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THE ZERO DRAFT ROADMAP FOR THE SUSTAINABLE DEVELOPMENT GOALS

**European Union Green Agenda in Albania's
textile, clothing, leather and footwear
(TCLF) sector**

ACKNOWLEDGEMENT

This draft report has been produced by the United Nations Industrial Development Organization (UNIDO) under the general guidance of Tatiana Chernyavskaya.

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The Zero Roadmap activity was managed by UNIDO, under the SIDA-funded Joint UN Program SDGs for Business in Albania 2021-2023.

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THE ZERO DRAFT ROADMAP FOR THE SUSTAINABLE DEVELOPMENT GOALS (SDGS)

INTRODUCING EUROPEAN UNION GREEN AGENDA IN ALBANIA’S TEXTILE, CLOTHING, LEATHER AND FOOTWEAR (TCLF) SECTOR

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LIST OF ACRONYMS

Acronym	Explanation
AIDA	Albanian Investment and Development Agency
ALL	Albanian Lek
CE	Circular Economy
CFMB	Corporate Fiber and Material Benchmark
CMT	Cut, Make, Trim
ESG	Environment, Social, and Governance
EC	European Commission
EU	European Union
FDI	Foreign Direct Investment
FP	Full Package
GVC	Global Value Chain
GoA	Government of Albania
ILO	International Labour Organization
INSTAT	National Statistical Institute of Albania
MoU	Memorandum of Understanding
PUT	Polytechnic University of Tirana
ProExport Albania	Association of Garment and Footwear Enterprises
3Rs	Reduce, Reuse, Recycle
RECP	Resource Efficient and Cleaner Production
SP	Service Provider
SME	Small and Medium Enterprises
SDG	Sustainable Development Goal
SWOT	Strength, Weaknesses, Opportunities and Threats
TCLF	Textile, Clothing, Leather, and Footwear
UN	United Nations
UNEP	United Nations Environment Program
UNIDO	United Nations Industrial Development Organization

1 THE PURPOSE OF APPLYING THE ZERO DRAFT ROADMAP FOR SDGs/EU GREEN AGENDA IN ALBANIA'S TEXTILE, CLOTHING, LEATHER AND FOOTWEAR SECTOR

The Zero Draft Roadmap for SDGs/EU Green Agenda in the textile, clothing, leather, and footwear (TCLF) sector in Albania has been produced as part of the “Business Partnership and Solutions for SDGs in Albania” project, funded by the Swedish Government.

The Zero Draft Roadmap for SDGs/EU Green Agenda in the TCLF sector complements the stocktaking paper, “SDG Principles and Positive Practices Adopted by the textile, clothing, leather, and footwear sector in Albania”. Guided by a thorough analysis, the results of the survey, together with the TCLF sector and a set of recommendations, reflect the vision of United Nations for Industrial Development Organization (UNIDO) and International Labour Organization (ILO) in achieving a balanced approach that contributes towards the achievement of SDG targets. Hence, the Zero Draft Roadmap aims to build upon the increased momentum and promote synergies for an efficient use of resources and better working conditions, making the TCLF sector in Albania more competitive and environmentally sound.

Global crises such as the COVID-19 pandemic and the war in Ukraine have influenced the production activities of Western investors, as well as their engagement with former markets such as those in Asia. In this sense, Albania might be a potential beneficiary of the associated nearshoring. Therefore, it is essential that its TCLF sector becomes sustainable and competitive for global markets, by championing better working conditions, higher productivity, flexibility, product diversification, and cooperation among partners. The Zero Draft Roadmap for SDGs/EU Green Agenda in the textile, clothing, leather, and footwear sector intends to define concrete steps that will strengthen the capacities of the TCLF sector in Albania to implement the United Nations SDGs (particularly SDGs 8¹, 9², and 12³). The Zero Draft Roadmap is inspired by the “European Green Deal”⁴, which aims to apply the principles of zero-carbon, zero-toxins and zero waste to boost the efficient use of resources, mitigate climate change, slow biodiversity loss,

and cut pollution, helping the EU Members States transition to a Circular Economy. For the purpose of this roadmap, the “Guidelines for the Implementation of the Green Agenda for the Western Balkans”⁵ interpret these principles for the region. The proposed actions for the textile sector also aim to pave the way towards the implementation of the EU strategy for sustainable textiles⁶.

The application of the Zero Draft Roadmap for SDGs/EU Green Agenda in the textile, clothing, leather and footwear sector in Albania is in line with:

- The draft National Strategy for Development and Integration until 2030 (NSDI) , with nationalized goals and targets for selected Sustainable Development Goals (SDGs);
- UN Sustainable Cooperation Framework (UNCF) 2022 – 2026, signed by the Albanian Government and UN agencies;
- National Plan for European Integration (NPEI), 2022-2024, based on the priorities of the Programme of the Albanian Government for the period 2021-2025;
- The Economic Reform Programme (ERP), 2024-2026;
- Decent Work Country Programme (DWCP) 2023- 2026, which defines concrete priorities for the greening of the TCLF sector and the design of the Occupational Health and Safety Strategy 2023-2026;
- The international labour standards and human rights, ratified by Albania.

The Zero Draft Roadmap for SDGs/EU Green Agenda in the textile, clothing, leather and footwear sector outlines a guiding structure based on pillars and constituent actions, building on existing initiatives and is in close coordination with the primary institutions responsible for the targeted SDGs: the Ministry of Finance and Economy, the Ministry of Tourism and Environment, the National Agency for Employment and Skills (which includes the vocational education and training system), the Employers’ Association, trade unions, universities, the National Statistics Office, and NGOs.

¹ Decent Work and Economic Growth

² Industry, Innovation and Infrastructure

³ Responsible Consumption and Production

⁴ https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal_en

⁵ https://neighbourhood-enlargement.ec.europa.eu/system/files/2020-10/green_agenda_for_the_western_balkans_en.pdf

⁶ https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/12822-EU-strategy-for-sustainable-textiles_en

⁷ Developed and consulted upon with the key stakeholders in the course of 2023.

The Zero Draft Roadmap intends to:

1. Map the major hotspots for sustainability in the apparel value chain in Albania based on the use of sustainable materials, waste minimization and recycling, and energy efficiency;
2. Build a basis for enterprises to enhance capacities by providing product design and sourcing of sustainable materials;
3. Identify the most impactful actions that TCLF sector and the Albanian Government can take to address the issue of quality when it comes to jobs in the textile, clothing, leather, and footwear sectors (working conditions, productivity, occupational safety and health, etc.);
4. Highlight the challenges related to taking action, and provide potential solutions to improve the environmental and social performance of the textile, clothing, leather, and footwear sectors;
5. Identify the stakeholders and existing initiatives to increase sustainability and circularity in the TCLF sector.

The Zero Draft Roadmap for SDGs/EU Green Agenda in the TCLF sector is planned to cover a three-year period from 2023-2025, encompassing a set of activities, methodologies, and tools that are recommended for implementation by the relevant stakeholders.



2 | METHODOLOGY

The Zero Draft for SDGs/EU Green Agenda in the textile, clothing, leather, and footwear sector comprises three planned phases, the first two (preparatory ones) of which are already implemented:

Phase 3

Endorsement of the Zero Draft Roadmap for SDGs/EU Green Agenda in the TCLF industries

This document has been finalized in 2023 through consultations with key stakeholders, including government institutions (such as ministries, local government, and national councils¹⁰), social partners (employers' associations, trade unions, civil society organizations, financial institutions, and academia), businesses, as well as experts and other groups of interest.

Phase 1

Data Collection, Observations, and Stakeholder Mapping

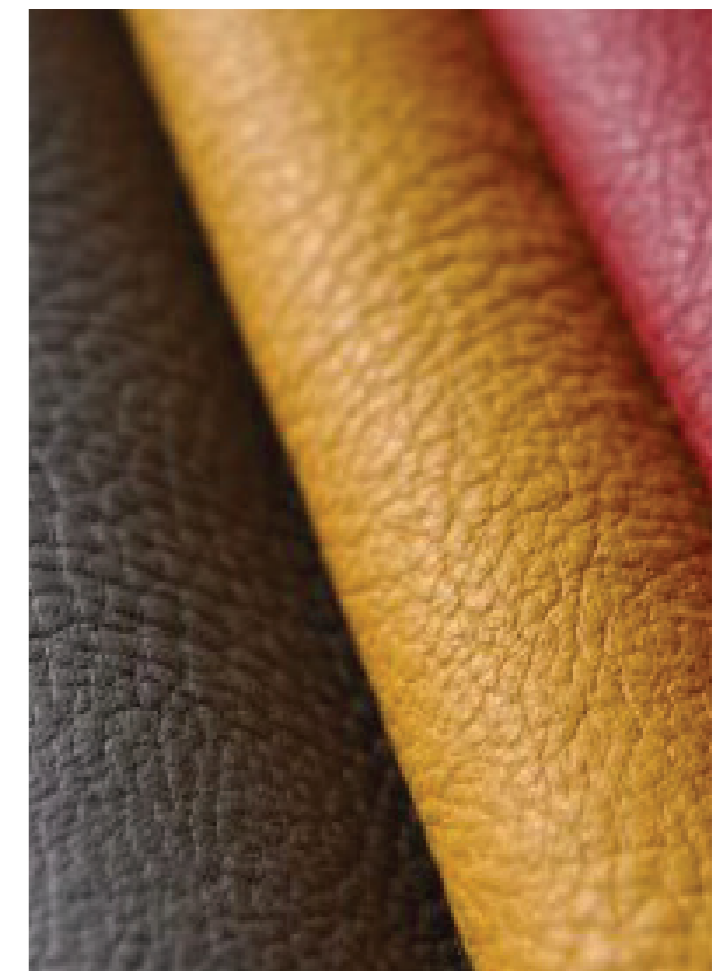
The main goal of the first phase was to assess the progress of the textile, clothing, leather, and footwear industries in Albania towards the targeted SDGs: Goal 8 (Decent work and economic growth), Goal 9 (Industry, innovation, and infrastructure), and Goal 12 (Responsible production and consumption). The phase considered the main findings of the stocktaking paper "SDG Principles and Positive Practices Adopted by the textile, clothing, leather, and footwear sector in Albania" prepared by ILO and UNIDO in 2022⁸, including the results of the survey conducted within 50 enterprises. The analysis was enriched by the Sustaining Competitive and Responsible Enterprises (SCORE Baseline Assessments) and the Resource Efficiency and Cleaner Production (RECP) Enterprise Assessments. All of the above serve as the inputs for the Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis of the TCLF sector.

