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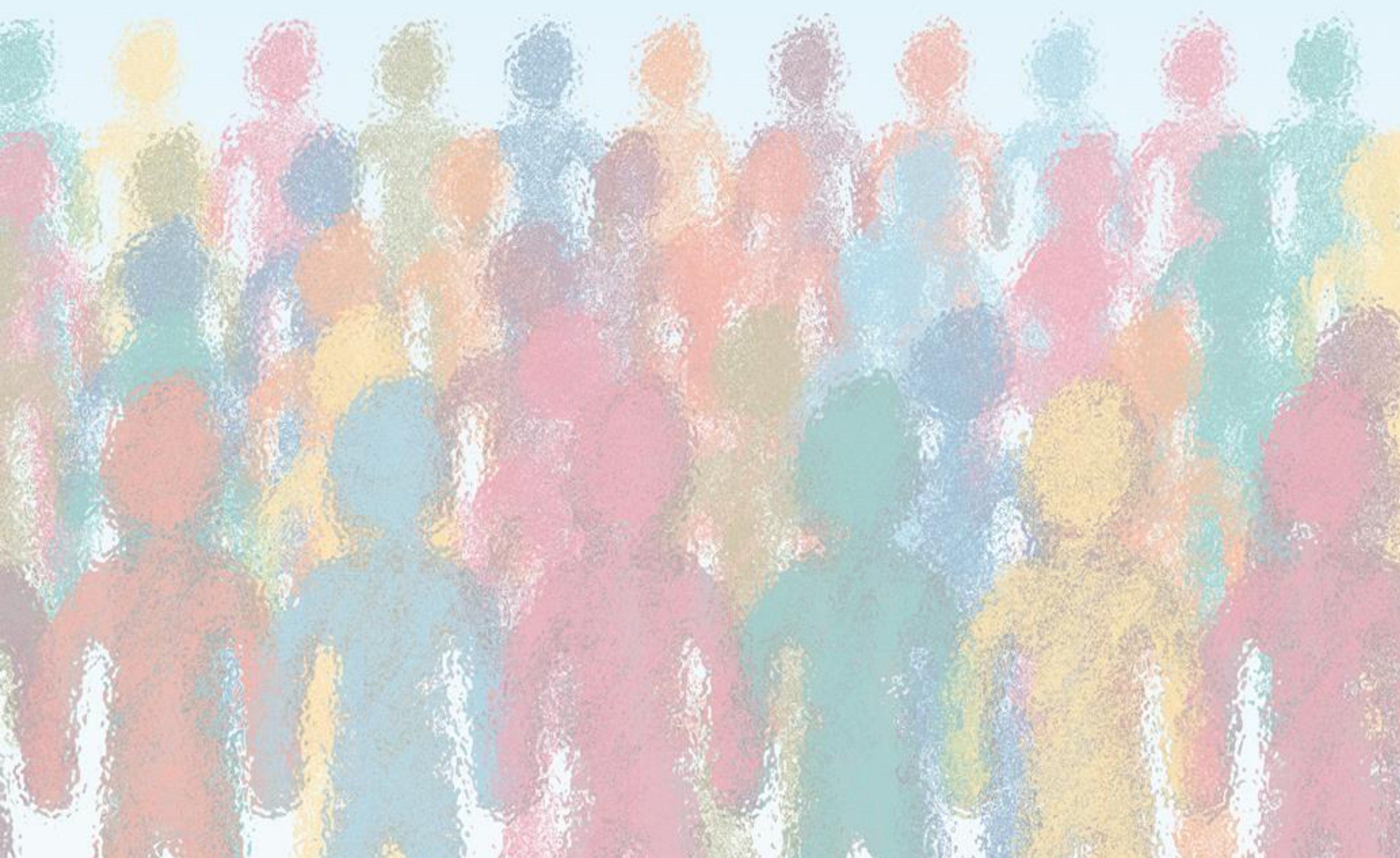
Readiness of Albanian businesses for the EU accession process

A knowledge gap analysis and needs' assessment report



Readiness of Albanian businesses for the EU accession process

A knowledge gap analysis and needs' assessment report

Prepared by:

November 2021

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Executive Summary

The objective of this study is to explore and analyses knowledge and information gaps of Albanian businesses, in the area of EU accession, with a particular focus on identifying and assessing their needs. Albania is on the verge of embarking upon the accession negotiations stage, and inclusiveness and the role of non-state actors is key for ensuring ownership and smooth implementation of the EU legislation and standards. In this regard, the Albanian government has established the European Integration Partnership Platform, which aims at providing a structured fora for informing and including non-state actors' input and contribution in the process. This study aims at contributing to the preparation of business community, in particular, in terms of capacities and knowledge required for the next stages.

In terms of methodology, the approach of this study has involved methods such as, literature and documentation review, a large-scale questionnaire implemented with 188 companies, and follow-up reviews with a few selected participants. The data gathered was processed and analysed through crossing methods by business sector and size, in order to enrich the explored findings. The study report is composed by eight sections: the first one introduces more in detail the topic, the methodology, and the sample characteristics used for the study. The (six) analytical sections of the study explore the different components regarding EU accession and its relations to the Albanian business community. Finally, a summary section of conclusions which also details recommendations for potential capacity building programs is elaborated in the end of the report.

In terms of main findings, the study explains and concludes that:

- Albanian companies have a low level of general information regarding the EU institutional framework and its functioning. Businesses associate the EU and its objectives mostly with economy and the single market, although information about the latter is very low.
- When it comes to costs and benefits from the EU accession process, companies have a medium level of information, however, their knowledge on potential costs is quite low. This has caused confusion and uncertainty among them, regarding the future and their readiness.
- Albanian businesses get most of their information on the EU from the media and their foreign business partners, while public institutions and other sources are behind. Their connection to universities is at the lowest point.
- Main internal obstacles that companies foresee in the process are human resources and financial capacities. While as general challenges coming from public institutions, they consider lack of support and instability of policies as main problems.
- Albanian companies prefer to receive training on EU affairs from their business associations representatives and EU experts, mostly on meeting EU standards, costs, and requirements for their sector.

In the final section of the report, there is a set of concrete recommendations for themes that could be included in capacity building programs for companies, regarding EU accession.

1. Introduction

EU membership has been a strategic priority for Albania for over two decades. The country started its efforts to joining the EU after the fall of communism, especially in the 2000s, after the Thessaloniki European Council in June 2003, where a clear membership perspective was offered to the Western Balkans countries. In 2006, Albania signed the Stabilisation and Association Agreement with the EU, which entered in to force in 2009. In the same year of entry into force of the agreement, Albania submitted the official application for EU membership. Since then, Albania has made significant efforts toward its objective. This process has been of crucial importance to Albania and has constituted a significant part of Albania's development strategy. On 27 June 2014, the European Council granted Albania the candidate status. In April 2018, the European Commission gave the recommendation to open the accession negotiations with Albania. In spite of a positive attitude of the European Council in 2020, up-to-date, member states have not approved the negotiations framework and, therefore, have not decided on a date for the Intergovernmental conference which would officially start the accession negotiations process.

Once negotiations start, the pace and dynamics of interaction with the EU will change, requiring more efforts, energy, expertise, and financial coverage, to fulfil the requirement in each chapter. This transformative process calls for widespread contribution among actors of societies, and not public administration alone, which carries the heaviest part of the burden. All main stakeholders need to be part of these processes, because, on one hand, they can provide legitimacy and increase ownership on the necessary reforms. On the other hand, they can help the implementation by adapting to the new legislation, and by offering their expertise where possible. This applies strongly to business community, in particular. Inclusiveness of business community in the process of accession negotiations, and the European integration process in general, is an important element to the success of these efforts, in terms of raising awareness and facilitating implementation of the acquis. In this regard, the European Integration Partnership Platform (EIPP) will play a key role.

However, a visible lack of knowledge and information regarding the European integration process and EU membership has been registered among business representatives. Their effective contribution to the process will be highly dependable on the level of awareness regarding main aspects of the accession negotiations and how they impact the business community, especially in terms of obligations, costs, benefits, etc. This will require a capacity building approach for EIPP itself, in order to provide them with all necessary knowledge and guidelines to have a clear understanding of the process and its impact.

In this context, this study supported by SANECA project of GIZ Albania, comes as an analytical study with two main objectives: First, it aims at exploring the understanding that companies have regarding the process, its main components, and their patterns on acquiring knowledge and information. Second, based on the analysis of gaps and assessment of needs, the report draws some conclusions and recommendations. Based on these findings, it provides input for tailor-made capacity building programs which can be implemented with the business community, about key notions and basic technical aspects of the accession negotiations process and EU membership. The final objective is to improve and increase business knowledge to effectively contribute and benefit from the process.

1.1. Methodology

This study used as a main research method a comprehensive questionnaire[1], which was formulated by researching and reviewing relevant literature, previous publications and studies done on the topic, and best practices. For this study, a total of **188 questionnaires** were distributed and filled in by administrators of companies from different sectors. Answered questionnaires covered seven different counties of Albania, namely Tirana, Durres, Elbasan, Fier, Shkodra, Korca, and Vlora. The questions were first tested as a pilot stage with 12 companies, before being implemented at large scale. The pilot test was used to improve and fine-tune the questions, in terms of facilitating understanding and clarifying terminology.

The questionnaire explores the level of knowledge and information of companies regarding main components of the process, and how it can affect their activities. The full draft was composed by a total of **44 questions**, aiming at capturing information and perception of the business community. The content of the questionnaire (and the structure of the analysis) is divided into different sections, according to the nature of the questions and the information type that was being explored. The draft of the questionnaire which was used with businesses was translated and implemented in Albanian language, in order to overcome language barriers and potential misunderstandings of the questions. The level of understanding of the questions was also tested during the pilot stage.
The data gathered was analysed by question, and by sector, and company size. Then the experts drafted the report focusing on most interesting findings, which are also graphically represented in this report after each narrative part. After the analysis, a section on concrete recommendations and input for capacity building programs was elaborated (section 8).

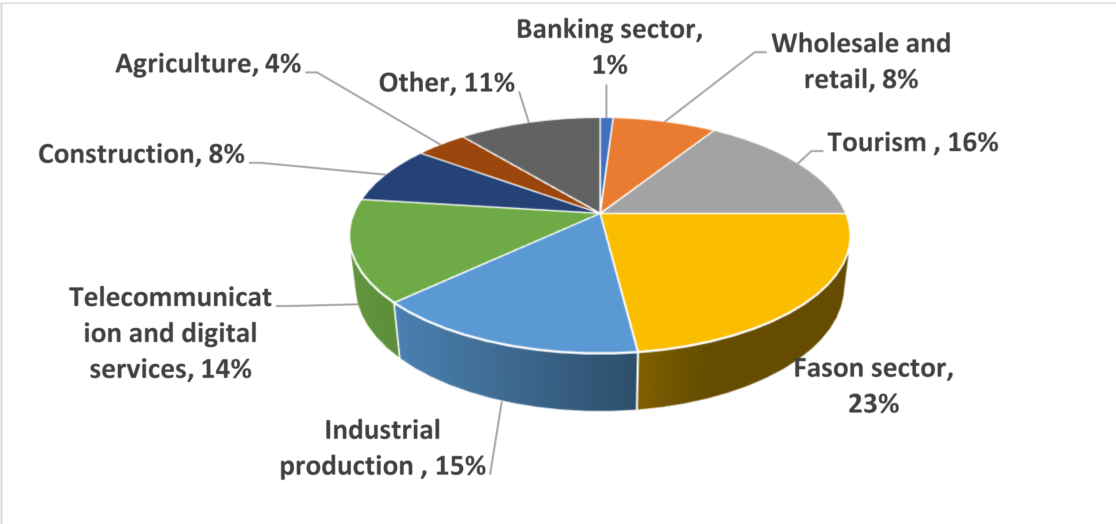
1.2 Study sample

The selected sample of companies takes into consideration an appropriate distribution based on geography, sector, and size of business. Most of the interviewed businesses are located in Tirana with a 42% share, followed by Durres with a 23% share and Fier with 16%, which reflects the density of national businesses in these counties, economically the largest, at the national level.
While geography of the sample is quite concentrated, sector distribution of the interviewed companies is more diverse and spread. Figure 1 illustrates the sectors in which the selected businesses operate, as a percentage of the total sample. A large part of companies is from the fason[2] sector (23%), which is important in terms of the share it holds in Albanian exports and from the social aspect, since it employs a large number of people. In addition, this sector, with profit margins quite low, is under continuous competitive pressure, thus further integration with EU market and its standards and requirements,

[1] You can find the full draft of the questionnaire that was implemented in Annex I.
[2] The term "fason industry" is used in Albania to refer to the inward processing industries of textile, garments and footwear manufacturing, etc.. The partial, or fully finished products represent a major portion of the country's exports.

might represent new/additional challenges in the near future. The rest of the sample reflects and represents some of the other important economic areas, including tourism, industrial production, etc.

Figure 1. Main area/sector of activity of selected companies



In terms of the size of business, below you can find the characteristics of the sample by turnover and number of employees. As figure 2 shows, for the purpose of this study we concentrated more on the medium size businesses, since they have more capacities (and, sometimes, more necessities) for understanding and benefiting actively from the integration processes. We considered the fiscal year 2019 for the turnover, since 2020 was heavily impacted economically by the pandemic, and, therefore, would not be representative of the state of the companies' standard performances. The same approach was used for the number of employees (see figure 3). Around 80% of the selected companies have less than 200 workers.

Figure 2. Distribution of companies in the sample, by turnover for 2019 (in Euro)

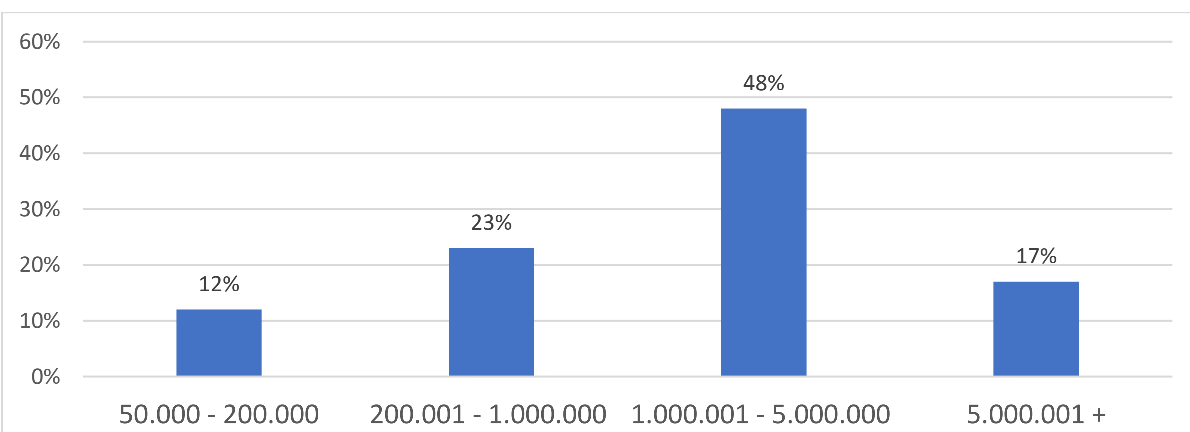
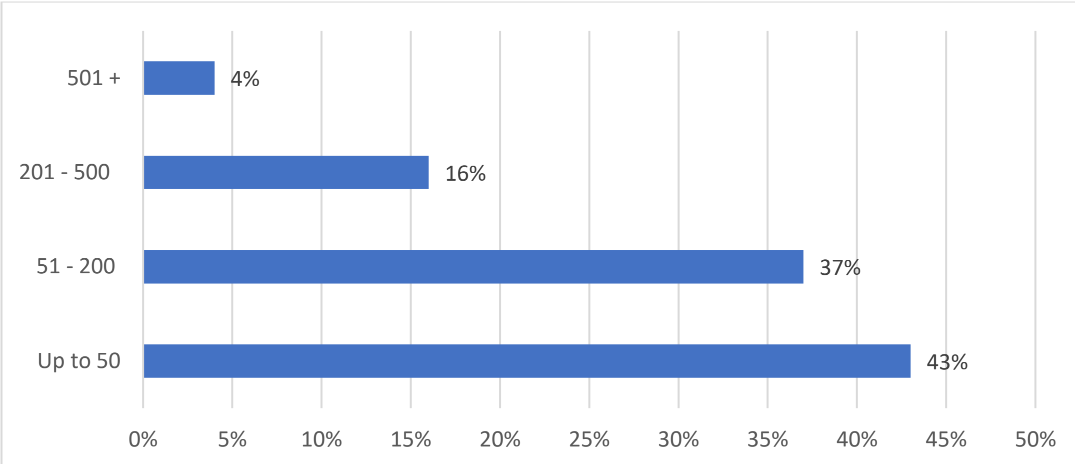
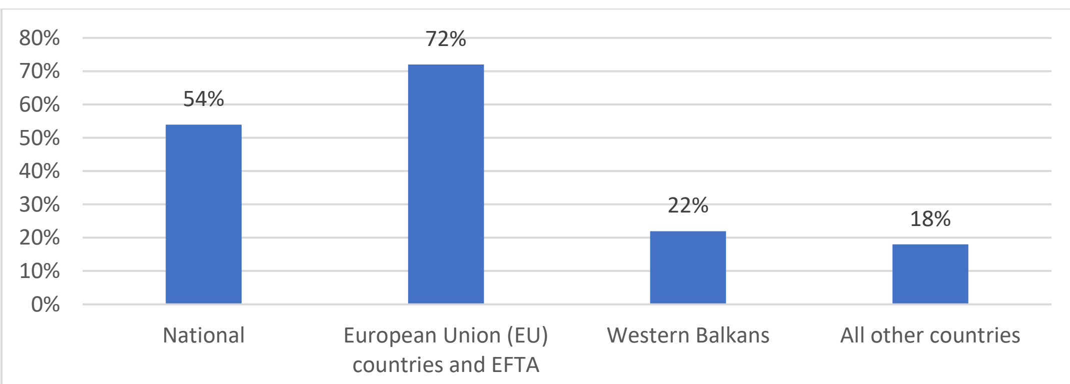


