The Environmental Association for Sustainable and Rational Development (*Shoqata Mjedisore për Zhvillim të Qëndrueshëm dhe Racional*)
- The Albanian Tourism Association (*Shoqata Shqiptare e Turizmit*)
- “Dinamo” Agro-Food Market Association (*Shoqata Tregu Agro-Ushqimor “Dinamo”*)
- The Union of Tour Operators of Albania (*Unioni i Operatorëve Turistikë Shqiptarë*)

2) The Council of Employers' Organizations – represented with two representatives in the National Labour Council (*Këshilli i Organizatave të Punëdhënësve të shqipërisë - KOPSH*).

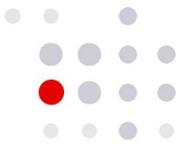
3) The Confederation of the Employers' Organizations Council - represented with two representatives in the National Labour Council (*Konfederata e Këshillit të Organizatave të Punëdhënësve*)



- 4) The Agro-Business Council of Albania - represented with one representative in the National Labour Council (*Këshilli i Agrobiznesit të Shqipërisë*)
- 5) The Union of Business Organizations of Albania (*Bashkimi i Organizatave të Biznesit të Shqipërisë*)

International membership: The main employers' organizations are members of the European Business Confederation (BUSINESS EUROPE).

KOPSH is a member with full rights in the International Organization of Employers.



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