The proposed Zero Draft Roadmap takes into consideration the recommendations and suggestions derived from the consultation process with the key stakeholders. The endorsed Zero Draft Roadmap will also serve as a basis to develop a

Phase 2

Stakeholder consultations to agree on the Zero Draft Roadmap for SDGs/EU Green Agenda in the TCLF industries

The Zero Draft Roadmap for SDGs/EU Green Agenda in the TCLF sector in Albania collected feedback in a consultative (both in groups and through individual engagements) format, which involved the main stakeholders of the sectors⁹, whereby the received recommendations were then incorporated into the document. The final version of the Zero Draft Roadmap and its corresponding Key Performance Indicators (KPIs) was validated in small focus groups lead by the technical experts from UNIDO and the ILO.



⁸As a part of the same project
⁹Organized on 25.10.2022, see <https://scantv.al/si-duhet-te-riformatohet-industria-fasone-projek-ti-te-shkohet-drejt-masave-eficente-te-ulen-kostot-e-prodhimit/?fbclid=IwAR1b19WY-NM6Fpw215xPaVOLAg86wdOirjQx8hF3MLKsZxw7uillM6aDk>
¹⁰Of municipalities, territories etc.

3 | SUSTAINABLE DEVELOPMENT GOALS IN ALBANIA AND THE EU GREEN AGENDA

The Sustainable Development Goals (SDGs) are a global call to action to end poverty, protect Earth's environment and climate, and provides a shared framework for peace and prosperity. Through a Sustainable Development Cooperation Framework agreed upon with the Government of Albania, the United Nations (UN), including its specialised agencies, fully supports and works towards the complementary agendas of Albania's accession to the European Union (EU). This also includes support to Albania's commitment to achieving the UN SDGs.¹¹

The UN Sustainable Development Cooperation Framework builds on the successes of the past cooperation, and represents a joint commitment to work in close partnership for concrete results that will lead the people in Albania to a more prosperous and sustainable economy, and a fairer and more liveable society.¹² The Sustainable Development Cooperation Framework agreed to by the Government of Albania (GoA) and the UN system describes three strategic priorities:

Strategic priority A: Human capital development and social inclusion.

Strategic priority B: Sustainable, resilient, and green economic growth and resource management.

Strategic priority C: Effective, people-centred governance, rule of law, human rights, and gender equality.

The Zero Draft Roadmap for SDGs/EU Green Agenda in the textile, clothing, leather and footwear industries focuses on guiding the TCLF sector to contribute to the achievement of the above-mentioned priorities and support the **four associated cooperation outcomes**¹³, namely:

Outcome A - By 2026, there is increased and more equitable investment in people, removing barriers and creating opportunities for those at risk of exclusion.

Outcome B - By 2026, innovative and integrated policy solutions accelerate sustainable, productive, and inclusive economic development, enhancing climate change adaptation and mitigation and transition to a green and blue economy.

Outcome C1 - By 2026, governance is more transparent and accountable, enabling people to enjoy quality, inclusive services, enhanced rule of law and access to justice in line with Albania's human rights commitments;

Outcome C2 - By 2026, gender responsive governance strengthens equality and non-discrimination, promotes women's empowerment and human rights, and reduces violence against women and children.

EU Green Agenda

The EU and the UN have consistently joined forces in their pursuit of building a world that is more enduring, secure, and enriched for everyone. The EU, therefore, supports effective

multilateralism and a rule-based international order, with the United Nations acting as the lead body. For this purpose, the SDGs are a useful tool for sharing the EU's values and objectives outside Europe and provide a common framework for international partnerships. It is therefore in the EU's interest to play a leading role in the implementation of the 2030 Agenda as part of its external action¹⁴.

Continued progress in implementing and achieving the SDGs, cooperation with partner countries and civil society, and representation of the EU in the United Nations High-Level Political Forum on Sustainable Development, are all crucial to advance the EU's commitment to sustainable development and leadership, as well as to combat the consequences of the COVID-19 crisis worldwide.

In 2019, the European Commission published the "European Green Deal", a strategy that pursues very aligned goals: to make Europe the first climate-neutral continent by 2050. The European Green Deal serves as a strategic response to address the existential threat posed by climate change and environmental degradation. Positioned as a novel sustainable growth strategy, it aims to establish a modern, resource-efficient, and competitive economy with net zero emissions by 2050. The strategy also seeks to decouple economic growth from resource utilisation, ensuring that no individual or place is left behind. The Green Deal is an integral part of this European Commission's strategy to implement the United Nation's 2030 Agenda and its corresponding SDGs.¹⁵

Based on the comparative advantages of the ILO and UNIDO, this document aims at coordinating actions, policy advice and advocacy for a quick and strong delivery of the results, and is anticipated to support Albania's efforts to join the European Union through fostering sustainable economic growth. This involves:

1. Ensuring quality working conditions, including occupational safety and health standards, promoting the creation of quality jobs, and facilitating the development of green skills;
2. Securing a more resilient industry infrastructure;
3. advocating for environmentally conscious industrial development;
4. Fostering innovation, sustainable consumption and production patterns.

¹¹ https://ec.europa.eu/info/strategy/international-strategies/sustainable-development-goals/eu-and-united-nations-common-goals-sustainable-future_en

¹² United Nations Sustainable Development Cooperation Framework 2022 – 2026

¹³ https://unsdg.un.org/sites/default/files/2021-06/Albania_Cooperation_Framework_2022-2026.pdf

¹⁴ https://commission.europa.eu/strategy-and-policy/international-strategies/sustainable-development-goals/eu-and-united-nations-common-goals-sustainable-future_en

¹⁵ <https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:52019DC0640&from=ET>



4 OVERVIEW OF THE TEXTILE, CLOTHING, LEATHER AND FOOTWEAR SECTORS IN ALBANIA

The TCLFs sectors make up a significant share of Albanian exports. In July 2022, the value of total exports was EUR 334,049,839, increasing by 23.0% compared with the same period of the previous year, and decreasing by 14.3% compared with June 2022. Within that annual increase of 23.0%, a positive contribution was made by the group, "Textile and footwear," adding 6.6 percentage points. Total exports during the first seven months of 2022 increased by 40.1% as compared with the same period of the previous year, where the group "textiles and footwear" held the 3rd place with 6.9%. The TCLF sector in Albania is characterised as labour-intensive. These type of enterprises are located all over the country and apply a diverse array of business models. The export of textiles and footwear, which constitute important shares of Albania's foreign trade, respectively, continued to recover during the first five months of 2022, accounting for 27% of the volume of exports.¹⁶The exports of this group were higher even compared to the first five months of 2019, which coincides with the period before the pandemic.

These sectors are also characterized by different enterprise sizes and varying degrees of progress towards accomplishing the Sustainable Development Goals. That is why placing the TCLF sector in Albania onto a more resilient sustainable path requires significant efforts to integrate existing policies, laws, and various stakeholders' plans into a single framework.

The Albanian Government is implementing important structural reforms that aimed to promote equitable growth, raise productivity and competitiveness in the economy, create more jobs, and improve governance and public service delivery. Enhanced regional connectivity and access to regional and global markets, along with export and market diversification, can also contribute to accelerating sustainable growth.¹⁷

¹⁶INSTAT, Albania
¹⁷<https://www.worldbank.org/en/country/albania/overview>
¹⁸<http://www.instat.gov.al/>
¹⁹Of municipalities, territories etc
²⁰<https://ata.gov.al/>
²¹United Nations Sustainable Development Cooperation Framework 2022 – 2026
²² Inward processing (IP) is a duty relief procedure. It allows goods to be imported into the European Union (EU) for processing, with suspension of import duties and VAT. The processed products which result from the processing can either be re-exported or released to free circulation.
²³<https://www.aida.gov.al/>

The value of total imports was EUR 82 billion, increasing by 14.1% as compared with the same period of the previous year and increasing by 0.6% as compared with June 2022. In June 2023 the total trade deficit was 42 billion, increasing by 6.9% as compared with July 2021 and increasing by 20.3% as compared with June 2022.¹⁸

Notably, the map of the geographical distribution of trade exchanges shows that the percentage of trade with Italy has decreased, mainly as a result of the continued poor performance of the "textiles and clothing" category¹⁹, confirming the need to further diversify the clients' network for Albanian businesses. The leather and footwear production in Albania is an important sector with a high potential to benefit the country's economy. At the end of 2021, there were approximately 236 footwear manufacturing factories across the country, with a total of more than 25,000 employees, or about 6% of the total workforce in the country.²⁰