Figure 3. Selected companies, by total number of employees in 2019



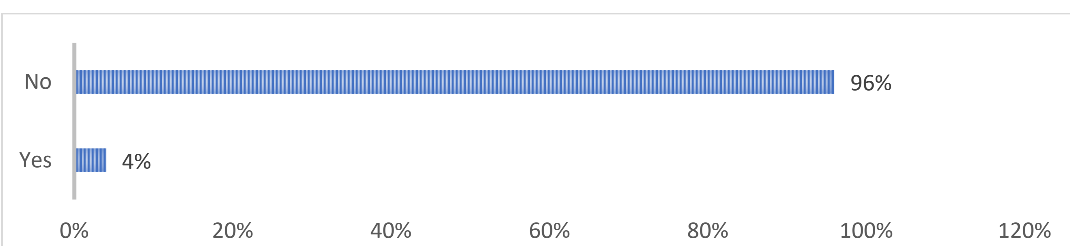
In terms of geography of companies' markets during the last three years, the EU market has been the most important market for the selected companies, with a share of 72%, followed by the domestic market (54%), and the region (22%) (see figure 4).

Figure 4. Geography of company market



As figure 5 shows, only 4% of businesses involved in the questionnaire are part of a group, holding, or franchise, reflecting a sample of companies with a high incidence of local ownership.

Figure 5. Is your company part of a franchise/group?

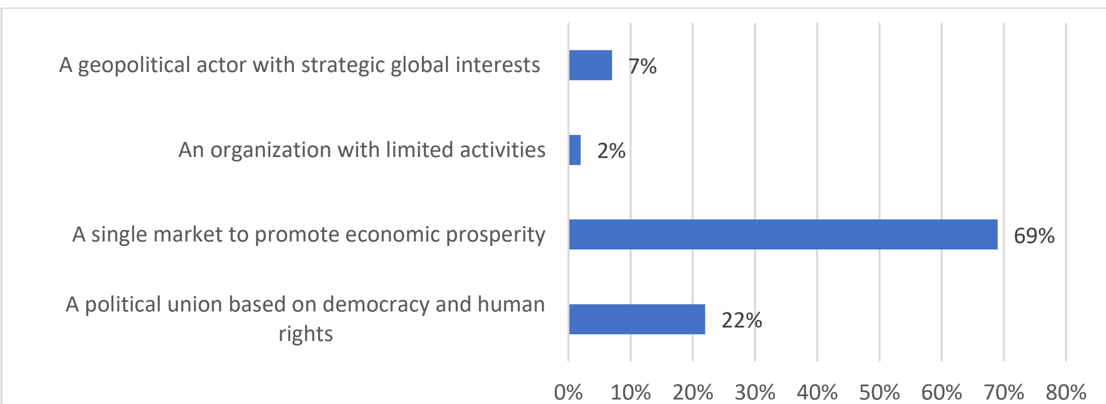


2. General information on the EU

In this first section of the report, an overview of main components regarding the European Union was at the focus of the questions. The aim was to try to understand and capture general knowledge, level of information, and potential misconceptions regarding the overall institutional framework and functioning of the EU.

When asked regarding the EU as an entity and what is its main purpose of existence, an overwhelming majority of respondents (69%) see the Union mostly as a single market, therefore, with the economy as its backbone (figure 6). A second group of around 22% considers the EU as a political entity where most important elements concern the political criteria, such as democracy and protection of human rights. A small portion of businesses attributes to the EU an objective related to a more global actor role (7%). Based on the answers by sector and business size, there is no important pattern to be observed, except the industrial and telecommunication sectors where the portion of those choosing "a single market" as an answer was higher than the other areas (88% and 91% respectively).

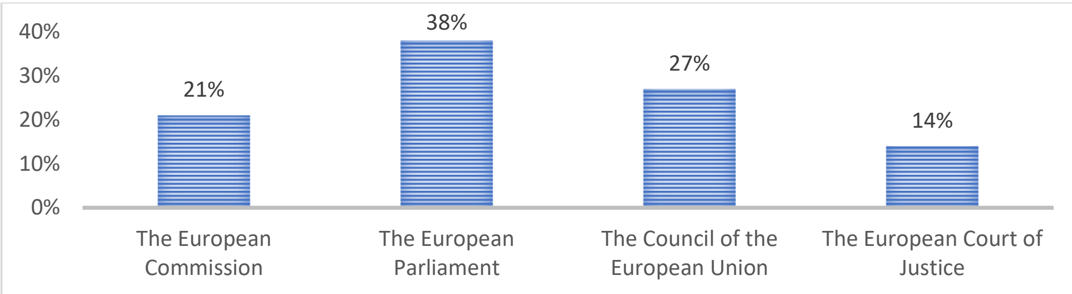
Figure 6. What does the EU mostly represent for you?



The European Union includes a variety of institutions, combining supranational ones, with those where direct participation and representation of interests of member states is at the core. In this regard, business representatives were asked about their familiarity with the main EU institutions, as figure 7 shows. In spite of the fact that the European Commission is the main contact point for accession countries in terms of monitoring of fulfilment of criteria, funding, etc., it appears that respondents recognize more the European Parliament (38%).

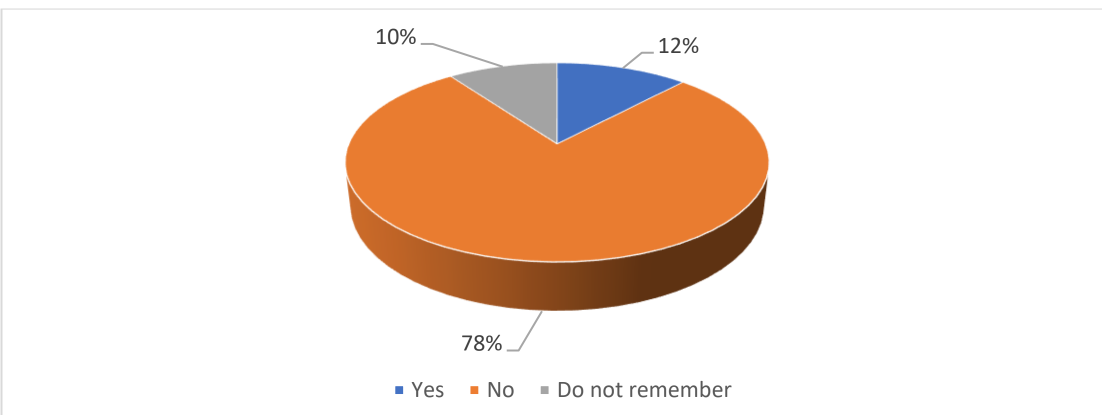
Rather than a genuine knowledge of the European Parliament, this answer might be also due to the fact that the other institutions' denominations are more unique, and not present in each state domestic institutional framework (differently from a parliament). The European Commission is selected as an answer mostly from big companies and the ones in the industrial and fason sectors. Meanwhile, the European Parliament is most popular among tourism companies and construction sector.

Figure 7. Which EU institution are you most familiar with?



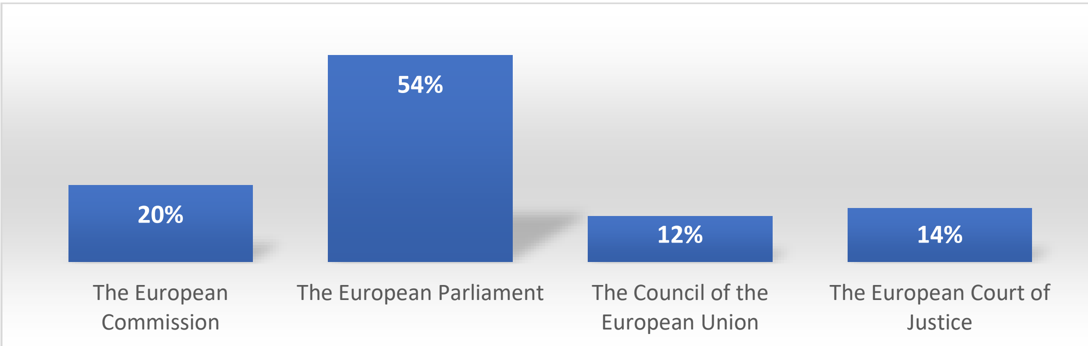
In order to observe the level of information and relation that companies have with the EU, businesses were asked whether they have had any direct contact with EU representatives, in any circumstances (figure 8). The EU has its own representation in Albania (the EU delegation), which is quite active with public activities and outreach. However, a majority of companies do not seem to have had any encounter with EU officials (78%). Only 12% declare to have had the experience. Those with less contact belong to fason sector and wholesale businesses. There is a pattern based on company size (turnover and number of employees), since, as expected, bigger companies are the ones to have had more encounters with EU representatives.

Figure 8. Have you ever been in contact with any EU institution or representative?



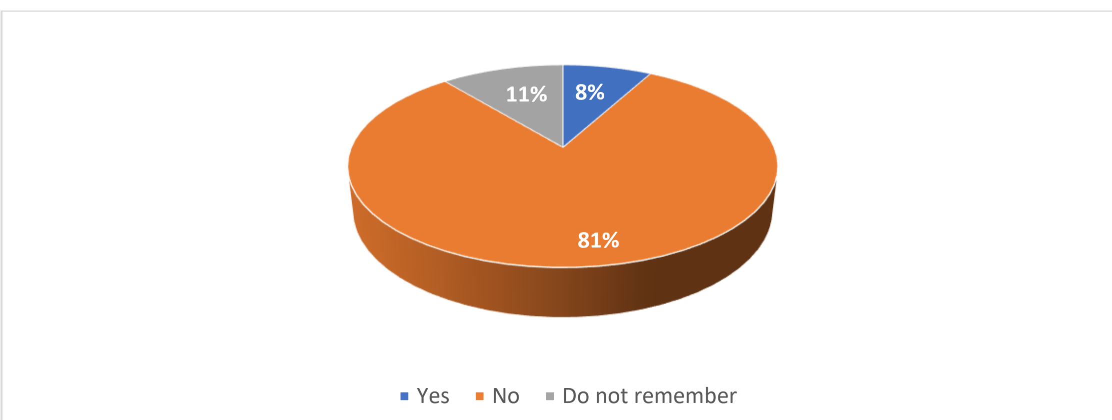
Continuing on the EU institutions' theme, we tried to explore respondents' understanding and perceptions on the functioning of the EU and the role of its main structures in terms of decision-making power. By confirming the findings of figure 7, the European Parliament has been placed again at the top of choices reaching at 54%, followed by the European Commission (20%) and the European Courts (14%). At the bottom of the decision-making power entities in the EU according to businesses, we find the Council of the European Union (member states) with 12%, which in reality enjoys full decision-making power. In relation to the answers of the question in figure 9, companies have replied similarly across sectors or company sizes. It appears there is a general lack of information regarding the policy and decision-making framework within the EU, and the role of its institutions (figure 9).

Figure 9. Which institution has the biggest decision-making power in the EU?



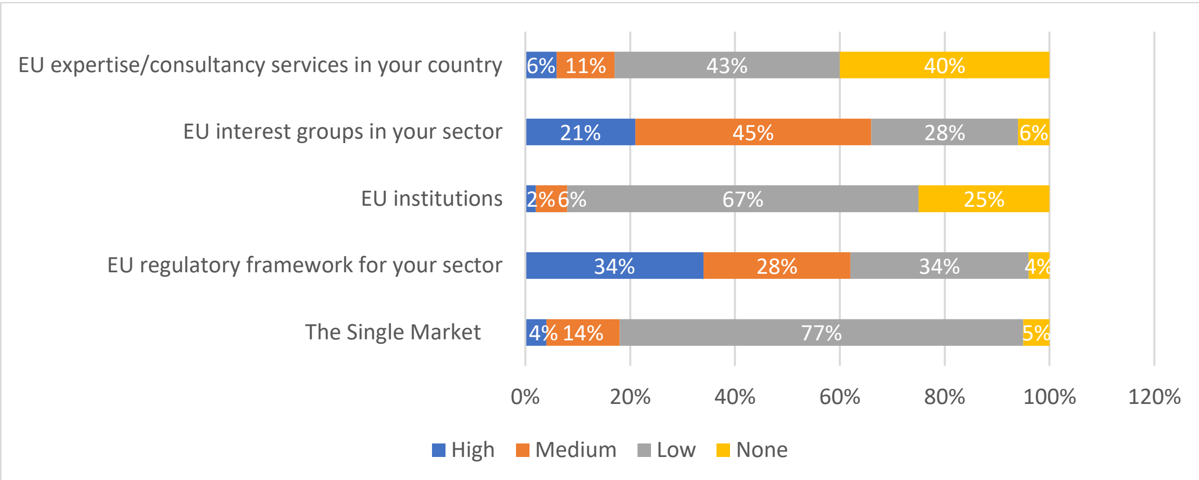
An important element for the business community integration in the EU market is their representation at EU level. Although only companies from member states are represented by these groups, we tried to understand whether Albanian businesses have already had any contact with EU interest groups and sector representatives. As figure 10 shows, only 8% claim to have been in touch with such entities, while the vast majority has had no such experience so far. Among the 8% who have had contact with EU interest groups, we find big companies and particularly in the areas of telecommunication, industrial services, and tourism.

Figure 10. Have you ever had contact with any EU interest group (business association) in your sector?



What was showed in the previous graphs in relation to knowledge of EU institutions is confirmed also in figure 11, where the companies that replied to the questions appear to have limited knowledge, especially on EU institutions and the EU single market. The level of information improves slightly in respect to EU interest groups and EU regulations for their own sector. However, a vast majority claims to have low or no knowledge on the overall institutional framework. The lack of knowledge on the single market is spread across sectors, but, however, representing higher numbers in smaller and medium companies. Telecommunication and industrial production sectors appear to have slightly better levels of information overall than the other sector.