The leather and footwear manufacturing sector in the country accounts for 20% of the total exports, generating approximately 500 million Euros per year. This is contrasted against the 2021 figure for the import of raw and processed leather, which totalled 6,906 tonnes.²¹Exports of manufactured products have been steadily increasing throughout the previous years, as has the import of machinery and equipment. It is a cost-competitive inward processing²² industry, primarily driven by the garment and high-quality leather footwear production with a significant level of expertise accumulated over the last 20 years. The main markets are Italy, Germany, Greece, France, and the Netherlands.²³

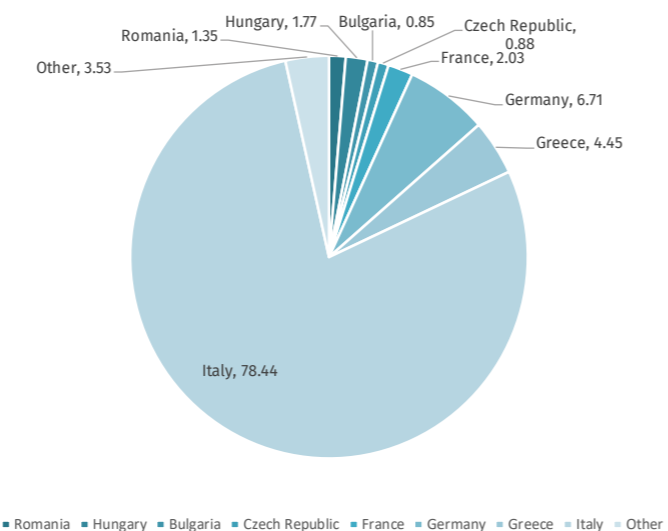


Figure 1. Export weight of textiles and footwear according to target countries (Source: Instat, 2021)

Number of enterprises

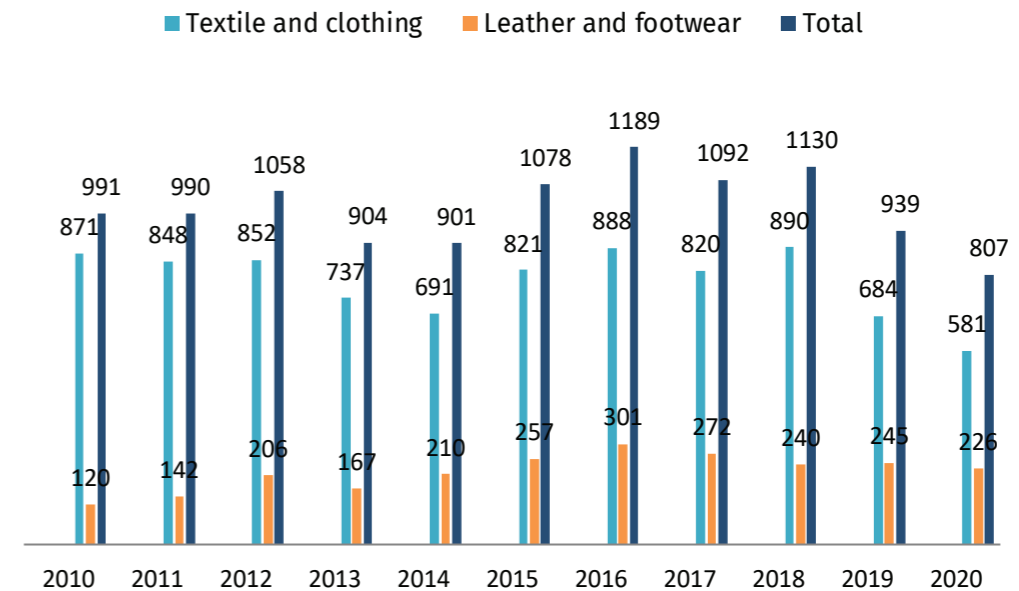


Figure 2. Number of textile and leather manufacturing enterprises during 2010 – 2020 (Source INSTAT Albania)

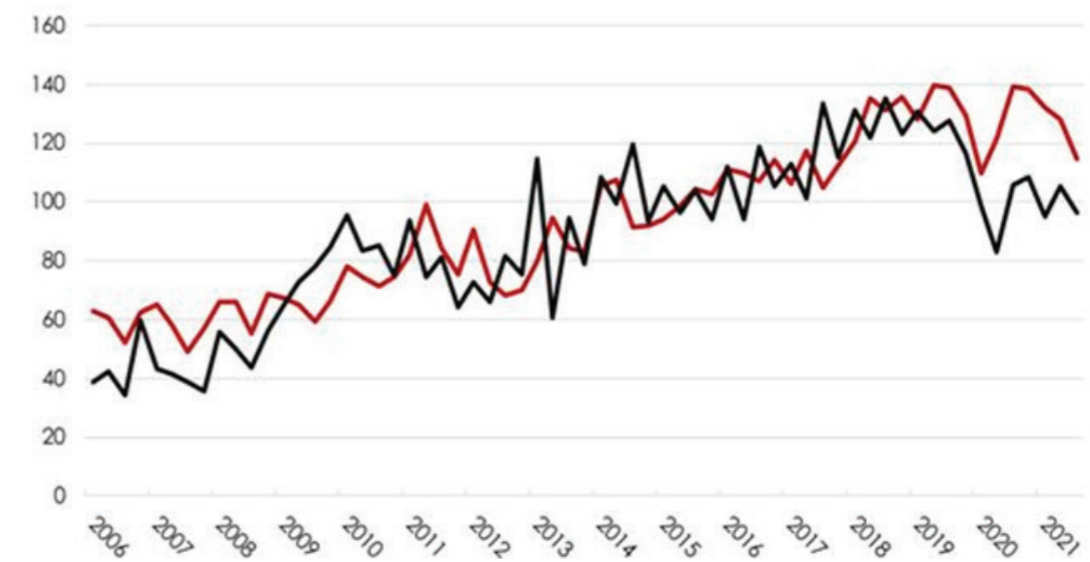


Figure 3. Production Volume Index for the Textile and garment manufacturing (red line) and Leather and Footwear

The figure reveals that 65% of the enterprises operate in the textile and clothing sectors with about 36,400 employees; whereas 35% of the enterprises operate in the leather and footwear sectors, accounting for 19,600 employees.

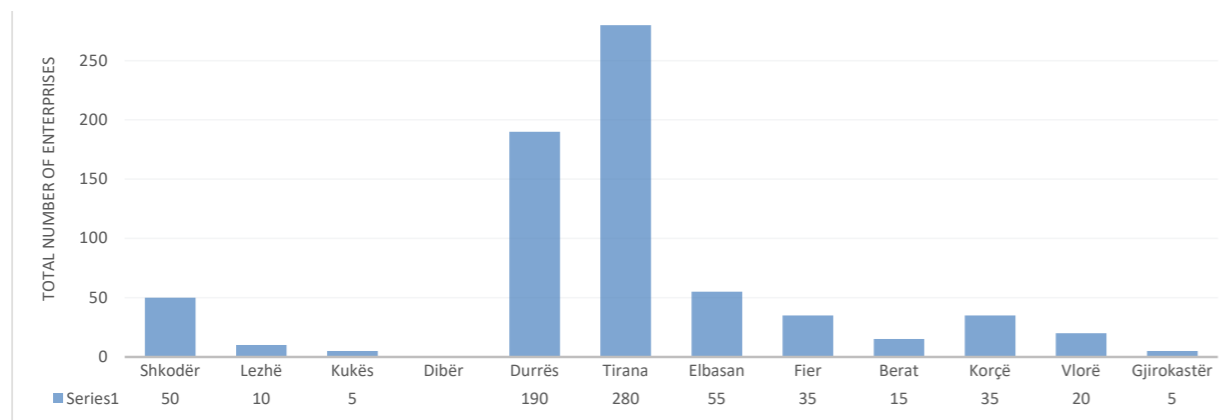


Figure 4. Geographical distribution of TCLF enterprises in Albania, 2020²⁵(Survey 2022)

Numerous enterprises in Albania have made great efforts to introduce their own brands to the market, with examples provided in the table below.²⁵

Table 1: Albanian manufacturing enterprises with their own brands and private label

Company	Own brands and private label
Donianna	Doniana, Mici's, Doniana Green, PIN shoes
FITAL	Opinga Opinga, KUSH
MiTO by Caterina Firenze	Caterina Firenze, Wrong, La Poeme
Ariee (Ish NPV korce)	Ariee
Bella Konfex	La Blanche and Plaetor
Blue Sky shpk	Krienko, KJL
Madison Avenue	Madison Avenue, Fashionista
Kler shpk	Essere
S.A.M	S.A.M (PL)
Ambra shpk	Ambra
Ola 1	Ola 1
Omega shpk	Omega
Alba shpk	Alba&N
Desa & Co shpk	Desa & Co

²⁵ProExport Albania

²⁵<http://aida.gov.al>



To verify the implementation of sustainable practices, a survey of fifty manufacturing enterprises was undertaken, whereby the selection of enterprises was driven by the necessity to ensure the representation of all types and sizes of production and operation. The main findings of the survey are summarized in the table below.

TABLE 2: Survey findings for TCLF manufacturing enterprises and recommendations		
Categories of survey questions	Main findings of survey in telegram style:	Recommendations
General information	Majority of enterprises in the TCLF sector in the country are 10 - 30 years old	
	64% of enterprises work for 1-5 foreign suppliers; 12% for more than 10 foreign suppliers	Production diversification
	46% of enterprises have full package operations and own their brand business model	Add value to the production chain
SDG8 – Sustainable economic growth; decent work for all	93% of enterprises have made significant investments in technology; and 86% still have plans for further investment	High value-added services
	46% of enterprises have an interest in finding new suppliers and new sources of raw materials	Production and export diversification
	The enterprises report labour shortages among the following occupations: sewing operators, textile engineers, pattern making specialists, machine maintenance technicians, production managers, quality control specialists, and graphic designers.	Improved human resource management Improved working conditions and higher wages Updated training curricula (VET Centres)
SDG9 – Resilient infrastructure; sustainable industrialization; foster innovation	70% of enterprises completely rely on suppliers for pattern design, technical specifications, production cards.	Increase competition with more technological investment; offer higher value-added services; increase competitiveness through innovation
	32% of enterprises source raw materials; 42% have acclimatization standards for the storage of raw materials; only 30% of them need or perform testing of raw materials; 59.3% have the capacity to make technical specifications and production cards themselves	Foster a more resilient infrastructure through value added processes towards material sourcing
	The main destination of the products of the enterprises is Italy with (40%); followed by the EU single market (unspecified 28%), Germany (16%), Greece (4%), the UK (4%), China (4%), and domestic distribution (4%).	Decrease reliance on the suppliers alone and diversify client base Enhance advanced training programmes relevant to the TCLF sector
	25% of enterprises have no training plans for employees and 7% prefer to hire trained employees	
	11% of responding enterprises complete quality control only at the end-of-line; 37% both end-of-line and middle-of-the-line – Around 50% do not complete any form of quality control	Provide ad hoc advanced training to the enterprises on “Quality Improvement”; “Lean Manufacturing”; and “Resource Efficiency” Introduce and improve KPIs
	46% of enterprises have no information on the lifespan of their products	Provide ad hoc advanced training to the enterprises on Resource Efficiency
SDG12 – Sustainable production and consumption patterns	35.7% of enterprises separately collect or recycle waste: Of those, 69% apply textile collection for recycling; 42% paper; 35% plastic; 15% leather; 23% electronics and batteries; and 8% oil	Waste management plans; separation and recycling
	Only 2 enterprises use organic materials; 18% use recycled materials; 53% unsure (it depends on the supplier); only 50% carry out material consumption analysis	
	71% of enterprises do not monitor their water, material, or carbon footprints	Increase cooperation between enterprises and foreign clients

The key enablers of actions are the stakeholders of the TCLF sector, which have their priorities and resources to make the identified recommendations a reality. A list of the key stakeholders and the associated SDGs was therefore compiled.

TABLE 3

List of the key stakeholders for SDGs implementation and progress monitoring

| Primary Institutional Responsibilities for SDG 8, by targets:

1. Ministry of Finances and Economy, Minister of State for the Protection of Entrepreneurship (8.1-8.4, 8.9, 8.10)
2. Ministry of State for Youth and Children, Minister of Health and Social Protection (8.5, 8.6, 8.7, 8.8, 8.b)
3. Ministry of Infrastructure and Energy (8.4)
4. Bank of Albania (8.10)

| Primary Institutional Responsibilities for SDG 9, by targets:

1. Ministry of Finances and Economy, and Minister of State for the Protection of Entrepreneurship (9.3)
2. Ministry of Infrastructure and Energy (9.1, 9.2, 9.4)
3. Ministry of Education and Sports, Agency for Research, Technology and Innovation (9.5, 9.b)
4. Electronic and Postal Communications Authority (9.c)

| Primary Institutional Responsibilities for SDG 12, by targets:

9. Ministry of Agriculture and Rural Development (12.3)
10. Ministry of Finances and Economy, Minister of State for the Protection of Entrepreneurship (12.6, 12.b)
11. Ministry of Tourism and Environment (12.4, 12.5)
12. Ministry of Education and Sports (12.8)
13. Ministry of Infrastructure and Energy (12.2, 12.c)
14. Agency for Research, Technology and Innovation (12.a)
15. Public Procurement Agency (12.7)

4.1 | STAKEHOLDER GROUPS DEFINITION

For the purpose of this draft roadmap, a list of stakeholders has been identified with their respective roles and tasks towards a more sustainable and circular textile sector²⁶:

1. Brands and retailers

For the purposes of this document, brands are established enterprises that do not have circular and sustainable approaches built into their business models. New innovative enterprises that are predicated on circularity and sustainability are covered under the group of 'innovators and recyclers.' Retailers include both in-store and online sales businesses that sell a range of products from different brands, with many also having their own products sold in-store. **ROLE:** To create new and attractive offers for the consumer through innovative circular and low-impact business models, and set and deliver targets that shift their business revenue and investments from linear to circular production models. They can design products intentionally for circular models which champion higher quality, durability, and a longer lifespan, while providing sufficient evidence that their offers and designs improve impacts and reduce consumption.

2. Communication and consumer engagement actors

There are several different types of organizations and outlets that engage with potential consumers, including brands, advertisers, print and digital media, social media and influencers, and film and television. Among these, brands, retailers, and media outlets stand out as the most influential groups in stimulating consumer demand. Nevertheless, innovators, policymakers, NGOs, and technical organizations are also notable actors as they're also strongly involved in consumer outreach. Their role is to shift engagement resources away from promoting linear and unsustainable models and products, and towards more sustainable and circular options.

3. Financial institutions

These include institutional and impact investors, philanthropic funders, development banks and organizations, venture capital and investment banks, commercial lenders, insurers and trade financiers. All of these actors have the potential to provide capital at various points in the value chain and develop innovative financial models or practices that can incentivize other participants. Their role is to proactively invest in sustainable business ideas, whether from well-established brands or start-ups. Thereby, they can ensure that investments are directed towards sustainable consumer offerings, ensuring identification and resolution of any challenges.

4. Innovators and recyclers²⁷

These two stakeholders within the textile value chain are often distinguished by their commitment to incorporating sustainability and circularity as foundational principles, and have an inherent mission to enhance those principles. Their role is to create new models of sharing, reuse, and longevity, while reflecting local identity and infrastructure context and incorporating a focus on R&D for new technologies to support circularity.

5. Non-governmental, academic and technical organizations

This group includes NGOs working on both environmental and social issues, as well as universities/academics, data providers, technical consultants, researchers and think tanks. UN agencies and intergovernmental agencies can also provide technical support, such as on-the-ground technical assistance or creation of science-based knowledge. These are generally the actors that are well placed to apply a detailed technical lens to the challenges of the value chain, pursue non-profit or market transformation goals, peer review data collection or studies, and involve various actors to collaborative problem-solving. They act as facilitators both challenging and supporting the ones that directly deliver on actions for a more sustainable and circular textile value chain. Additionally, they play a crucial role in supporting those that are less developed in the value chain. Their roles is to standardize and improve science-based methodologies aimed at measuring impact and risk, ensure universal access to data, and clarify and validate the use of terms 'circular' and 'sustainable.' Additionally, these actors can build the business case and evidence base for circular business models, and share actionable analysis of potential trade-offs with circular systems, future emerging technological innovations, and consumer insights. Furthermore, they can emphasize the importance of circular business models to consumers and raise awareness by sharing positive examples.

6. Policymakers

Policymakers can be represented both on the global and local level, holding various positions and being present on various institutional levels. Whereby, the local governments are often the ones that are most closely connected with the communities and businesses that operate within the textile value chain. This allows them to engage in collective decision-making processes with communities on allocation of resources, protections,

social schemes, or verification of impacts. As for the national governments, they play a crucial role in almost all policy interventions within the textile value chain. They can implement incentives, restrictions and enforcement, as well as set policy goals and plans. National government is not a monolith, and there are a range of different departments and roles at play. Therefore, the elected officials may have different interests and timelines in mind than civil service departments. Their Roles is to create policies and incentives for sustainable and circular business models, such as tax breaks; seed funding for circular business models; dedicated subsidies; offer additional

monetary support dedicated to various aspects, such as repair or refurbishment services. Additionally, they can also explore reporting requirements for enterprises on the proportion of revenue or investment that they are making in sustainable and circular business models.

7. Producers and manufacturers

These stakeholders produce the raw materials, process the products, and create finished goods.