Figure 11. Rate your general knowledge regarding the following:



3. The Enlargement policy and process

As mentioned previously in the introduction, Albania is pursuing its strategic priority of EU membership, committing its institutional and political assets. However, the process has been long and there is no clear perspective on possible timing regarding accession. In spite of the stagnation of the formal steps of the process, popularity and support of EU accession among Albanian citizens is still very high reaching at 84%[3] according to the Balkan Barometer 2021.

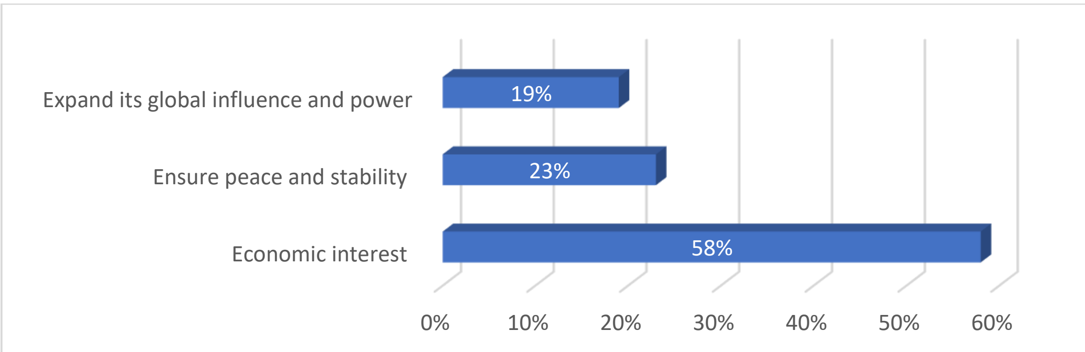
However, it is important to understand the level of knowledge and information that companies have regarding Enlargement policy, the Albanian path towards membership, and main challenges and expectations. Considering the low level of information of the general public on the process, companies might reflect same patterns and knowledge gaps.

As a starting point for this section, we tried to understand businesses perception of EU interest in the Balkan region. As displayed in figure 12, most of business representatives (58%) attribute to economy the main reason of EU engagement in the region. The rest of the respondents think that the EU is present mainly for ensuring peace and stability (12%) or for strengthening its global power (19%).

[3] Regional Cooperation Council (2021), Balkan Public Opinion Barometer. https://www.rcc.int/balkanbarometer/results/2/public

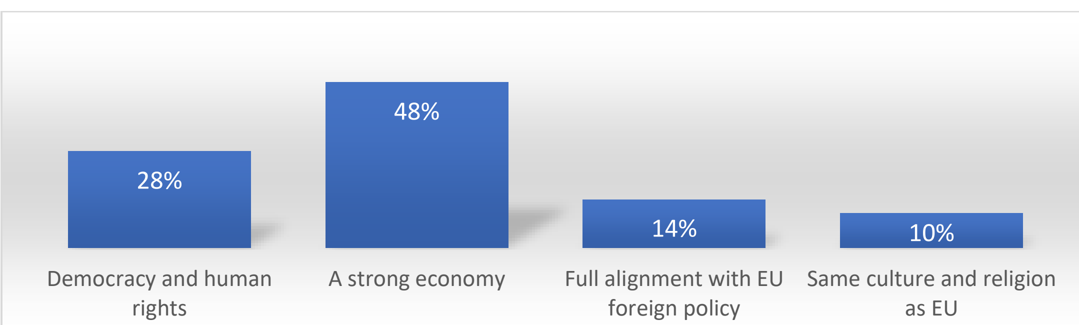
Businesses that have chosen economy as a main interest are mostly in industrial production, fason industry, and construction. In general, representatives of big companies are in a larger portion for claiming that EU is becoming a global actor and is trying to expand its influence.

Figure 12. What is the EU interest in the Balkan region?



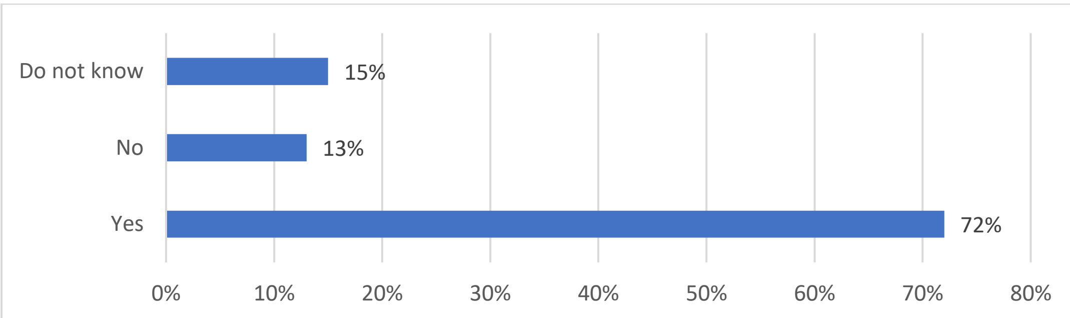
When discussing more specifically about EU accession, membership criteria are a key element. Although, based on [the Copenhagen criteria], most part of the offered answers are all the right ones, we used this question in order to understand how respondents view the EU and what is important for the EU. Figure 13 shows that economy is again the main component valued by businesses as a criteria for EU membership, with 48% of them. Another 28% considers democracy and human rights as a standard for acceding the union, while 14% have chosen full alignment with EU foreign policy. A small portion of 10% has focused on common culture and religion. Industrial and fason sector are the ones focusing more on the importance of economy as a criteria (with 64% and 57%), while tourism and wholesale are the ones choosing most democracy and human rights.

Figure 13. What are the main criteria for EU membership?



The EU accession process is quite complex and it implies several stages. One of them is the candidate status, which has been applied to the Western Balkans and Turkey. As mentioned before, Albania achieved candidate status on June 2014. We asked businesses whether they had this information, in order to understand their level of information on the current status of the country in this process. As figure 14 shows, there is satisfactory majority that has the correct information (72%), responding that Albania is indeed a candidate country. Only 13% have selected the wrong answer, and 15% do not have this information or are not sure.

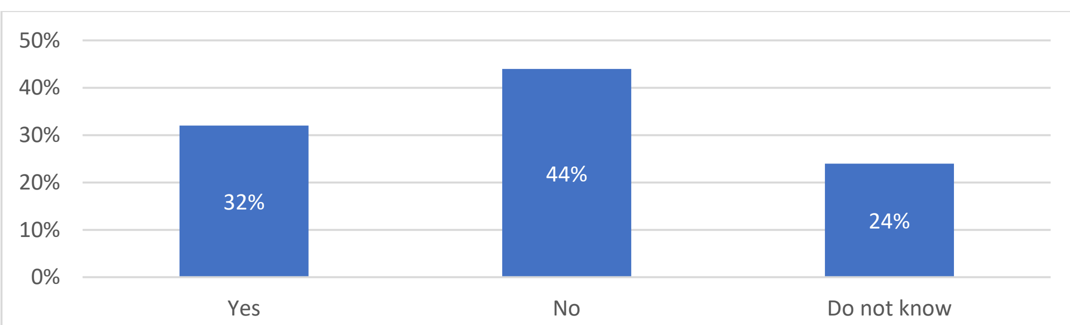
Figure 14. Is Albania a candidate country for membership?



Following the same approach, businesses were asked on a more current state of affairs, the accession negotiations. The topic has been present on the media and in political debates often, especially in the last three years. However, there has been conflicting information and confusion regarding the actual stages, and, therefore, we tried to capture business understanding on this (figure 15).

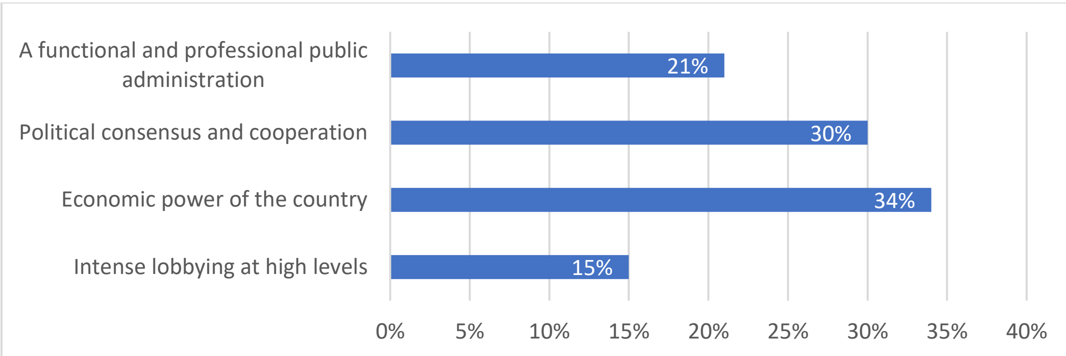
One third of businesses think that Albania has started membership negotiations with the EU, while less than half (44%) select the right answer. In addition, there is a considerable portion of companies (24%) that do not have this information. This pattern is observed across all sectors, while big companies have a slight margin of being better informed.

Figure 15. Has Albania started accession negotiations for EU membership?



In trying to capture what businesses expect negotiations' process to be and what are its main challenges, we asked what they consider as the most important capacity required to succeeding in this process. Figure 16 shows that economy is once again considered a key component, even in the negotiations process, with 34% of responses. Political commitment and an efficient public administration are the following choices, with 30% and 21%, respectively. Less importance is given to lobbying, with only 15% of respondents.

Figure 16. What is required most for a successful negotiation process with the EU?



Although in previous questions economy has been at the center of the respondents' answers, when asked what businesses see as main obstacle for Albania, weak law enforcement and political culture are place before economy, reaching at 34% and 32% each, respectively. Economy remains right after at third place with 30%. It is interesting to see that a very small portion of respondents consider a potential discrimination against Albania (from the EU) as a main factor (4%), differently from some of the rhetoric in public debate.

Figure 17. What do you think is the main obstacle for Albania in achieving membership?

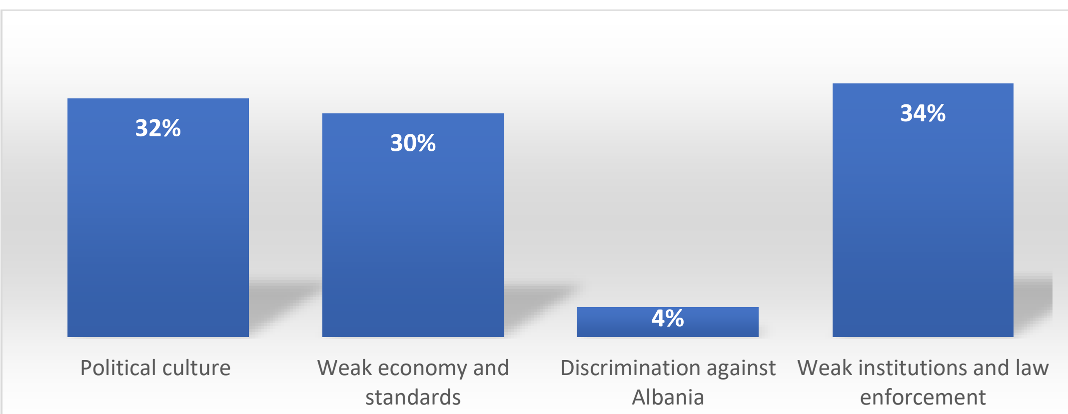
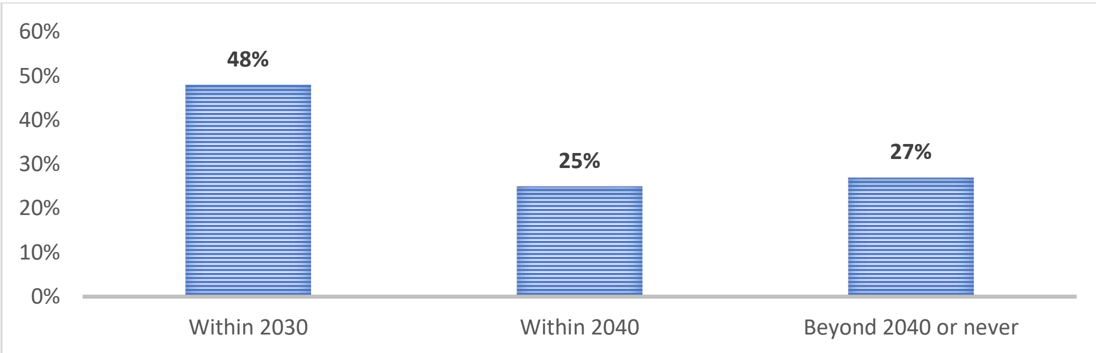


Figure 18 shows expectations business representatives have regarding a timeline for a possible EU membership for Albania. More than a quarter of respondents (27%) think that Albania will not join the EU before 2040 (or will never become a member). Almost half of businesses considers (before) 2030 as the most feasible time for reaching this objective, while the remaining quarter think that the country might be ready within 2040. The most 'pessimistic' sector appears to be the fason sector (with

43% replying 'beyond 2040 or never'), while the most 'optimistic' are tourism and telecommunication sectors with a majority claiming that Albania will join within 2030 (71% and 68% respectively).

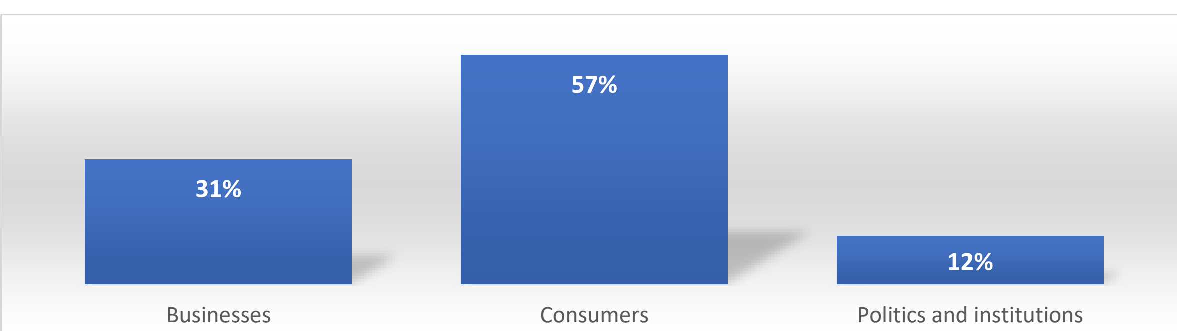
Figure 18. When do you expect Albania to become EU member?



4. Expectations on costs and benefits of EU membership

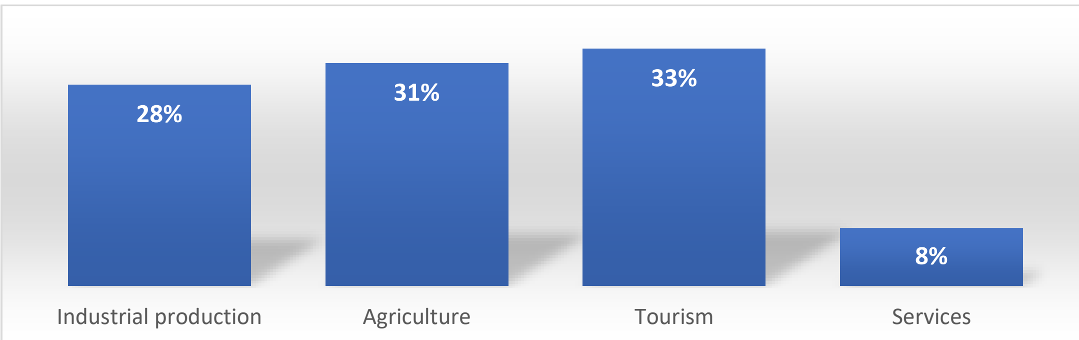
The European integration process implies the adoption of the EU legislation and standards, implementing them effectively by the accession country. In this regard, a variety of costs and benefits are associated with membership. Having extensive and correct information on these aspects is an important part of preparing for the process and membership itself. In particular, for businesses it is crucial to understand what their sector (and company) might go through in terms of challenges, but also on opportunities. This section explores levels of knowledge and information that Albanian business representatives have regarding the above. In figure 19, we asked businesses who they think would benefit mostly from the EU membership in Albanian society. A majority of 57% believe that consumers would be the main beneficiary. Almost a third of respondents answer that actually businesses would benefit most, while the remaining 12% consider Albanian institutions as the most important area where EU membership will show its results. Tourism companies are the ones seeing membership as most beneficial for them (47% of them), while wholesale and fason companies seem to favour consumers.