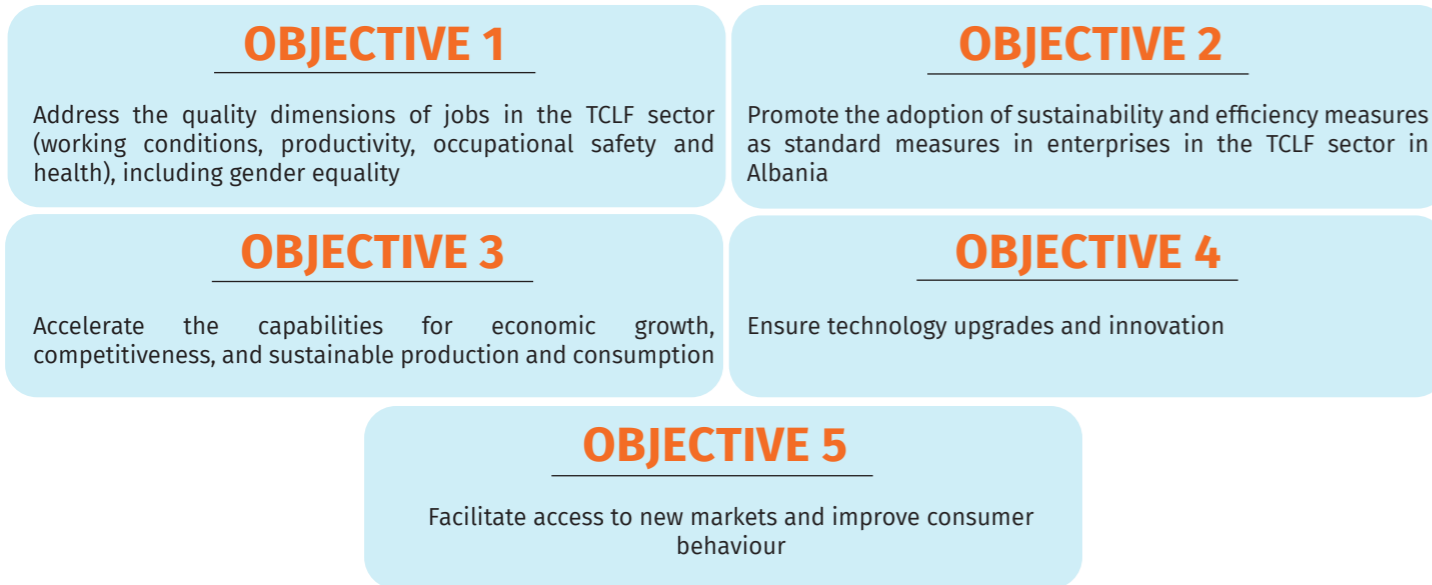


²⁶Sustainability and Circularity in the Textile Value Chain - A Global Roadmap, <https://www.unep.org/resources/publication/sustainability-and-circularity-textile-value-chain-global-roadmap>

²⁷Reference "Sustainability and Circularity in the Textile Value Chain" - A Global Roadmap, UNEP

5 | THE MAIN PILLARS OF THE ZERO DRAFT ROADMAP FOR SDGS/EU GREEN AGENDA IN TCLF SECTOR IN ALBANIA

The main objectives of the Zero Draft Roadmap for SDGs/EU Green Agenda in TCLF sector in Albania, which are expected to be translated into concrete actions, are:



The following areas will be prioritized in order to improve the sustainability performance of the clothing and footwear sectors during the following three years:

1. Working conditions

- Continue to encourage TCLF sector to proactively apply international labour standards in practice at the enterprise level
- Establish enterprise policies, procedures, safe complaint mechanisms, workplace committees, training programmes for managers and supervisors, and worker awareness programmes to eradicate labour rights violations in the workplace
- Improve official collection, analysis, and availability of data on trends, issues, and policy options related to pay equity, working hours, and informality within the TCLF sector
- Increase the availability of quality and affordable childcare services for TCLF sector workers

2. Occupational Safety and Health

- Formalise and reactivate occupational safety and health committees within the TCLF sector
- Create an OSH guideline system for the TCLF sector based on the ILO code of practice “Safety and health in textiles, clothing, leather and footwear”

- Improve reporting, recording, and notification of work-related injuries, illnesses, health conditions, and dangerous occurrences

3. Energy efficiency

- Maximise energy efficiency across the TCLF sector (use of energy efficient equipment, buildings, transport, etc.)
- Expand energy efficiency efforts across manufacturing facilities by generating awareness of energy efficiency
- Decarbonize energy use for raw materials, accessories, and product manufacturing
- Shift to 100 percent renewable electricity by 2050 . Deploy renewable electricity across the supply chain. Provide support to planning and financing
- Introduce energy metrics (KPIs) on an enterprise level, and on regional and national levels
- Provide support for demonstration projects in renewable energy (like photovoltaic plants)
- Synchronise the activities of different donors towards awareness-raising for energy efficiency

4. Water efficiency

- Reduce water consumption in TCLF industries, especially as activities are extended to producing fabrics, finishing them, and to expanding leather tanning
- Support wastewater treatment
- Introduce water consumption metrics (KPIs) on an enterprise level

5. Material efficiency

- Maximise material efficiency
- Reduce the amount of fibre and materials that go to waste in each stage of production, through design, material selection, and methods of manufacturing, especially as activities of enterprises are extended to selecting, acquiring materials, and managing waste
- Use sustainable materials and practices. Increase the use of monomaterials, more sustainable materials (such as recycled polyester) and practices (for instance, conservation tillage for cotton), especially as enterprises start to develop their own designs and specify raw materials
- Develop the infrastructure at universities to prepare the development of innovative materials. Explore opportunities for investment in next generation materials, including textile recycling, bio-based materials, and plant-based leather
- Provide clothing care and maintenance (cleaning, washing, etc.) for shorter (localised) supply chains
- Orient manufacturers around clients who focus on environmental protection, high performance, sustainability, animal welfare etc.
- Source sustainable materials and identify green clients in Europe and beyond
- Introduce waste metrics (KPIs) on an enterprise level

6. Chemical efficiency

- Improve management of chemicals, especially as activities are extended to producing fabrics, finishing them, and to expanding leather tanning
- Provide state-of-the-art safe storage of chemicals
- Replacement of hazardous chemicals
- Translate the collection of European regulations, like MSDS, and the relevant aspects of the ILO-WHO International Chemical Safety Cards TCLF sector into the Albanian language
- Create a guideline/checklist for the TCLF sector based on the European codes with reference to the ILO code of practice “Safety in the use of chemicals at work”

7. Waste management

- Promote waste separation
- Create infrastructure for waste management and recycling
- Cooperate with clients to minimize packaging for reduction of waste

8. Consumption trends and behaviour

- Fair trade
- Reuse
- Resell (second-hand,)
- Re-design to change consumer perception
- Sustainable design

9. Awareness, media, education, and cooperation

- Reduce the Environmental Impacts of Products Cleaning.
- Maximise reuse and recycling
- Measure progress of the indicators toward SDG implementation
- Eco-fashion activities
- Enhance cooperation with business networks and universities
- Develop vocational training schemes
- Collaborate with academia for student trainings and awareness-raising
- Support dual education for machine maintenance technicians and mechanics

10. Creating market drivers for sustainable clothing

- Public procurement
- Support gender-responsive technical innovation/upgrades as part of greening the TCLF sector

11. Instruments for improving traceability along the supply chain (ethics, trade, and environment)

- Ethical initiatives for some pilot enterprises
- Traceability programme for monitoring
- Regional activities to collect wastes separately
- Support recycling of fibres and packaging materials





5.1 | SWOT ANALYSIS OF THE TCLF SECTOR IN ALBANIA

The SWOT analysis is a structured planning method that was used to evaluate the strengths, weaknesses, opportunities, and threats to help to better understand the TCLF sector in Albania. It outlines the path for future development potential for the TCLF sector in Albania.

● Strengths

Albania's is located close to Italy, Germany and many other European countries. This makes Albania a natural strategic partner for European trade. Albania has a good regulatory framework: Law 52/2020, "For the Permissions of Environments", Changed; Decision of Council of Ministers No. 418, Date 27.05.2020, "For the Approval of the Strategic Policy Document and National Plan for Integrated Waste Management 2020–2035"; Law 92/2014, "For Value Added Tax in Albania", exemption from VAT for Machinery and Equipment imported from Garment and Footwear Industry and Small Businesses 21/11/2014; DCM no. 180, on 13.02.2013, "For the determination of the list of machines and equipment that are directly related to the investment and the procedures of exceptions and related criteria"; Decision of Council of Ministers No. 651 date 10/11/2017, "Customs Code"; Law 10440/2011 "For Environmental Impact Assessment". The entire regulatory framework shows that the Government recognizes the importance of the TCLF sector.

Albania has shown a very strong political commitment to economic reforms as part of EU accession process. Albania offers relatively low prices, a low-cost workforce and has a liberalized market. There is an active association, ProExport Albania, with 185 members from both sectors representing the interests of the TCLF industries. The employers' association actively protects and promotes the interests of the members and has a solid cooperation with all of the relevant stakeholders, including development and governmental agencies. The national scientific institutions actively engage in teaching, research, and development, and cooperate with the employers' association and the TCLF sector directly for mutual benefits. Academia is represented by the Polytechnic University of Tirana; the Polytechnic University of Tirana, Textile and Fashion Department; professional high schools; and vocational training centers.

Overall, the manufacturing enterprises in the TCLF sector have a good reputation and good relations with international brands. Most of the enterprises have a long-standing legacy in their respective sectors and have maintained stable cooperation with the same suppliers for many years.

● Weaknesses

Most of the enterprises in the TCLF sector in Albania completely rely on European clients for product design and materials selection, the R&D, innovation, value added processes still remain underdeveloped. There is a low competitiveness and weak market position of domestic market production in comparison to other countries in the region, especially due to the low productivity and poor marketing strategies of the enterprises. Many enterprises do not even have a website for presenting their identity and marketing their own activity. The survey done within this project showed that enterprises need to have more elaborated plans towards production diversification. They need to increase and diversify their client base to reduce dependence on a handful of larger clients. The return rate and number of defects which result during the assembly of products is higher than expected from the clients showing unreliable product quality. The absence of raw material sourcing capacity is another weakness, because of a high number of enterprises which cannot source their own raw materials and accessories as inputs for production. There is a large number of bureaucratic requirements associated with different key players (ministries, agencies, institutes, funding authorities, etc.) that create an increased administrative burden. The TCLF sector in the country lack cross-sectoral coordination. The TCLF sector is facing persistent labour shortages, but have attempted to diversify their recruitment strategies over the years. Historically, the majority of new entrants in the garment sector were recruited among unskilled rural women, often from the mountainous regions, but with time there was a shift to the recruitment of migrant workers. Due to the labour shortages or different cycles of production, most of the employees within the TCLF sector work overtime and on Saturdays. There is already a significant need for additional workers today, and this persistent shortage of labour is continually restricting the growth potential of the TCLF sector. The main technical issue remains the low production efficiency, due to an intermediate technological level and high maintenance costs across the TCLF sector. There are no sufficient incentives for stimulating innovation. For example, there are no adequate financial instruments, nor is there an institutional framework that links science with industry and the public sector. Plans to save energy are necessary given the presently high cost of energy. Wage floors for the TCLF sector occupational profiles are closely aligned with the minimum wage. The low wage levels, along with the low promotion potential in the TCLF sector, hinder not only the overarching job performance, but also the average quality

of the provided products and services. Lack of capacity and qualified personnel due to inadequate remunerations is another weakness of the TCLF sector.

Opportunities

The integration of Albania into the EU and the increasing interest of foreign investors in the Albanian manufacturing sector are important opportunities for the TCLF sector in Albania. There is a growing awareness and interest for internal cooperation within these manufacturing sectors, and an increasing attention to public-private cooperation and improvement of industry data and research. The Albanian Government has undertaken important public investments in infrastructure and regional development which makes Albania attractive for foreign investments. Through the Albanian Government's support programmes and donor projects in the TCLF sector, there are additional opportunities to enhance the skills of the labour force through VET programmes. Albania has embraced the global partnership, designed to make a strong contribution to the attainment of Agenda 2030, and is fully committed to implementing the Agenda 2030 in the context of the National Strategy for Development and Integration and the European integration process. The growing interest and requests from foreign suppliers for eco-labels and other conformity certifications, driven by customer demand, will create new opportunities for Albanian manufacturers towards growth and achievement of the SDGs.

There is a significant number of enterprises employing best practices and modern machinery, even as compared to their international competitors. These enterprises can serve as role models for their peers in the TCLF sector.

Threats

A number of enterprises in the TCLF sector maintain expensive credits for updating their operations and for overdrawing their accounts. The dependency on imports for raw materials (fabric, leather, etc.) and accessories, make the TCLF sector vulnerable to the economic uncertainties of their partners and suppliers. For this reason, the lack of production of fabrics and the insufficient supply of leather make enterprises dependent on their supply chains and it reduces the potential for innovation. Competition from industries in Asia, Turkey, as well as some other countries in the Balkan Region, serve as another threat to the TCLF sector in Albania.



Summary of the SWOT Analysis

In the following table the main strengths, weaknesses, opportunities, and threats of the textile, clothing, leather, and footwear sectors have been presented.

STRENGTHS

- Large global market for apparel and footwear
- Strong political commitment
- Good geographical coverage of the regions that attract a local work force
- Demonstrated flexibility and a high degree of adaptability to changes in the sector
- Competitive costs of labour force, energy, and transport costs as compared to other countries in the region
- Proximity to EU markets and improved transport links
- Regulatory framework for custom and VAT
- Language skills of population, (English, Italian, Greek and German)
- Good academic education: the Polytechnic University of Tirana and its Physical, Mechanical, and Chemical Laboratory is the only one within the TCLF sector with extensive experience and longstanding expertise in research, testing, and analysis within the TCLF sector
- A network of vocational training centres exists in the main

WEAKNESSES

- Impact of COVID-19 on working conditions/unsafe working conditions
- Lack of access to promotion opportunities and skills development
- Long working hours, including weekends
- Limited access to financing and investment funds
- Lack of own product brands and sales networks within foreign markets
- Low value-added activities
- Low labour productivity
- Lack of product design and marketing and managerial capacities
- Slow VAT reimbursement
- Long delays to clear imports and exports at customs compared to other western Balkan countries
- Lack of horizontal cooperation among domestic enterprises and of organization within the TCLF sector
- Lack of inventory control systems and electronic data interchange presence
- Strong focus on Make and Trim as a business model
- Low energy efficiency of the TCLF sector
- Low material efficiency

OPPORTUNITIES

- Integration into the EU and EU markets
- Increasing interest of foreign investors in the Albanian manufacturing sector
- Growing awareness of and interest in internal cooperation within the TCLF industries
- Increasing attention to public-private cooperation
- Improvement of sector data and research
- Important public investments in infrastructure and regional development
- Maturity in forming long-term vision approach
- National policies; approving sectorial and cross-cutting national strategies for national development to industry, labour market, and employment promotion interventions
- Support from the Government to enhance the skills of the labour force through VET programmes
- Support to gender-responsive, technical innovations/ upgrading as part of greening the TCLF sector
- Growing requests for eco-labels and other conformity certifications or customer demands

THREATS

- A number of firms maintain expensive credits for updating their operations and overdrawing their accounts
- Dependency on imports for raw materials; vulnerability to partners' economic situation
- Competition from Asian countries, some very competitive regional countries (i.e. Turkey), and also some other Balkan countries as well

6 ACTION PLAN FOR ACHIEVEMENT OF THE ZERO DRAFT ROADMAP OBJECTIVES

OBJECTIVE 1

Address the quality dimensions of jobs in the TCLF sector (working conditions, productivity, occupational safety and health), including gender equality

Milestones / desired outputs

- The TCLF sector will contribute towards the progress of the SDGs and the UN Agenda 2030
- Progress achievement towards SDG Goal 5 and Goal 8
- TCLF sector made aware of the benefits of systematically applying a SCORE assessment

Activities	Stakeholders	Timeline	Goals	KPIs
1.1 Leverage/ Promote international human/labour rights in the TCLF sector	ProExport, trade unions, ILO, NGOs (Sector and enterprise level intervention)	Mid-term	8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small-and medium-sized enterprises, including through access to financial services 8.8: Protect labour rights and promote safe and secure working environments for all workers, including migrant workers, in particular women migrants, and those in precarious employment	Number of participants in the awareness-raising campaigns; Number of workshops;
1.2 Establish workplace cooperation procedures, safe complaint mechanisms, and workplace committees	ProExport, trade unions, ILO (Sector and enterprise level intervention)	Mid-term	8.5: By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value	
1.3 Conduct training programmes for managers and supervisors, and worker awareness programmes to eradicate labour rights violations in the workplace	ProExport, trade unions, ILO (Sector and enterprise level intervention)	Mid-term	8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small-and medium-sized enterprises, including through access to financial services 8.8: Protect labour rights and promote safe and secure working environments for all workers, including migrant workers, in particular women migrants, and those in precarious employment	
1.4 Formalise and reactivate occupational safety and health committees within the TCLF sector; formalize the establishment of policies, procedures, and prepare guidelines on how the committees will operate	ProExport Albania; trade unions; ILO; TFLC enterprises (Enterprise level intervention)	Mid-term	8.8: Protect labour rights and promote safe and secure working environments for all workers, including migrant workers, in particular women migrants, and those in precarious employment	Number of OSH trainings conducted; Number of enterprises in the TCLF sector formalising the OSH Committees;
1.5 Create an OSH Guideline system for the TCLF sector based on the ILO code of practice "Safety and health in textiles, clothing, leather and footwear"	National Agency for Employment and Skills; ProExport Albania; trade unions, ILO (Sector level intervention)	Short-term	8.8: Protect labour rights and promote safe and secure working environments for all workers, including migrant workers, in particular women migrants, and those in precarious employment	The OSH guideline system for the TCLF sector in Albania

<p>1.6 Improve reporting, recording and notification of work-related injuries and accidents</p>	<p>ProExport Albania; trade unions; ILO; State Labour and Social Services Inspectorate; enterprises of the TCLF sector (Sector and enterprise level intervention)</p>	<p>Short-term</p>	<p>8.8: Protect labour rights and promote safe and secure working environments for all workers, including migrant workers, in particular women migrants, and those in precarious employment</p>	<p>The reported number of registered work injuries and accidents, illnesses, health outcomes</p>
<p>1.7 Promote social dialogue between the Government, employers' organizations and workers' organizations</p>	<p>National Agency for Employment and Skills; National Agency for VET and Qualifications; ProExport Albania; trade unions, ILO</p>	<p>Mid-term to long-term</p>	<p>8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small-and medium-sized enterprises, including through access to financial services 8.5: By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value</p>	<p>Set of recommendations for the improvement of the existing vocational training programmes that would serve the TCLF sector</p>
<p>1.8 Take steps to strengthen existing relevant national policies and laws where necessary in dialogue with employers' and workers' organizations to ensure inclusion of informal worker priorities and needs (with a special emphasis on contracting procedures, documentation, and obligations). Collaborate with the General Tax Directorate to facilitate a declaration of full time and seasonal workers for social security purposes.</p>	<p>State Labour and Social Services Inspectorate, National Agency for Employment and Skills; National Agency for VET and Qualifications; Biznes Albania, ProExport Albania; trade unions, ILO (Sector intervention)</p>		<p>8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small-and medium-sized enterprises, including through access to financial services 8.5: By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value</p>	<p>Two peer learning events aimed at identifying the best approaches to deal with informal workers.</p>
<p>1.9 Upgrade VET education for value added processes (CAD/CAM; pattern making; productivity increase; etc.)</p>	<p>National Agency for Employment and Skills; National Agency for VET and Qualifications, ProExport, enterprises of the TCLF sector, PUT, UNIDO, ILO</p>	<p>Mid-term</p>	<p>9.5 Enhance scientific research, upgrade the technological capabilities of industrial sectors in all countries, in particular developing countries, including, by 2030, encouraging innovation and substantially increasing the number of research and development workers per 1 million people and public and private research and development</p>	<p>Number of training programmes; Number of assisted enterprises; number of trainees</p>