Figure 19. Who do you think would benefit most from EU membership?



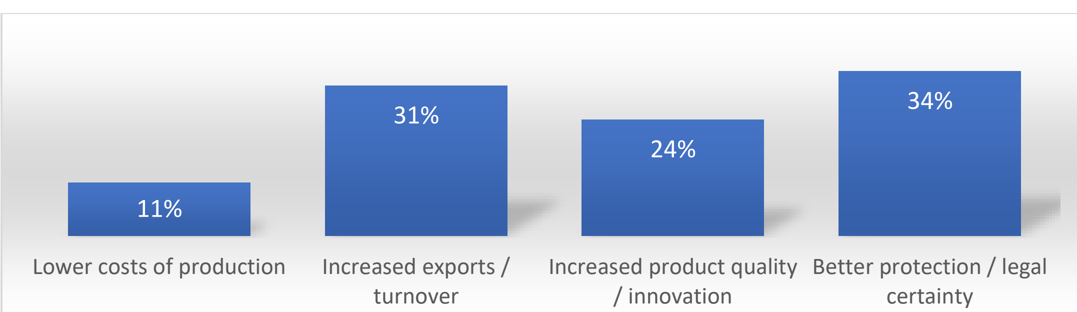
Tourism seems to be perceived as the one sector benefiting more even when asked which would be the sector benefiting most. Around 33% of all questioned companies have chosen this sector. Interestingly, agriculture has been placed second with 31%. With a few follow-up questions on some of the respondents that chose agriculture, we tried to dig further on this point to explore the reasons. As a result, their answers implied that agriculture sector would receive consistent EU funding, since they were aware that this sector receives subventions from the EU. Another 28% of companies claim that industrial production would be the main sector benefiting from membership.

Figure 20. Which business sector would benefit most from EU membership?



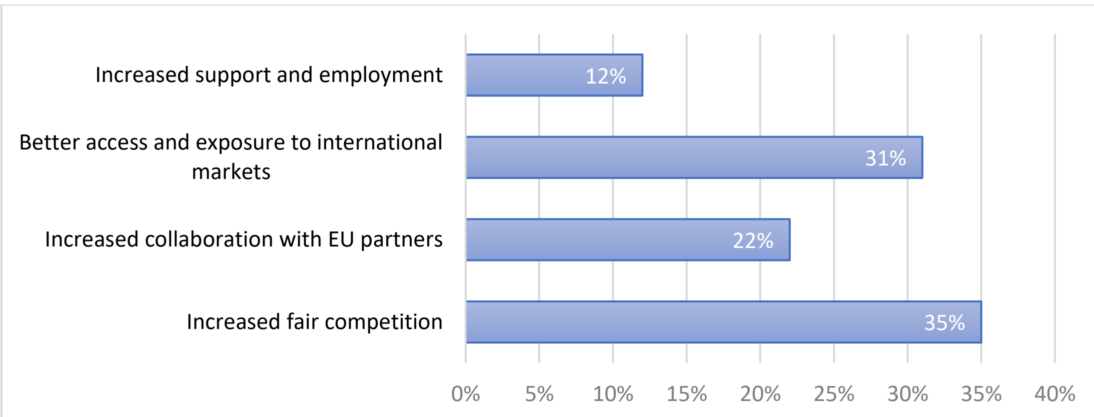
When asked specifically about their own company and its expected benefits (figure 21), respondents were again divided more equal shares, with 34% choosing legal certainty (which was explained to include law and contracts enforcement). Another considerable part of businesses (31%) turns more into the economic side of benefits, claiming that they expect their company turnover and/or exports to jump, once Albania is an EU member. A quarter of companies expect their production technology and products quality to improve, while 11% percent think that EU membership will lower the cost of production. When explored the answers by sector, we notice a staggering 78% of fason companies claiming that they expect legal/contract certainty to improve with EU membership. 'Increased turnover/exports', as an answer, has been chosen mostly by agriculture and wholesale companies (61% and 52%, respectively).

Figure 21. What benefit do you expect your own business to obtain most?



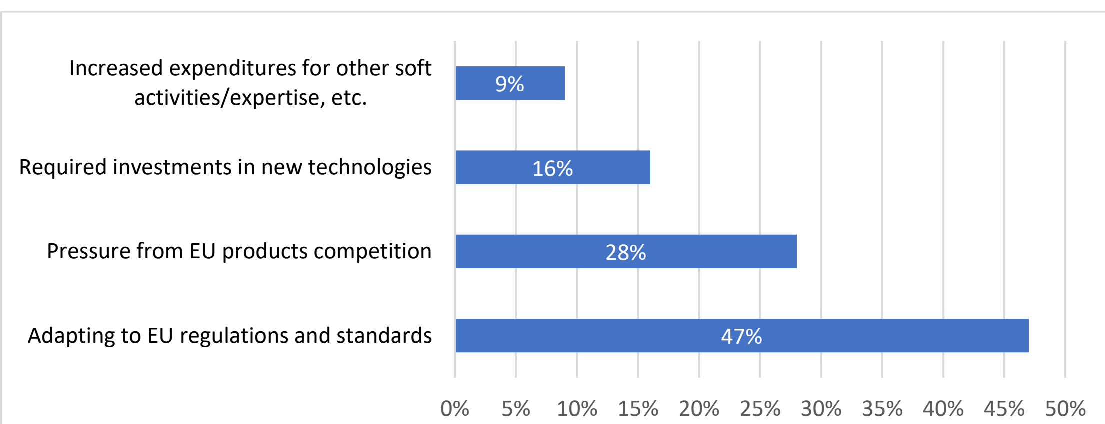
We asked the same question but for benefits for their sector and not just the company, giving as options some other potential benefits (figure 22). More than a third of respondents expect an improvement and increase of fair competition in their sector (35%). Another 31% considers EU membership as a main driver for the access and exposure of their sector to international markets. The remaining shares are more focused on more collaboration and partnerships with EU companies (22%), while only 12% expect their sector to receive support and to increase employment.

Figure 22. What benefit do you expect your sector to obtain most?



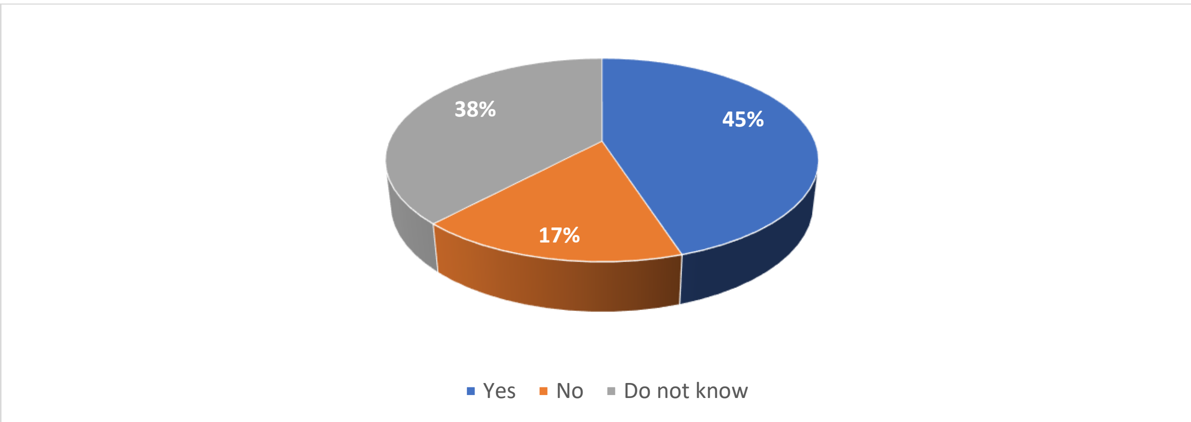
After exploring expectations on benefits, businesses were asked regarding costs of EU membership for their company. Figure 23 summarizes respondents' opinions, where almost half of them (47%) thinks that the main costs will derive from the adaption to EU regulations and standards. A considerable 28% fears competition from EU companies once they are of the single market. While a quarter of companies expects costs for new technologies needed and for other expenditures.

Figure 23. What do you expect to be the main costs for your company with EU membership?



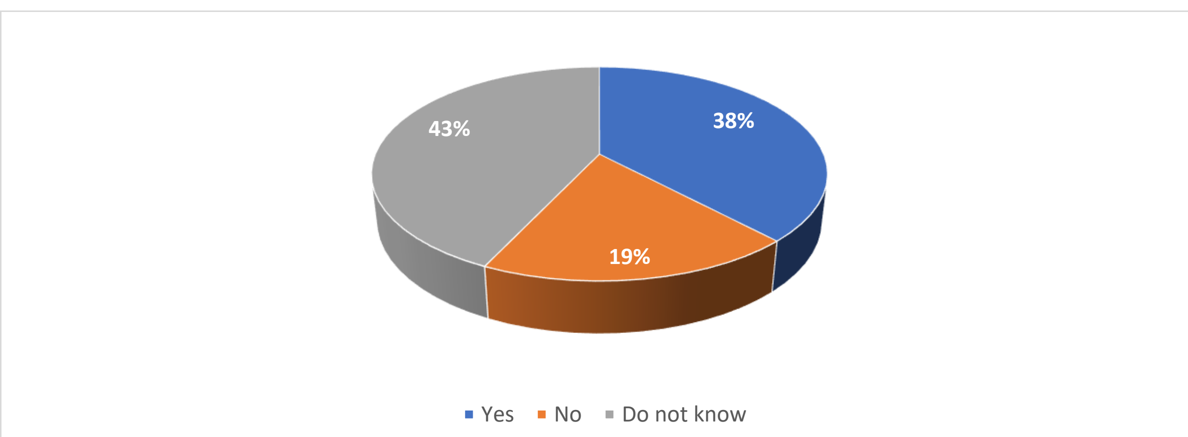
As a follow-up question regarding costs, we asked companies if they think that the costs that they will need to afford will be worth it in the long term, considering the lasting benefits of being part of the EU (figure 24). Surprisingly, a big portion of companies declare to not know the answer to this question (38%). However, 45% of them is certain that benefits in the long term will be superior to costs. An important 17% considers that costs might overcome the benefits. This suggests that they might not be very supportive of EU membership.

Figure 24. Do you think long-term benefits would justify costs of membership, for your company?



About 38% of business representatives appear to be prepared for affording EU membership costs without any relevant support (figure 25). While 19% are certain to not be able to cover by themselves what they perceive would be the costs. The biggest share of companies, however, declare to not know at the moment whether they will be able to provide for potential costs that EU membership might imply.

Figure 25. Will you be able to afford costs that membership might require, without support?



5. Information patterns and channels

The level of information of knowledge among companies depends mainly on the patterns and instruments with which they acquire information. This determines often the quality and quantity of knowledge they have regarding the EU integration process and membership. In this section, the questionnaire explores how Albanian businesses get informed for these elements, which channels they use, and what are the possible gaps. In figure 26, businesses are asked regarding the frequency of receiving information concerning EU integration. A large portion of companies declare that they have contact or information once a year or less (47%). Only 3% declare that they receive very often information (once a month), while 29% have information many times per year.

Figure 26. How often do you receive information regarding EU integration processes?

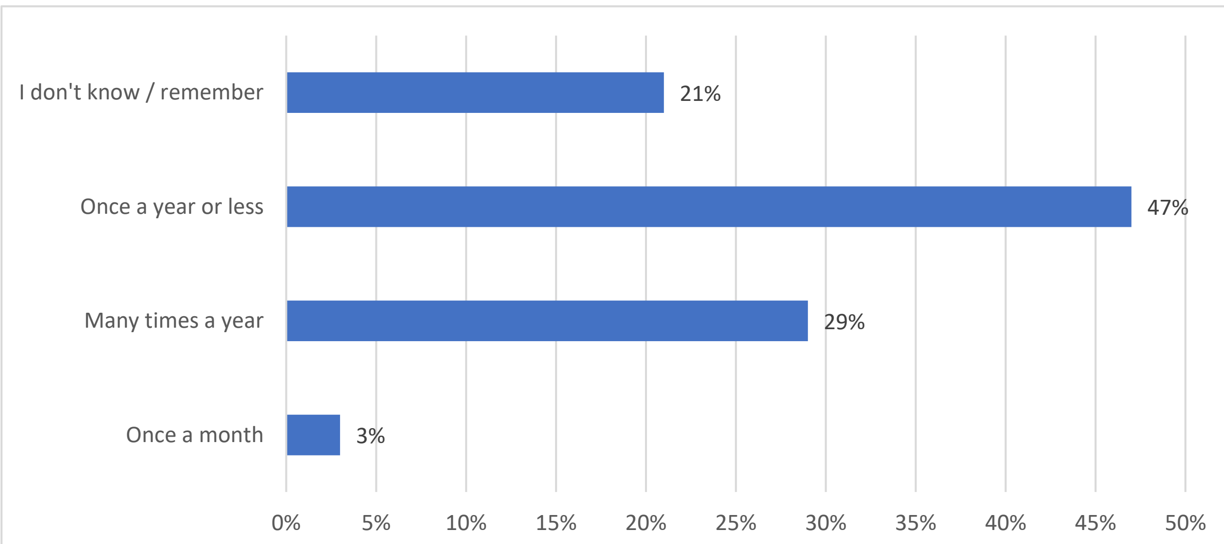
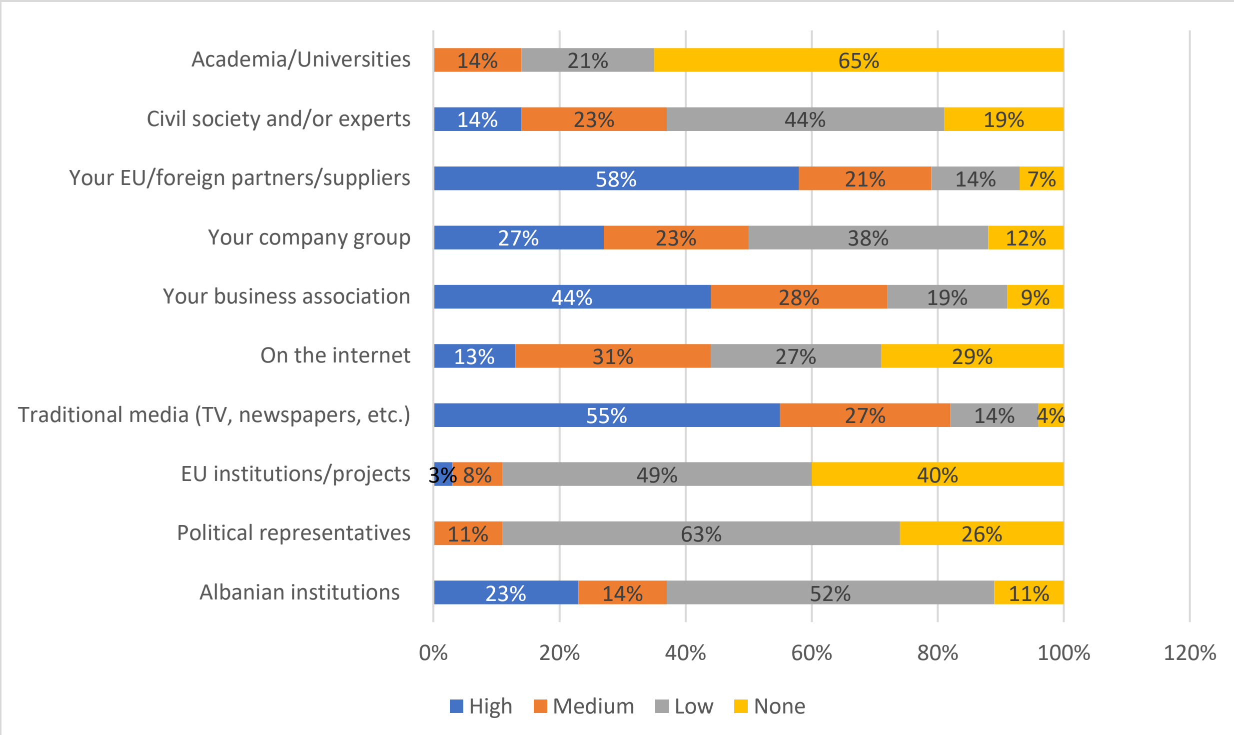


Figure 27 tries to explore the information channels used by companies and their relevance. By a large majority, business representatives consider politicians and universities as the less useful sources for periodical information on EU integration (with 89% and 87%, respectively, claiming to have had low or no information from these two channels).