OBJECTIVE 2

Promote sustainability and efficiency within enterprises as common practice in the TCLF sector in Albania

Milestones / desired outputs

- TCLF sector aware of the benefits of systematically applying the RECP methodology and a conceptual design of new investments
- Well-developed supply and demand for RECP and SCORE assessment methodologies within the TCLF sector
- Qualified RECP and SCORE service providers
- VET institutions; capacity building at universities and of their graduates (e.g., updated curricula)
- Progress achievement towards the SDGs, ESG, and partnerships

Activities	Stakeholders	Timeline	Goals	KPIs
2.1 Working group identification; Memorandum of Understanding (MoUs) among stakeholders	All stakeholders	Mid-term	<p>12.1 Implement the 10-Year Framework of Programmes on Sustainable Consumption and Production Patterns, all countries taking action, with developed countries taking the lead, taking into account the development and capabilities of developing countries</p> <p>8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small-and medium-sized enterprises, including through access to financial services</p> <p>8.5: By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value</p> <p>8.8: Protect labour rights and promote safe and secure working environments for all workers, including migrant workers, in particular women migrants, and those in precarious employment</p> <p>8.9: Protect labour rights and promote safe and secure working environments for all workers, including migrant workers, in particular women migrants, and those in precarious employment</p> <p>SDG 9.4 Energy intensity</p>	Number of working groups; number of MoUs signed; number of members in each working group
2.2 Effective application of the SCORE and RECP methodologies; to include awareness-raising activities and dissemination through workshops and trainings	Council of Ministers, Ministry of Energy, Ministry of Economy, ProExport Albania, INSTAT, PUT, Directorate of Standards, tax office, UNIDO, ILO	Mid-term	<p>8.3: Promote policies that support resource productivity, circularity and especially energy efficiency, , decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small-and medium-sized enterprises, including through access to financial services</p> <p>8. 4. Develop the Polytechnic University of Tirana into a hub for resource efficiency in the target sectors, introduce RE in curricula, provide continuous knowledge management and continuous education to the academic staff</p> <p>Upgrade research facilities to support material selection, material use, and recycling in industries</p> <p>8.5: By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value</p> <p>12.8 By 2030, ensure that people everywhere have the relevant information and awareness for sustainable development and lifestyles in harmony with nature zero carbon emissions by 2050</p> <p>12.2: By 2050, achieve zero carbon emission from industries, and 30% circularity</p> <p>12. 3. Increase resource productivity</p>	<p>RECP policy instruments approved; RECP center of excellence established at the Polytechnic University of Tirana, jointly with ProExport;</p> <p>SCORE materials adjusted to the local circumstances; number of enterprises participating in the events and the RECP technical assistance studies; number of enterprises reached by promotional materials and other dissemination activities; number of new RECP and SCORE applications; number of workshops with regional administration and enterprises</p>

<p>2.3 Legislation improvement: Amendment of all laws, sub-laws, and decisions of the Council of Ministers mentioned in the text and annex of the stocktaking paper</p>	<p>Council of Ministers, Ministry of Tourism and Environment, Ministry of Finance, Ministry of Entrepreneurship, UNIDO, ILO</p>	<p>Short-term to long-term</p>	<p>8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small-and medium-sized enterprises, including through access to financial services 8.5: By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value</p>	<p>Implementation of the 3Rs and energy efficiency audits into national legislation; formal support, e.g. via grants for recycling and renewable energy installations</p>
<p>2.4 Formal acknowledgement and monitoring of qualified RECP service providers (consultants), as well as certification of SCORE trainers to ensure the quality of their service provision</p>	<p>Ministry of Energy, Ministry of Economy, ProExport Albania, PUT, INSTAT; Agency for Research, Technology and Innovation; UNIDO, ILO</p>	<p>Short-term to Mid-term</p>	<p>8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small-and medium-sized enterprises, including through access to financial services 8. 4. Develop the Polytechnic University of Tirana into a hub for resource efficiency in the target sectors, introduce RE in curricula, provide continuous knowledge management and continuous education to the academic staff 12.a Support developing countries to strengthen their scientific and technological capacity to move towards more sustainable patterns of consumption and production</p>	<p>Database of qualified SPs, number of qualified SPs Number of certified SCORE trainers</p>
<p>2.5 Introduction of RECP methodology and SCORE training programme in the VET programmes and tertiary-level education curricula relevant to the TCLF sector</p>	<p>Ministry of Education, Youth and Sports, PUT; Polytechnic University of Tirana, VET Institutions, Agency for Research, Technology and Innovation, UNIDO, ILO</p>	<p>Short-term</p>	<p>12.8 By 2030, ensure that people everywhere have the relevant information and awareness for sustainable development and lifestyles in harmony with nature 12.a Support developing countries to strengthen their scientific and technological capacity to move towards more sustainable patterns of consumption and production</p>	<p>VET programmes and tertiary-level education curricula updated with RECP and SCORE; updates included in the new year's academic plan</p>
<p>2.6 Enhance the capacities of enterprises of the TCLF sector so they're able to apply internal audit & control procedures based on the high-level management model of the ISO management system standards. This will help enterprises to better manage all of their resources, and not only energy.</p>	<p>Ministry of Energy; ILO; Enterprises of the TCLF sector</p>		<p>SDG 9.4 Energy intensity, zero carbon emissions by 2050 12.2: By 2030, achieve the sustainable management and efficient use of natural resources</p>	<p>Number of trainings; number of enterprises that have implemented ISO 14001, ISO 50001, and low-level environmental management systems; savings (resources, energy, and costs)</p>
<p>2.7 Vocational trainings on energy audit and efficient use of resources</p>	<p>SPs, Ministry of Energy, National Agency for Employment and Skills; National Agency for VET and Qualifications, ILO, UNIDO</p>	<p>Short-term to Mid-term</p>	<p>SDG 9.4 Energy intensity, zero carbon emissions by 2050</p>	<p>Number of trainings; number of trainees</p>
<p>2.8 Development of an energy audit scheme</p>		<p>Mid-term to long-term</p>		<p>Existence of an energy audit scheme</p>

OBJECTIVE 3

Upgrade the capabilities for economic growth, competitiveness, and sustainable production and consumption

Milestones / desired outputs

- TCLF sector will benefit from the RECP and SCORE Training, expertise, and interventions towards more sustainable production, competitiveness, economic growth, and a decent workplace; sustainable consumption and production patterns
- Progress achievement towards the SDGs and ESG

Activities	Stakeholders	Timeline	Goals	KPIs
3.1 Work with the Government, employers' associations, investors and brands/buyers to develop and implement gender-responsive policies, plans and investments to promote green jobs, green skills and the greening of production, and support the transition to circularity.	National Agency for Employment and Skills; Pro-Export Albania; trade unions, ILO	Long-term	8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services 8.8: Protect labour rights and promote safe and secure working environments for all workers, including migrant workers, in particular women migrants, and those in precarious employment 12.2: By 2030, achieve the sustainable management and efficient use of natural resources	Training on product design, marketing, new materials, new techniques, financing, and material recycling
3.2 Support enterprises in conducting self-assessments aimed at: improving productivity; human resources capabilities; efficient usage of resources; cost; quality	Enterprises of the TCLF sector, ProExport Albania, service providers, tax office; INSTAT, UNIDO, ILO	Mid-term	SDG 8.4, Material intensity, 100% recycling of PE fibres and cotton fibres by 2040 Goal 12.4, Goal 8.8; zero use of hazardous chemical according to ZDHC by 2040; 8.2 Achieve higher levels of economic productivity through diversification, technological upgrading and innovation, including through a focus on high-value added and labour-intensive sectors; Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises 8.5.2 Unemployment rate, by sex, age and persons with disabilities 8.8.2 Level of national compliance of labour rights (freedom of association and collective bargaining) based on International Labour Organization (ILO) textual sources and national legislation, by sex and migrant status	Number of enterprises evaluated; volume of production; number of clothing styles and new models per month; percentage of defects; return rate; number of clients; number of direct operators; number of indirect operators; rate of leave/absenteeism; cut-ship ratio; amount of waste (raw material, accessories); total standard hours for production; total work hours, including extra hours; cost per standard hour (Euro); standard hours charged to client (Euro); average defects per unit "in line"; average defects per unit "end of the line"; international standards applied in enterprises; OSH standards and procedures applied; number of enterprises shifting from a lower business model to a higher one; number of enterprises sourcing raw material; number of enterprises applying sound waste management principles; number of projects applying the 3Rs (reuse, redesign, and recycling); number of enterprises working with organic materials (change); number of enterprises asking for material consumption monitoring or doing it themselves; number of agreements between clients and producers for water, material, and/or carbon footprinting
3.3 Capacity building and knowledge dissemination	ProExport, enterprises of the TCLF sector, PUT, schools, UNIDO, ILO	Mid-term	9.5 Enhance scientific research, upgrade the technological capabilities of industrial sectors in all countries, in particular developing countries, including, by 2030, encouraging innovation and substantially increasing the number of research and development workers per 1 million people and public and private research and development	Number of workshops; number of trainees in the workshops