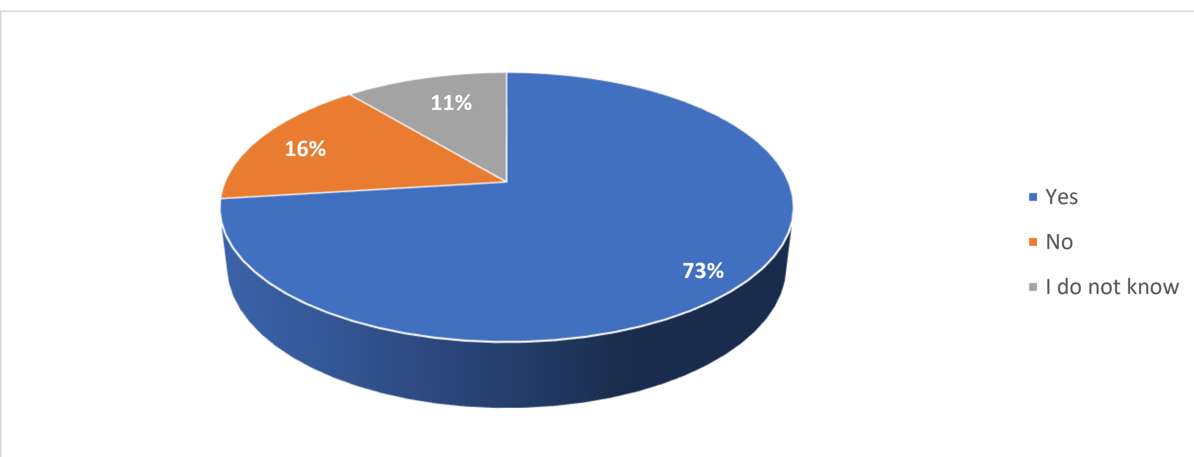
The most important sources of information on EU affairs for companies are EU partners and traditional media, with 58% and 55%, respectively, claiming to consider these two as highly important. It is interesting to notice that 63% also claim to have had low or no information from public institutions. Domestic business associations appear to have a considerable role in informing companies, since 44% declare them as a highly relevant source of information, while 28% also think they have a medium importance.

Figure 27. Rate the importance of these sources of information for you, in relation to EU integration:



An overwhelming majority of businesses think that they should be informed more on the process of European integration (around 73%). As figure 28 shows, only 16% consider the current information to be enough and does not require additional efforts in this direction. Companies from agriculture and industrial sector are keener to receiving new information (87% and 84% respectively), while tourism and telecommunication appear less interested (28% and 27%).

Figure 28. Do you think that business community should be informed more on the process?



When asked on the preferred frequency of having detailed information on developments on EU affairs and their sector, respondents claim that twice a year could be the optimal combination (64%). However, 22% of them think that every three months is best, while 13% prefers having more rare approach in terms of frequency (with once a year or less).

Figure 29 shows that, although companies are interested in receiving information on their sector and EU processes periodically, they prefer having it structured with few times a year.

Figure 29. How often would you prefer receiving detailed information on EU integration?

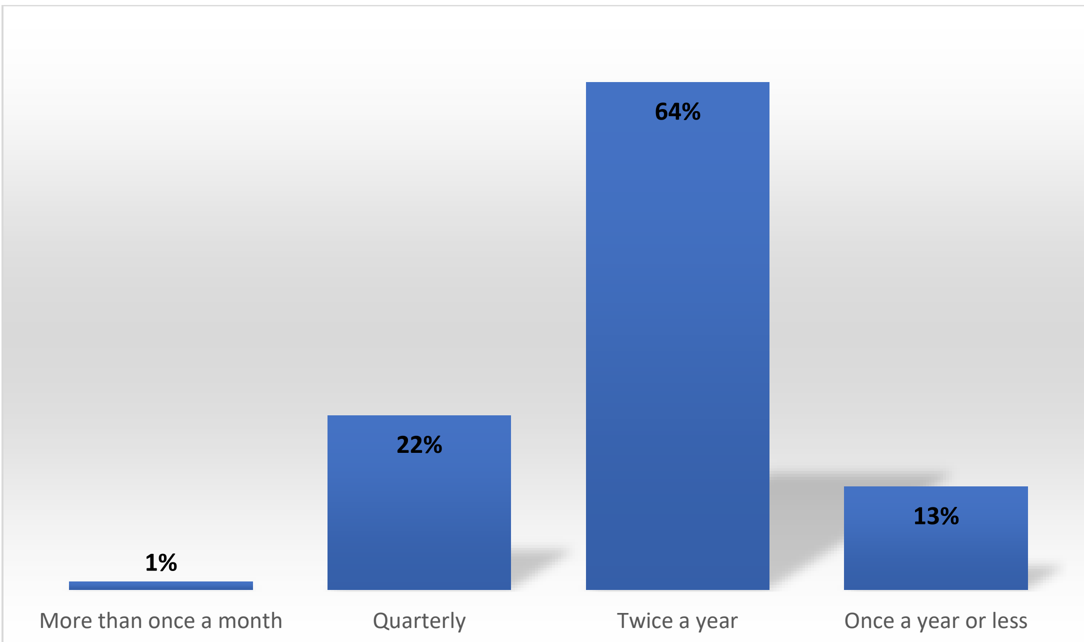
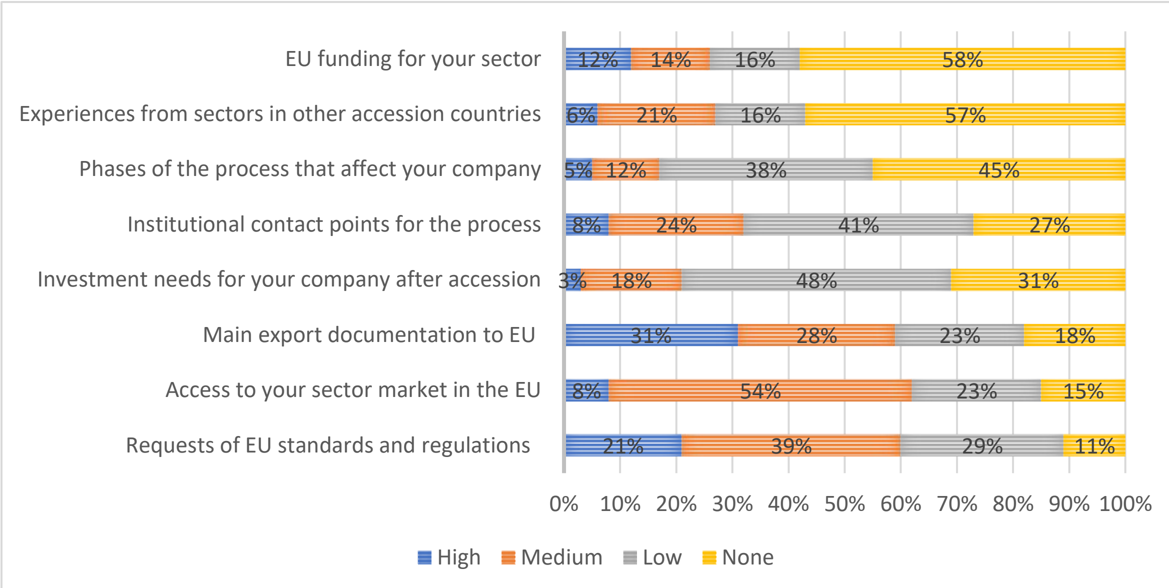


Figure 30 dives more into the center of the main themes that might interest or concern business representatives. We asked them regarding their perception on the level of information that they have for their sector in relation to EU accession implications.

Respondents declare to have no information on EU funding for their sector (58%), followed by practices and experiences from other accession countries (57%). They appear to be better informed on documentation that EU requires for exports where almost 60% of them has high or medium knowledge. Access to their own sector market in the EU has the highest results in terms of medium level of information (54%).

Figure 30. Please rate the level of information that you have for your specific sector, regarding:



6. Perceptions on readiness and needs

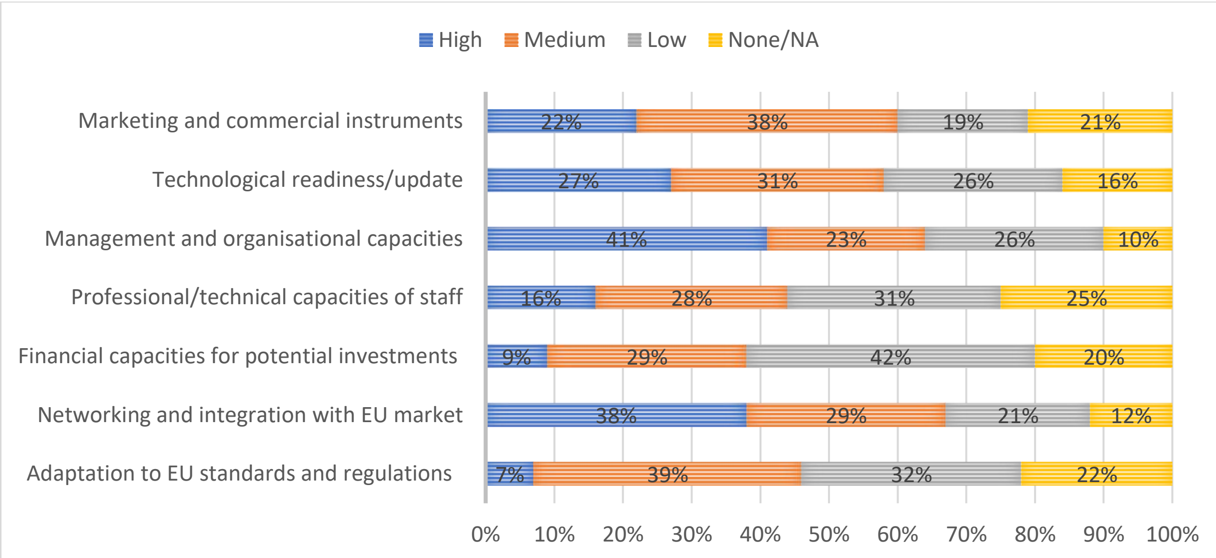
The main objective of the study was to understand more regarding needs, gaps, and readiness of businesses for the process. In this respect, it is important to gather their own views and perceptions on how they see themselves. For this purpose, the following section contains answers of several of the questions posed to explore their opinion regarding perceptions on their stage of preparation.

Figure 31 jumps right into the core of this section, asking business representatives to express their perception on their own company's level of preparation in several areas related to EU accession. The areas with the highest scores in this respect are management and organisational capacities (41%), networking with EU market (38%), and technological readiness (27%).

In terms of medium preparation, adaption to EU standards (39%), marketing (38%), networking (29%) and financial capacities (29%) are the categories chosen by businesses. At the bottom of levels of preparedness, claiming to be in a very low situation (with no preparation or very low), we find financial capacities (62%), professional and technical capacities of staff (56%), adaption to EU regulations and standards (54%).

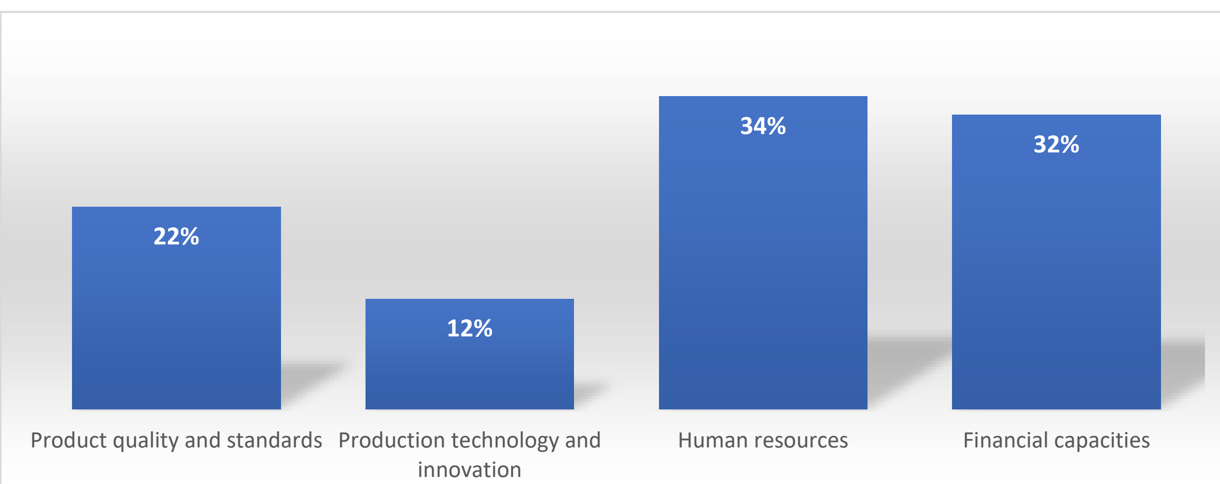
This figure presents a very interesting and diverse picture of the current state of readiness self-declared by businesses. It suggests some companies/sectors are well ahead of others. After cross-analysing data, we found out that telecommunication and digital services, and banking sector are the ones claiming to be better prepared in most of the areas presented below. While at a low scale we find agriculture. In terms of size, as expected, there is a correlation between bigger companies and better preparation levels.

Figure 31. Please rate the level of preparation of your company in the following areas:



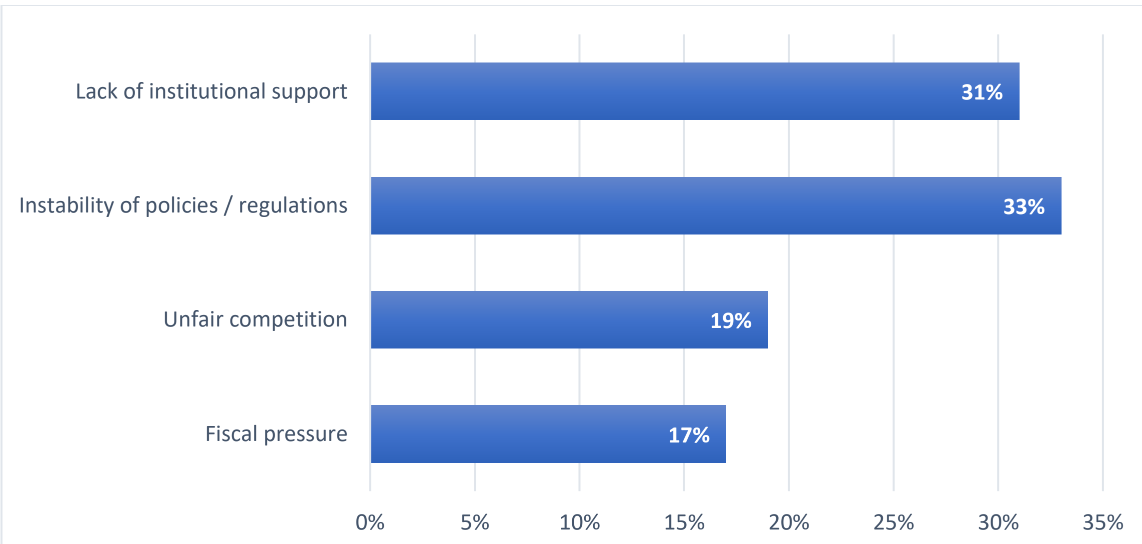
Continuing on this 'introspective' approach, businesses were asked to identify what they consider their main internal obstacle or shortcoming when it comes to preparing for becoming fully part of the single market (figure 32). Interestingly, more than a third of respondents claim that human resources (including technical capacities of staff), represent the main problem (34%). Next to this, we find financial capacities and needs for credit with 32%. Product quality and standards is rated at the third place with 22% of companies selecting it. Businesses in the tourism and fason sector are the ones to choose in majority human resources as a main shortcoming (with 63% and 51%, respectively). Fason industry is also the one with the highest incidence in claiming that financial capacities are a main concern (43%). Products quality and standards is a major problem for sectors such as agriculture and industrial production (44% and 39% respectively).

Figure 32. What would you consider your main shortcoming in preparing for EU single market?



After exploring shortcomings internal to the company, in figure 33 we find businesses answers in regard to shortcomings of the country, which hamper their potential to joining and exploiting fully the benefits of EU markets. In the first place we find instability of domestic policies and regulations related to business activities. A third of companies' representatives have selected this as a main problem for their business. The second problem they identify is lack of institutional support in this process (31%). Other factors mentioned by respondents include unfair competition (19%) and fiscal pressure (17%).

Figure 33. What would you consider country shortcoming that affects your potential for EU markets?

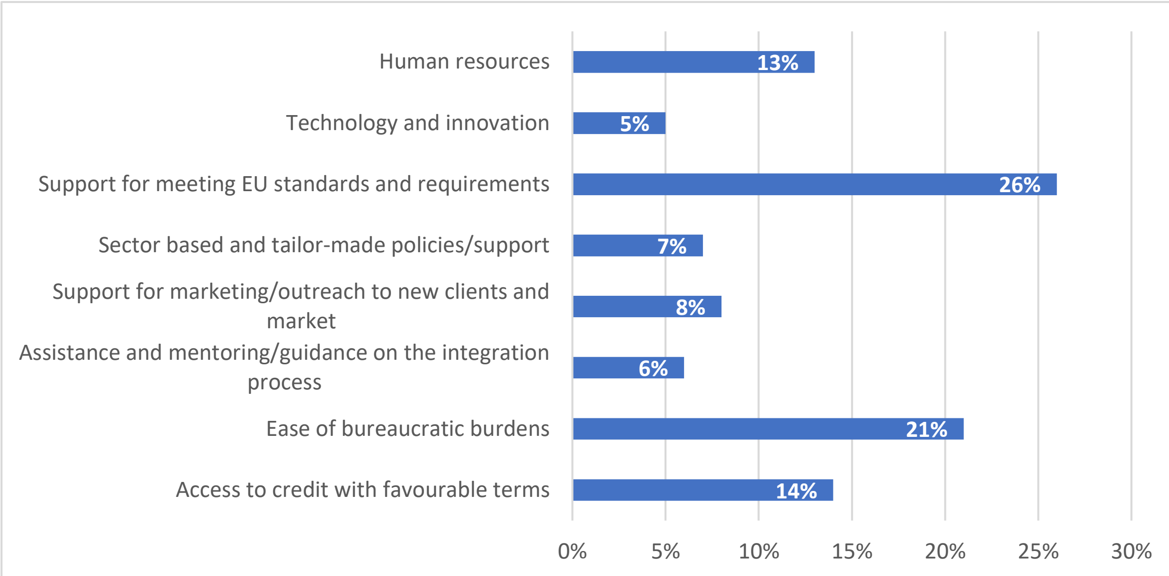


Considering companies' internal and external shortcomings, we asked them in which area they would need more direct support, in order to be prepared better for EU market (figure 34). More than a quarter of companies have selected assistance for meeting EU standards and requirements (26%), while at the second place they require release and ease from bureaucratic burdens from state authorities (21%).

Confirming earlier findings, financial capacities are an important element placed at the third place, with 14% of businesses asking for access to credit with favourable terms. At the fourth place, although considered a major obstacle as figure 32 showed, we find human resources with 13%.

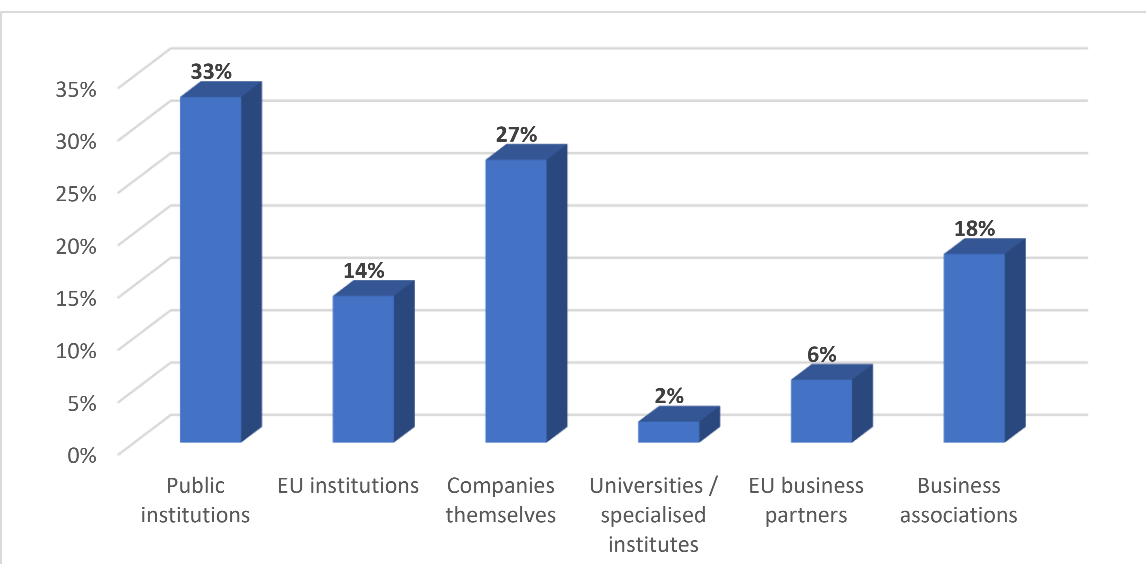
Both main factors (meeting EU standards and ease from bureaucratic burden) are selected most from agriculture and industrial production companies. While tourism and fason remain the sectors with more concern on human resources and financial capacities.

Figure 34. What kind of support would work best for your company to prepare for EU market?



After identifying themselves the areas where their companies need support, we asked businesses who should provide for overcoming these obstacles, in their opinion. Figure 35 shows that expectations are higher from public institutions, with a third of companies expecting their support. A second group claims that it should be companies themselves to invest more in overcoming obstacles (27%). Business associations appear to be expected to have an important role in helping their members to overcome their shortcomings in the EU accession path. Around 18% of respondents have chosen their association. EU institutions are also one of the choices which has been selected by 14% of companies, expecting them to directly support businesses through funding and technical assistance and expertise.

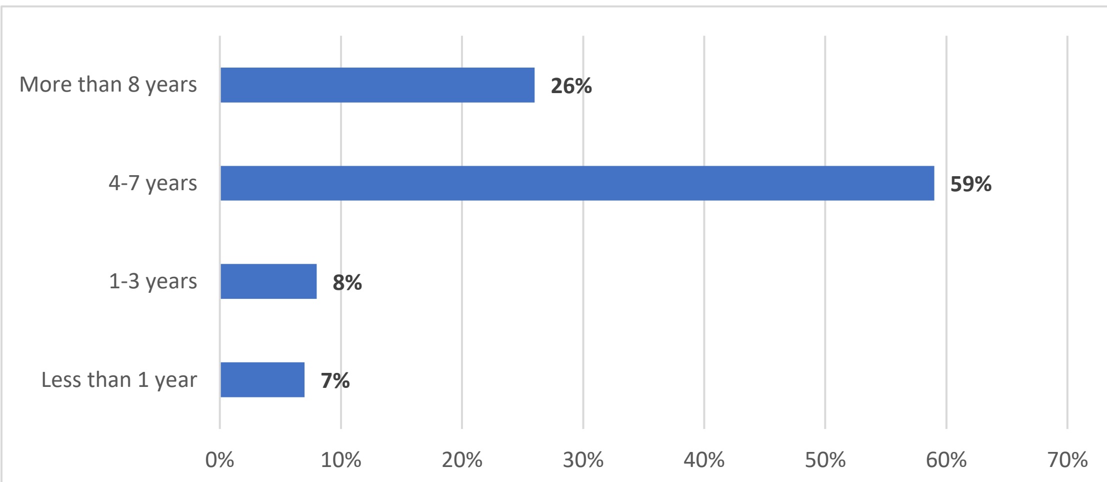
Figure 35. Who do you think should have the major role in preparing companies for EU accession?



In figure 36, businesses were asked regarding a potential timeline for their preparation towards EU membership. A vast majority of respondents (59%) believes that 4-7 years is the appropriate time for getting their company ready for the EU single market. More than a quarter of companies are more concerned and fear that they might need more than 8 years to be ready for competing fully in the EU market (26%).

However, there is a small portion that believes that their business is almost ready for accession, if given 1-3 years (8%) or even less than one year (7%). Companies with most of the confidence come from telecommunication and digital services, and tourism sectors. While businesses that require more time fall under the agriculture sector.

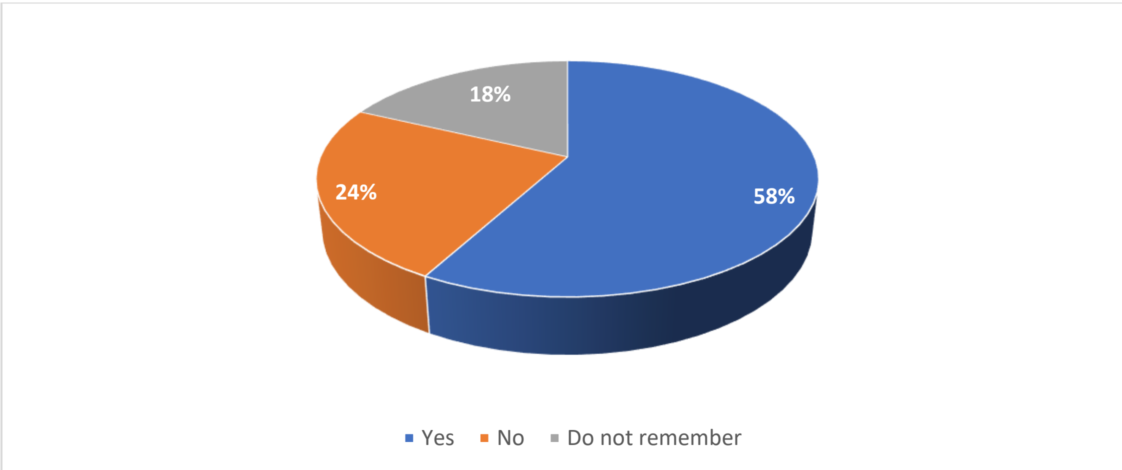
Figure 36. How much time do you think it would take you to be fully prepared for EU market?



7. On knowledge transfer

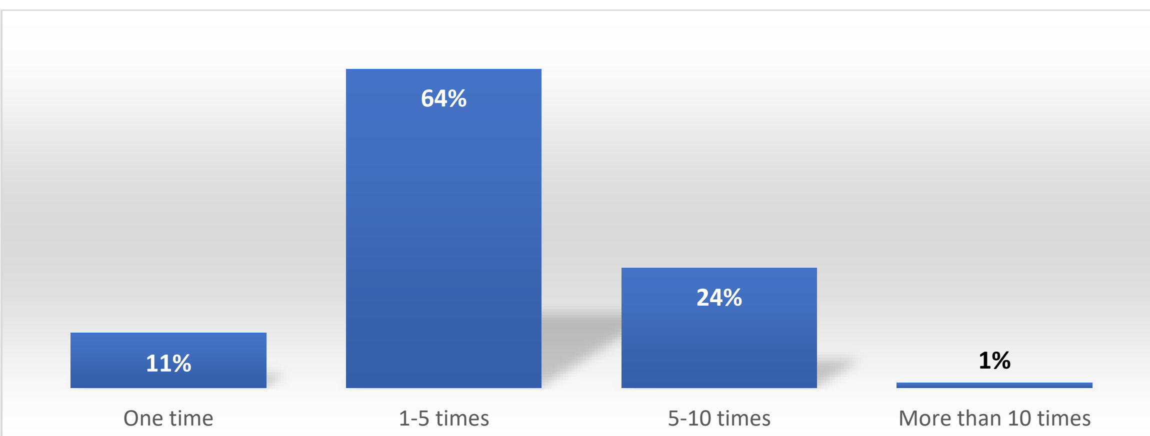
In this last section, we have focused more on the capacity building and knowledge transfer among companies, their experiences and needs in this area. As explained in previous sections, businesses require knowledge and information in several areas. However, it is necessary to explore their perceptions and preferences on how to acquire knowledge and new information on this process. For this purpose, below you will find detailed and analysed answers to a set of questions which explore their opinions on how to receive capacity building assistance. Training sessions have been one of the most used method for informing companies on EU accession and other related processes. At the current state of affairs, more than half of respondents claim to have participated in such activities in the near past (58%). However, almost a quarter of them have never had any training in this regard while another 18% do not remember if they ever had this experience, as figure 37 shows.

Figure 37. Have you and/or your staff ever had training on EU related affairs in the past?



In figure 38, we asked businesses on the quantity of sessions on EU affairs, they have participated in throughout the last years. Almost two thirds of companies have received these training activities for a range of 1-5 times (64%), while another quarter of them has been more active and has participated 5-10 times (24%). Around 11% of companies remember of only one delivered training session, while a very small minority (1%) have participated to more than 10 activities.

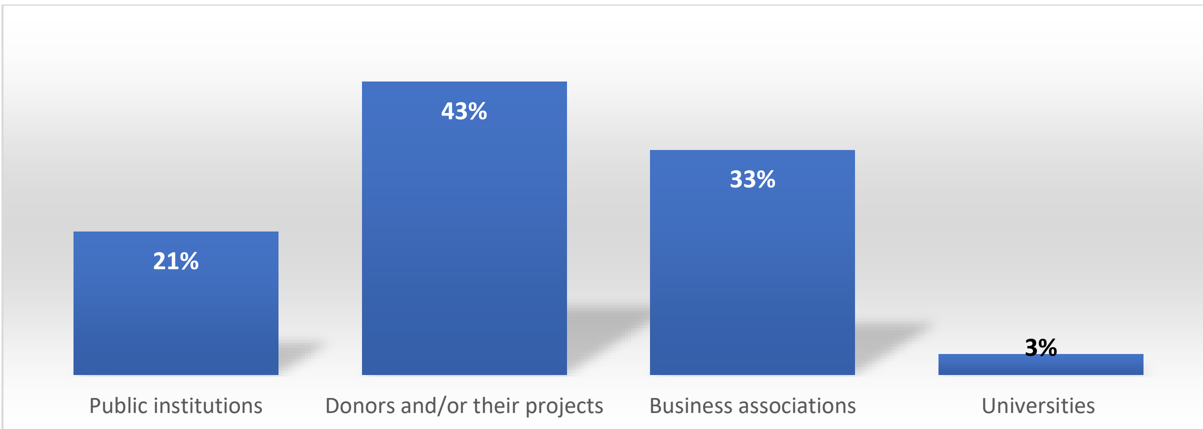
Figure 38. How many times have you participated in such informative activities?



We tried to understand more about these capacity building sessions, and, therefore, we asked businesses to provide reference on who organised and delivered these activities. As figure 39 shows, the biggest part of sessions has been undertaken by foreign donors and/or projects financed by them (43%). This confirms a strong presence of international community in trying to provide technical assistance and informative programs for different groups of society, including businesses.

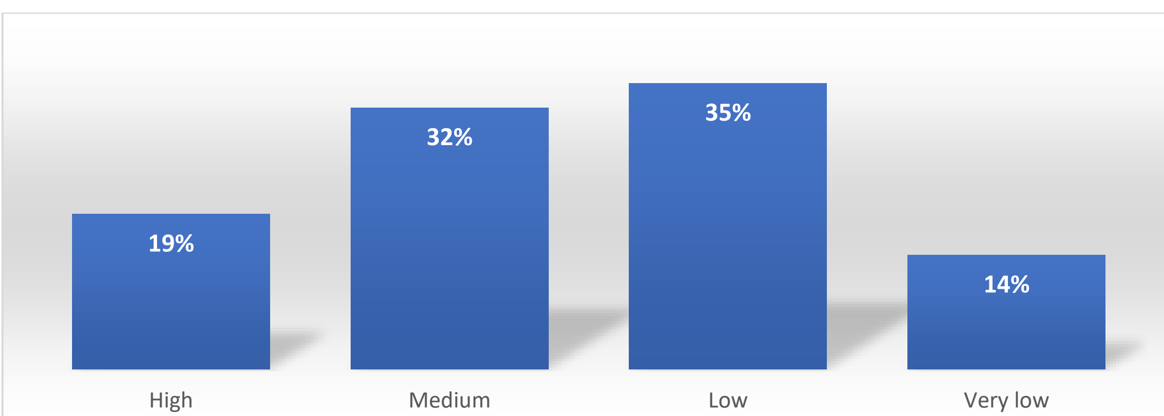
An important second group claims that their business associations have also been very active in providing information and training to their members, with about 33% selecting this option. Public institutions count for only 21% on this role, while universities appear to be very passive in their interaction with business community in the area of EU integration and membership (with only 3% of respondents stating that they have received training from them).

Figure 39. Who undertook the training sessions you were part of?



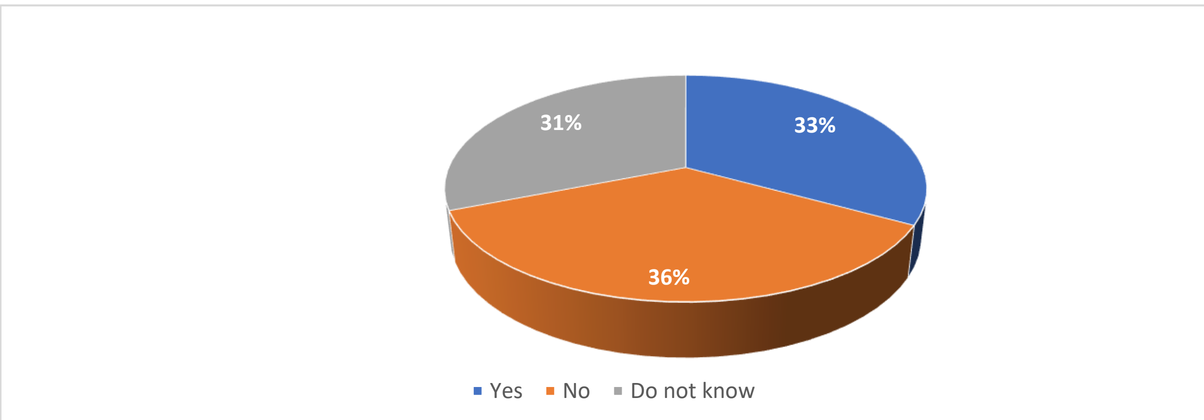
In order to understand more in relation to these experiences, we asked companies how they would consider the activities where they participated, in terms of utility and effectiveness for increasing their knowledge on the topic. As figure 40 shows, respondents have been quite split in their answers, having experienced different patterns. However, it is important to notice that almost half of businesses consider to have benefited from these activities at very low level (14%) or at low level (35%), for a total of 49%. Medium usefulness count for 32% while high level of profit from training sessions reached at 19% of respondents. This suggests that there is a vast variety of types of capacity building activities regarding EU integration, which differ in terms of quality, effectiveness, and usefulness for the selected audience.

Figure 40. How would you rate the usefulness of these meetings for your economic activity?



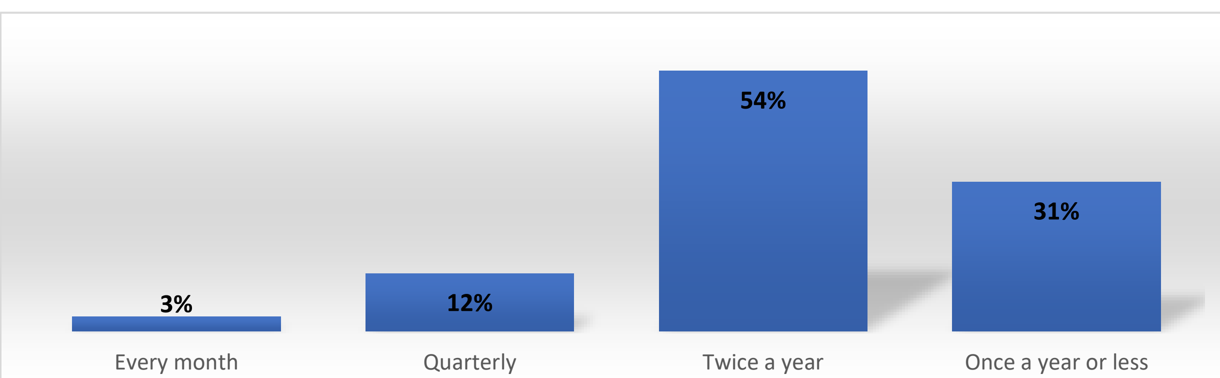
Drawing from the previous figure results, we asked companies whether they would consider training as a future method for acquiring information, knowledge and capacities regarding the EU membership and the accession process. Figure 41 brings another split in their opinions without any answer representing a sound majority. Around 36% of businesses do not opt for this type of activity considering it not very useful and efficient for their company, since it is being perceived as time consuming as well. On the other hand, a third of companies (33%) fully support these activities and are willing to participate. It is important to notice also that almost another third (31%) are not sure on this and do not know whether they would be willing to participate.

Figure 41. Would you and/or your staff be willing to participate in training sessions in the future?



For the 33% that is fully convinced to participate in capacity building activities, we asked how often they would prefer to be part of these sessions, in order to be beneficial for them and not time consuming. As figure 42 shows, more than half of businesses considers twice a year as an optimal timeframe for receiving this type of assistance (54%). Almost one third of respondents, however, would prefer to participate once a year or less (31%). A small group is keener of participating in these activities four times a year (12%) or every month (3%).

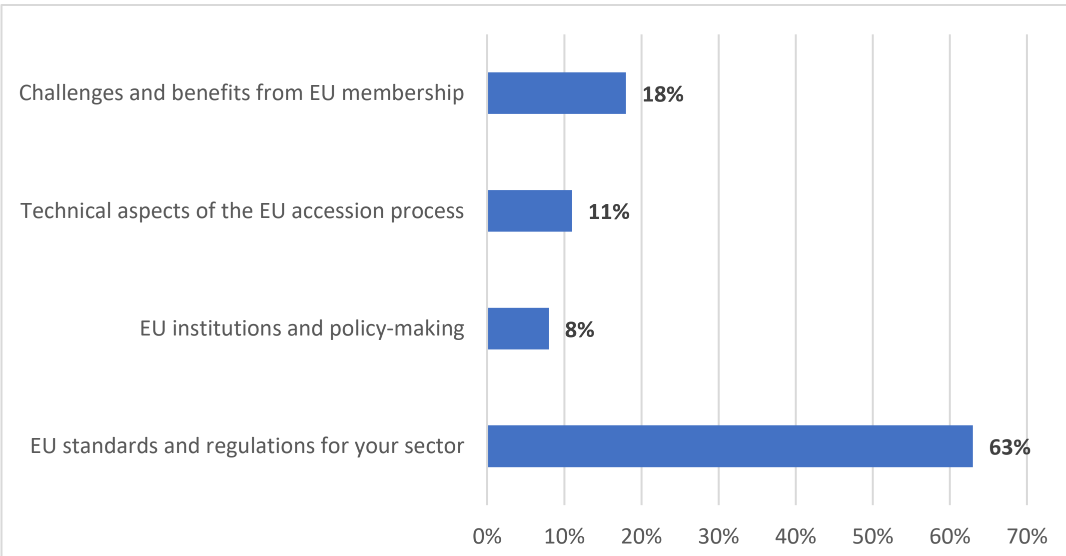
Figure 42. How often would you prefer being part of these activities?



In relation to the content of training and capacity building activities, companies were asked regarding the topics that they would want to be covered most. Figure 43 shows that by an overwhelming majority of 63% of businesses, EU standards and regulations for the sector is the most preferred area. This is followed by a more general approach, focused explanation of challenges and benefits that EU membership will bring (18%).

A smaller group of 11% have expressed interest in understanding more about technical aspects of the accession negotiations process, while only 8% are willing to learn about the EU institutional framework and its functioning.

Figure 43. What would you be interested mostly as a main topic of the training sessions?



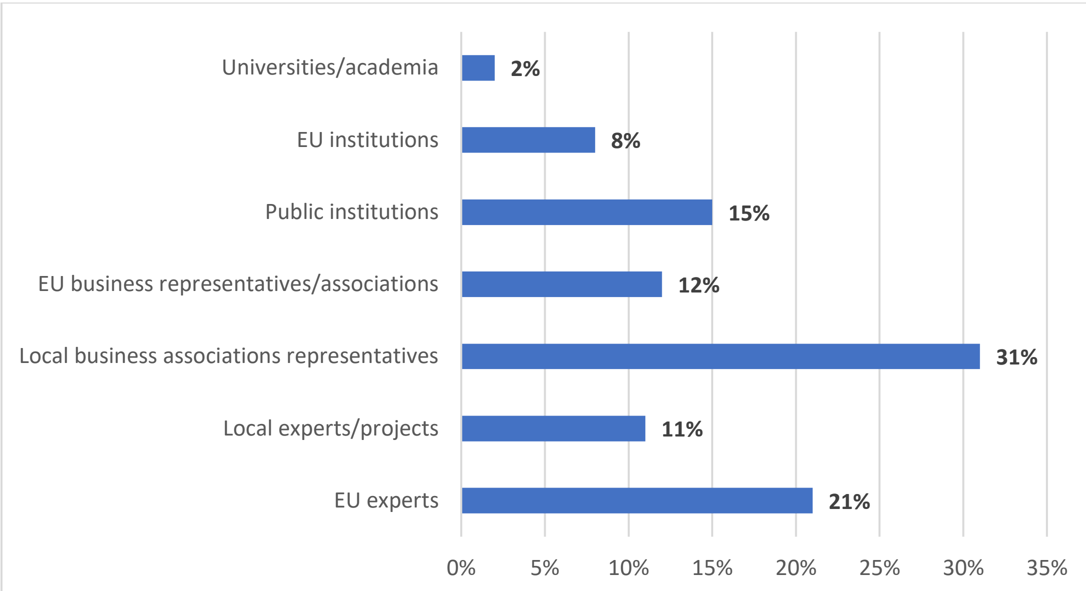
Sometimes, along with the message, the messenger is also important for achieving the aimed results. Therefore, we asked businesses what their preference would be in terms of choosing who to organise and deliver the capacity building activities.

Interestingly, almost a third of the respondents chose their business associations and their representatives (31%) confirming their relevance in transferring up-to-date knowledge and information to their members.

Another consistent group of 21% opted for EU experts, considering also their direct experience with EU regulations and processes. Only 15% would prefer having Albanian public institutions training them on EU related topics.

Other categories have included EU business associations or partners (12%), local experts (11%), and EU institutions representatives (8%). Once again, there is a very low expectation from domestic universities and academia with only 2% of companies opting for them.

Figure 44. Who would you prefer to deliver capacity building sessions?



8. Conclusions and capacity building recommendations

Overall, Albanian companies have a low level of knowledge and information regarding the general institutional framework and functioning of the EU. Although there are some interesting perceptions in terms of EU mission and its objectives, there is a clear gap in understanding EU institutions and its policy-making structure. In addition, businesses present very little connection and exposure to EU representatives (institutional representatives or business groups). The single market represents a topic with a high incidence in terms of lack of information.

In terms of the accession process, businesses seem to have a medium level of knowledge. While they view the EU and most of its purposes as related to economy, respondents recognize, partially, the importance of the political criteria for becoming EU member. However, businesses are quite confused when it comes to explaining the current status of accession negotiations of Albania with the EU. They view the accession process mostly dependent on economy, and domestic politics and public institutions. Based on their answers, enlargement process is another weak point in terms of information gaps.

When it comes to perceptions on costs and benefits from EU membership, companies have clearer views on what to expect. They appear to have sufficient information on the areas where EU accession improves standards, and what elements their sector and company might benefit from. In terms of costs, there is less information available from them, although they already have some ideas on which would be the most pressing issue and challenge to overcome (adapting to EU standards and legislation).

It is worrying that a considerable number are experiencing uncertainty on the process due to lack information, especially when it comes to foreseen potential costs.

Media and foreign business partners are the main sources of information on EU accession processes, for Albanian companies. This is quite important since more official channels of information (such as public institutions or EU representatives) are ruled out, to some extent. In this perspective, there is a need for improving outreach towards business community, and for providing continuous capacity building programs for the media and journalists, since they already have the function of informing them. It is obvious that business representatives believe that they have considerable gaps and need for more information on EU affairs (73%).

Companies' representatives feel quite comfortable regarding their own management and organisational capacities, and the networking abilities, when it comes to getting ready for membership challenges. However, they lack confidence in most of the other areas where plenty of work is required. Human resources and financial capacities remain the main obstacles. In respect to public institutions, they point out the lack of support and the instability of policies. Their expectations are quite high from public institutions, especially for support in meeting EU standards. A large majority of respondents are quite realistic regarding the timeline required for them to be prepared for membership.

Last, businesses are slightly sceptical on frequent training sessions, as a method for acquiring more information on EU accession. Although they have broadly participated in these activities organised mostly by donors and their business associations, a considerable part of them has not perceived these as useful to their company. In return, they are not very enthusiastic to engage often in such sessions. However, they have clear ideas on what these events need to tackle in terms of topics (meeting EU standards) and who should deliver them mostly (associations and EU experts).

8.1 Training curricula input

Based on the findings and main conclusions of this study, the team of experts has prepared a set of recommendations as input for potential capacity building programs. This refers to sessions that would aim at reducing or closing the current information and knowledge gap among companies. Before jumping into the actual themes, below we list a few points emerged from the analysis, which are important for the **methodology approach** for the capacity building sessions:

1. Usefulness. Training activities should be as much tailor made as possible. While advancing in the accession process, topics should become directly related to their actual concerns and challenges ahead, by sector, or by area. It is advised to avoid content related to the general functioning of the EU and its institutional framework, but rather try to bring relevant information on the single market and its requirements for the specific sectors. We suggest organizing sessions by sector and, if possible, by sub-sector.

2. Effectiveness. Business representatives appear to be tired from training sessions over the years. In this regard, they express this by claiming that these activities are time consuming and not very effective for their economic activity. In order to address this concern and negative perception from the past, sessions should not be organized too often, and need to be coordinated and discussed with representatives on their content and usefulness.

3. Delivery. It emerged from the questionnaire answers that information received from business associations (first) and EU experts (second) has been the preferred ones. The high preference for the first is related to the capacity of associations to know their audience, their needs, and how to structure and pack the information in a more digestible way for their members. In addition, involving associations would increase ownership in the process, and ensure long-term sustainability of the capacity building programs (making it an effective ToT method). We believe that a combination between associations and selected EU experts could give optimal results in terms of delivery of the information.

4. Case studies. A good approach preferred by companies is the use of case studies. Bringing content in a more practical way, bases on best practices, has more chances of catching attention and mobilizing companies to acquire more information and knowledge. Along with explanation of EU standards and requirements in the accession process for each sector, it is suggested to use regularly case studies and concrete experiences and testimonies from speakers, whenever possible. Especially, involving Croatian business associations representatives could be an added value.

In terms of **<u>content and themes</u>** of training sessions, the study report identified several areas where business representatives displayed considerable gaps. However, the proposed themes are more related to two aspects: First, topics that will be useful for them in the process, based on our expertise and knowledge (rather than any issue where they present gaps). Second, areas where they strongly and directly requested support and assistance for receiving comprehensive information. Below you can find a list of the main identified needs:

Topic 1: EU regulations, standards, requirements

More than any other element, this has been a main theme repeated throughout the questionnaire and validated with cross referenced questions. There is a positive attitude and awareness on the importance of having specific information for the upcoming stages of the process, and for EU membership, in terms of requirements for their sector. Tailor-made and sector-based capacity building programs should consider this as a main theme. The suggestion is to include concrete regulations that are foreseen to be adopted in early stages of the process, in order to make the knowledge acquired more tangible and practical.

Topic 2: Costs of adaption

It emerged from the study that information levels on costs of EU accession are low, with distorted perceptions and/or wrong convictions. We propose that case studies on costs by sectors and by company, based on previous experiences of accession, should be brought to the attention of Albanian businesses. This would help them to have a clear perspective on their needs and efforts required in the medium and long-term.

Topic 3: EU funds after membership

In view of understanding better benefits and potential support, companies appear to have very little knowledge regarding funding benefits once Albania becomes an EU member. Structural funds, cohesion fund, common agriculture policy, etc. should be explained to companies. On one hand this will inform them on potential benefits, and, on the other hand, it will motivate them and improve support for the process in facing its efforts.

Topic 4: Domestic organization of the process

'Who does what' in Albania for EU accession, is another important aspect of keeping companies involved and engaged in the process. With the new institutional set-up for accession negotiations and the EIPP in place, businesses should have clear information on institutional entry points, their role and dynamics, and how can they be involved.

Topic 5: Technical assistance on stages and planning

A quasi-mentoring module should be envisaged in the capacity building programs. This component should serve the purpose of explaining companies the stages of accession negotiations and their specific implications for their company. In addition, based on this information, this support should help them in acquiring knowledge and skills for planning.

Annex I. Questionnaire

1. General information about your organization

1.1 Main area of business/industry:

a) Banking sector	☐
b) Wholesale and retail	☐
c) Tourism	☐
d) Fason sector (inward processing)	☐
e) Industrial production	☐
f) Telecommunication and digital services	☐
g) Construction	☐
h) Agriculture	☐
g) Other	☐

1.2 Total turnover for 2019 in Euro:

a) 50.000 - 200.000	☐
b) 200.001 - 1.000.000	☐
c) 1.000.001 - 5.000.000	☐
d) 5.000.001 +	☐

1.3 Total number of employees in 2019:

a) 1 - 50	☐
b) 51 - 200	☐
c) 201 - 500	☐
d) 501 +	☐

1.4 In which geographic markets did you sell goods or services during the last three years?

	Yes	**No**
National	☐	☐
European Union (EU) countries and EFTA	☐	☐
Western Balkans	☐	☐
All other countries	☐	☐

1.5 Is your company part of a foreign enterprise/franchise/group?

Yes	No
☐	☐

2. General information on the EU

This section aims at capturing the general/average understanding of companies in regard to EU institutional framework and its functioning.

2.1 What does the EU represent for you? (Please choose 1 alternative which is closer to your opinion)

a) A political union based on democracy and human rights ☐

b) A single market to promote economic prosperity ☐

c) An organization with limited activities ☐

d) A geopolitical actor with strategic global interests ☐

2.2 Which EU institution are you most familiar with?

a) The European Commission ☐

b) The European Parliament ☐

c) The Council of the European Union ☐

d) The European Court of Justice ☐

2.3 Have you ever been in contact with any EU institution or representative?

Yes	No	Do not remember
☐	☐	☐

2.4 Which institution has the biggest decision-making power in the EU?

a) The European Commission ☐

b) The European Parliament ☐

c) The Council of the European Union ☐

d) The European Court of Justice ☐

2.5 Have you ever had contact with any EU interest group (business association) in your sector?

Yes	No	Do not remember
☐	☐	☐

2.6 Rate your general knowledge regarding the following:

	High	**Medium**	**Low**	**None**
The Single Market	☐	☐	☐	☐
EU regulatory framework for your sector	☐	☐	☐	☐
EU institutions	☐	☐	☐	☐
EU interest groups in your sector	☐	☐	☐	☐

EU expertise/consultancy services in your country	☐	☐	☐	☐

3. The Enlargement policy and processes

3.1 What is the EU interest in the Balkan region?

a) Economic interest in Balkan economies ☐

b) Ensure peace and stability ☐

c) Expand its global influence and power ☐

3.2 What is the main criteria for EU membership?

a) Democracy and human rights ☐

b) A strong economy ☐

c) Full alignment with EU foreign policy ☐

d) Same culture and religion as EU ☐

3.3 Is Albania a candidate country for membership?

Yes	No	I don't know
☐	☐	☐

3.4 Has Albania started accession negotiations for EU membership?

Yes	No	I don't know
☐	☐	☐

3.5 What is required most for a successful negotiation process with the EU?

a) Intense lobbying at high levels ☐

b) Economic power of the country ☐

c) Political consensus and cooperation ☐

d) A functional and professional public administration ☐

3.6 What do you think is the main obstacle for Albania in achieving membership?

a) Political culture ☐

b) Weak economy and standards ☐

c) Discrimination against Albania ☐

d) Weak institutions and law enforcement ☐

3.7 When do you expect Albania to become EU member?

a) Within 2030 ☐

b) Within 2040 ☐

c) Beyond 2040 or never ☐

4. Expectations on costs and benefits of EU membership

4.1 Who do you think would benefit most from EU membership?

a) Businesses ☐

b) Consumers ☐

c) Politics and institutions ☐

4.2 Which business sector would benefit most from EU membership?

a) Industrial production ☐

b) Agriculture ☐

c) Tourism ☐

d) Services ☐

4.3 What benefit do you expect your own business to obtain most?

a) Lower costs of production / Financial support ☐

b) Increased exports / turnover ☐

c) Increased product quality / innovation ☐

d) Better protection / legal certainty ☐

4.4 What benefit do you expect your sector to obtain most?

a) Increased fair competition ☐

b) Increased collaboration with EU partners ☐

c) Better access and exposure to international markets ☐

d) Increased support and employment ☐

4.5 What do you expect to be the main costs for your company with EU membership?

a) Adapting to EU regulations and standards ☐

b) Pressure from EU products competition ☐

c) Required investments in new technologies ☐

d) Increased expenditures for other soft activities/expertise, etc. ☐

4.6 In your company's case, do you think benefits in the long term would justify costs of membership?

Yes	No	I don't know
☐	☐	☐

4.7 Do you think you will be able to afford costs that membership might require for your company?

Yes	No	I don't know
☐	☐	☐

5. Information channels and patterns

5.1 How often do you receive information regarding EU integration processes?

a) Once a month	☐
b) Once a year	☐
c) Very rarely	☐
d) I don't know / remember	☐

5.2 Rate the importance of these sources of information for you, in relation to EU integration:

	High	**Medium**	**Low**	**None**
Albanian institutions	☐	☐	☐	☐
Political representatives	☐	☐	☐	☐
EU institutions/projects	☐	☐	☐	☐
Traditional media (TV, newspapers, etc.)	☐	☐	☐	☐
On the internet	☐	☐	☐	☐
Your business association	☐	☐	☐	☐
Your company group	☐	☐	☐	☐
Your EU/foreign partners/suppliers	☐	☐	☐	☐
Civil society and/or experts	☐	☐	☐	☐
Academia/Universities	☐	☐	☐	☐

5.3 Do you think that business community should be informed more on the process?

Yes	No	I don't know
☐	☐	☐

5.4 How often would you prefer receiving information on EU integration for your sector?

a) More than once a month ☐
b) Quarterly ☐
c) Twice a year ☐
d) Once a year or less ☐

5.5 Please rate the level of information that you have for your specific sector, regarding:

	High	Medium	Low	None
Requests of EU standards and regulations	☐	☐	☐	☐
Access to your sector market in the EU	☐	☐	☐	☐
Main export documentation to EU	☐	☐	☐	☐
Investment needs for your company after accession	☐	☐	☐	☐
Institutional contact points for the process	☐	☐	☐	☐
Phases of the process that affect your company	☐	☐	☐	☐
Experiences from sectors in other accession countries	☐	☐	☐	☐
EU funding for your sector	☐	☐	☐	☐

6. Perceptions on readiness and needs

6.1 Please rate the level of preparation of your company in the following areas:

	High	Medium	Low	None/NA
Adaptation to EU standards and regulations	☐	☐	☐	☐
Networking and integration with EU market	☐	☐	☐	☐
Financial capacities for potential investments	☐	☐	☐	☐
Professional/technical capacities of staff	☐	☐	☐	☐
Management and organisational capacities	☐	☐	☐	☐
Technological readiness/update	☐	☐	☐	☐
Marketing and commercial instruments	☐	☐	☐	☐

6.2 What would you consider your main internal shortcoming in preparing for EU single market?

a) Product quality and standards ☐
b) Production technology and innovation ☐
c) Human resources ☐
d) Financial capacities ☐

6.3 What would you consider a main country shortcoming that affects your potential for EU markets?

a) Fiscal pressure ☐
b) Unfair competition ☐
c) Instability of policies / regulations ☐
d) Lack of institutional support ☐

6.4 What kind of support would work best for your company to prepare for EU market?

a) Access to credit with favourable terms ☐
b) Ease of bureaucratic burdens ☐
c) Assistance and mentoring/guidance on the integration process ☐
d) Support for marketing/outreach to new clients and market ☐
e) Sector based and tailor-made policies/support ☐
f) Support for meeting EU standards and requirements ☐
g) Technology and innovation ☐
h) Human capital ☐

6.5 Who do you think should have the major role in preparing companies for EU accession?

a) Public institutions ☐
b) EU institutions ☐
c) Companies themselves ☐
d) Universities / specialised institutes ☐
e) EU business partners ☐
f) Business associations ☐

6.6 How much time do you think your company will require to be fully prepared for EU market?

a) Less than 1 year ☐
b) 1-3 years ☐
c) 4-7 years ☐
d) More than 8 years ☐

7. On modalities of knowledge transfer and capacity building

7.1 Have you and/or your staff ever had training on EU related affairs in the past?

Yes	No	I don't remember
☐	☐	☐

7.2 For those who participated, how many times have you been in similar informative activities?

a) One time ☐

b) 1-5 times ☐

c) 5-10 times ☐

d) More than 10 times ☐

7.3 Who undertook the training sessions you were part of?

a) Public institutions ☐

b) Donors and/or their projects ☐

c) Business associations ☐

d) Universities / local experts ☐

7.4 How would you rate the usefulness of these meetings for your economic activity?

a) High ☐

b) Medium ☐

c) Low ☐

d) Very low ☐

7.5 Given your needs for information and knowledge on EU accession and its market, would you and/or your staff be willing to participate in training sessions?

Yes	No	I don't know
☐	☐	☐

7.6 How often would you prefer being part of these activities?

a) Every month ☐

b) Quarterly ☐

c) Twice a year ☐

d) Once a year or less ☐

7.7 What would you be interested mostly as a main topic of the sessions?

a) EU standards and regulations for your sector ☐

b) EU institutions and policy-making ☐

c) Technical aspects of the EU accession process ☐

d) Challenges and benefits from EU membership ☐

7.8 Who would you prefer to deliver capacity building sessions?

a) EU experts ☐

b) Local experts/projects ☐

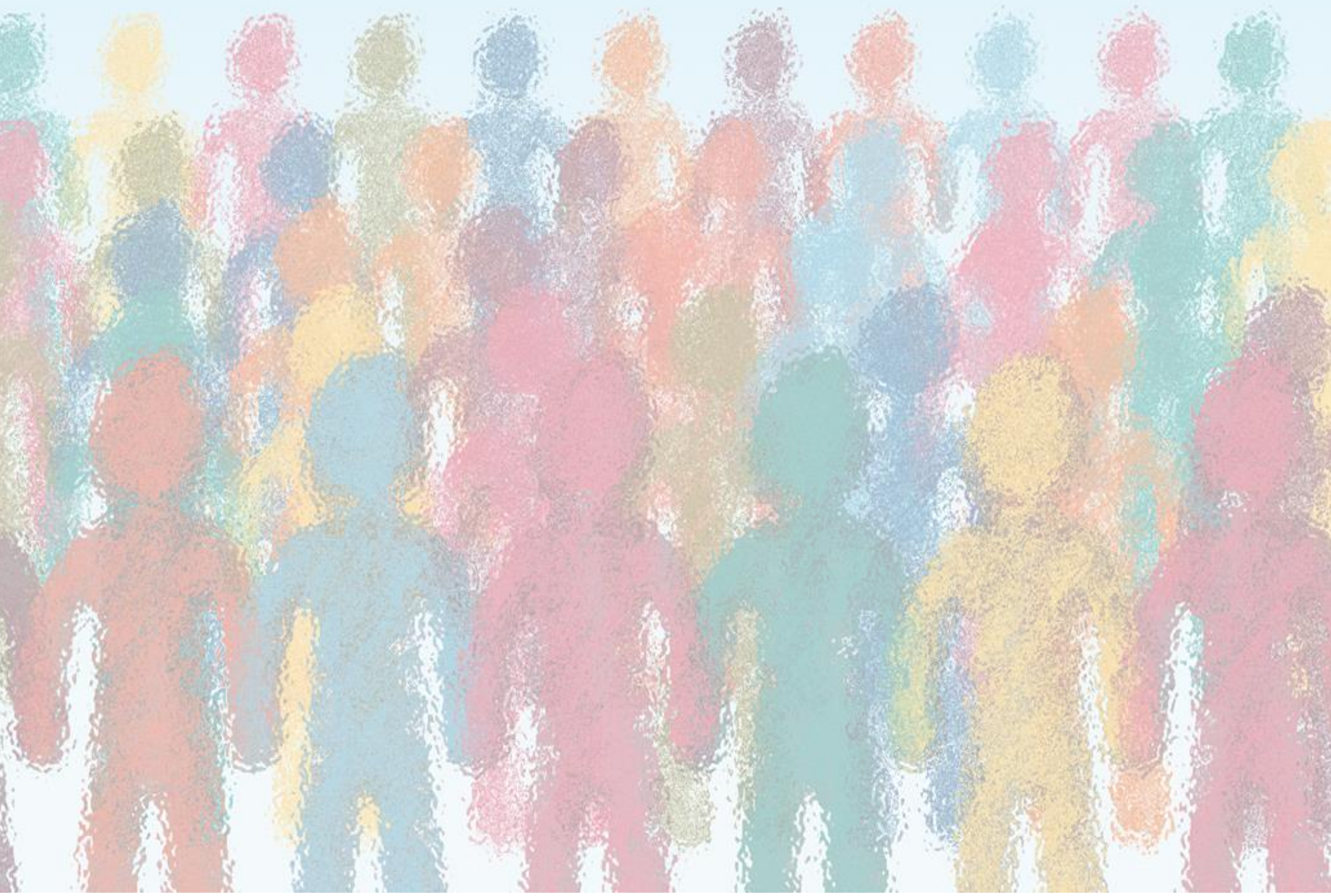
c) Local business associations representatives ☐

d) EU business representatives/associations ☐

e) Public institutions ☐

f) EU institutions ☐

g) Universities/academia ☐



Support to Accession Negotiations in Economic Chapters of the Acquis

Project:

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