3.4 Progress in RECP and SCORE implementation by the enterprises in the TCLF industries

ProExport, enterprises in the TCLF sector, UNIDO Mid-term to long-term

8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small-and medium-sized enterprises, including through access to financial services
 8.5: By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value
 8.8: Protect labour rights and promote safe and secure working environments for all workers, including migrant workers, in particular women migrants, and those in precarious employment
 12.2: By 2030, achieve the sustainable management and efficient use of natural resources

Number of enterprises reporting; number of KPIs evaluated and monitored; reduction of product related energy consumption; carbon footprint (required by key international clients); percentage of recycled material used; percentage of recycled waste

OBJECTIVE 4

Ensure technology upgrades and innovation

Milestones / desired outputs

- Manufacturing enterprises in the textile, clothing, leather, and footwear industries will benefit from technology advancement, along with innovation projects implemented in their enterprises for more resilient production
- Progress achievement towards the SDGs and ESG

Activities	Stakeholders	Timeline	Goals	KPIs
4.1 Adapt benchmarking strategies and methodologies to understand how the enterprises operate and, among others, recommend the implementation of BATs through benchmark identification within the TCLF sector	ProExport, enterprises of the TCLF sector, ILO, UNIDO	Long-term	9.2.1 Manufacturing value added as a proportion of GDP and per capita 12.2: By 2030, achieve the sustainable management and efficient use of natural resources	Benchmarks identified in the TCLF sector for technology and innovation; number of visits
4.2 Promote and support the application of environmental sustainability tools	ProExport, enterprises of the TCLF sector, ILO		12.2: By 2030, achieve the sustainable management and efficient use of natural resources	Partnership with selected initiatives like the Higg Index are established
4.3 Provide technical support to enterprises in the TCLF sector to develop the technical and financial means to implement the RECP methodology and the SCORE Programme, respectively	ProExport, enterprises of the TCLF sector, UNIDO	Long-term	9.5 Enhance scientific research, upgrade the technological capabilities of industrial sectors in all countries, in particular developing countries, including, by 2030, encouraging innovation and substantially increasing the number of research and development workers per 1 million people and public and private research and development	Number of enterprises supported; number of feasibility studies; number of visits
1.3 Support demonstration of integrated value chain design 1.3.1 Coordinate donors 1.3.2 Select important measures, 1.3.3 support pilot implementation, 1.3.4 monitor activities (recycling plants)	Donors, UNIDO, ILO	Short-term to mid-term	Goals 9.2, 9.3, develop 10 integrated textile enterprises	number of donors involved; number of measures identified; number of pilot projects Number of monitoring activities conducted

4.4 Develop guidelines for the selected important focus areas in the TCLF sector	ProExport, enterprises of the TCLF sector, UNIDO	Mid-term	9.a Facilitate sustainable and resilient infrastructure development in developing countries 9.b Support domestic technology development, research and innovation in developing countries, including by ensuring a conducive policy environment for, inter alia, industrial diversification and value addition to commodities	Number of identified key areas for enterprises within the textile, clothing, leather, and footwear industries; guidelines developed; number of new semi-automatic and automatic machines purchased by the enterprises; targeted RECP presentations for the sectors with national examples, international models, webinars, conferences, and webpages; dissemination materials distributed; number of enterprises contacted
4.5 Promote green certification for the enterprises in the TCLF sector	ProExport, enterprises of the TCLF sector, Directorate of Standards, UNIDO	Mid-term to long-term	12.8 By 2030, ensure that people everywhere have the relevant information and awareness for sustainable development and lifestyles in harmony with nature	Number of green certifications and agreements

OBJECTIVE 5

Facilitate access to new markets and improve consumer behaviour

Milestones / desired outputs

- Albania will benefit for a better image towards SDGs progress and the UN Agenda 2030
- Albanian manufacturing sector will benefit from a more competitive industry globally, especially within the EU
- Progress achievement towards the SDGs and ESG

Activities	Stakeholders	Timeline	Goals	KPIs
5.1 Support enterprises in the TCLF sector on how to embrace best practices and how to implement them through participation in different activities (raw material sourcing, new clients etc.)	ProExport, enterprises of the TCLF sector, PUT, UNIDO, ILO	Short-term to mid-term		Number of participants at trade fairs; number of enterprises attending B2B events; number of enterprises applying for ISO standards or other standards; number of enterprises with new suppliers
5.2 Increase consumer awareness of the circular economy, eco –design, recycling, reuse, and redesign	ProExport, UNIDO, ILO, NGOs, Balfin Group, donors, PUT, vocational schools;	Mid-term	12.2 By 2030, achieve the sustainable management and efficient use of natural resources 12.2.1 Material footprint, material footprint per capita, and material footprint per GDP 12.2.2 Domestic material consumption, domestic material consumption per capita, and domestic material consumption per GDP	Number of workshops; number of international brands in Albania participating
5.3 Support creative designers through master classes and awards	VET schools and centers, PUT, UNIDO, ILO	Short-term	12.5 By 2030, substantially reduce waste generation through prevention, reduction, recycling and reuse	
5.4 Leverage public sector procurement	National Agency for Public Procurement; ProExport Albania; university and certified laboratory for testing, ILO, UNIDO, enterprises of the TCLF sector	Mid-term to long-term	12.4 By 2020, achieve the environmentally sound management of chemicals and all wastes throughout their life cycle, in accordance with agreed international frameworks, and significantly reduce their release to air, water and soil in order to minimize their adverse impacts on human health and the environment	Number of green public procurement instances; number of testing reports from the Laboratory of Physical – Mechanical and Chemical of Textile and Leather at PUT, for green materials; green public procurement calls

Way Forward

On the basis of the Zero Draft Roadmap, the identified stakeholders will continue to be in an evaluation process inviting them to agree on implementation of concrete objectives relevant to their own respective agendas and possible contributions to national policies. After endorsement of the Zero Draft Roadmap and agreement of the specific actions for each area, the Action Plan will ensure achievement of the goals identified in the process of the Zero Draft roadmap development. The following activities are to be considered in this regard:

1. Establishing the working groups for the concrete objectives of the Action Plan
2. Implementation of the Action Plan to achieve the specified Zero Draft Roadmap objectives (indicating who, when, what and with which resources will implement the identified activities) for each stakeholder or group of stakeholders

Implementation of the Action Plan would require establishment of the Monitoring and Reporting framework to ensure close evaluation of the progress in the activity implementation and achievement of the established objectives at all levels of intervention: macro, medium and micro. In particular, this phase will foresee close collaboration with businesses through regular visits to the enterprises for measuring the KPIs; monitoring the progress of the enterprises towards the RECP methodology implementation; regular reporting and lessons learned identification; improvements and/or modifications of the concrete steps; and attending different activities as proposed in the Action Plan. Dissemination of the knowledge and success stories achieved will be important: these would be conducted through workshops, regular reports, and communication and visibility activities to ensure involvement of a wider audience into the process as well as to increase transparency of the associated decisions.

Conclusions

The Zero Draft Roadmap is a strategic document. It lays out an action-oriented framework focused on the areas where concerned stakeholders can take actions to achieve the agreed-upon objectives. The proposed activities need high-level decision makers' orientation and support to facilitate their implementation and an effective coordination and cooperation between the relevant stakeholders. The common challenges for scaling-up an efficient use of resources that have the highest potential to act against the desired developments are a lack of awareness and a lack of finance. Accordingly, the activities proposed in this regard have the priority to be implemented. The relevant stakeholders from both the public and private sectors as well as support institutions, experts and academia are to show their ownership and commitment to cooperate and effectively participate in implementing the activities proposed in the roadmap. However, they need to have the support of their top management to include these objectives and activities in their strategies and action plans for years to come in order to be able to allocate the needed resources and time for the planned actions. Unsustainable production and consumption is the common thread between the triple-faceted planetary crisis of climate change, nature loss, and pollution. Therefore, all efforts must be made to transform the textile value chain towards sustainability and circularity, where it should act as a crucial lever for an overall transformation to a circular economy.



Key Activities According to Sustainable Development Goals (SDGs)

Key activities	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	
Investment in greener and environmentally friendly companies		●							●			●	●					●
Productivity increase through resource efficiency and cleaner production tool								●	●			●						
Impact of air and climate technology processes									●			●	●					●
Products safety to EU standards		●	●						●				●					●
Raw materials and sourcing								●	●			●				↻		
Water consumption			●			●			●			●						●
Industry waste management			↻				↻	↻	●			●	●		●			↻
Energy consumption							●	●	●				↻					
Access to new markets and improving consumer behaviour			●	●								●						●
Greenhouse gas emissions							●		●			●	↻					●
Employee welfare					↻			●		↻		●						●
Social engagement			●	●								●					↻	●

● Direct Link ↻ Indirect Link

Annex

Tools for the Zero Draft Roadmap-inspired actions implementation

The Sustainable Development Goals are the global call to action to end poverty, protect the earth's environment and climate, and ensure that people everywhere can enjoy peace and prosperity. There are important tools for achieving the SDGs and their associated KPIs. Those tools include approaches and methodologies developed by individual countries and international organizations alike. In particular, the Sustaining Competitive and Responsible Enterprises (SCORE) Programme supports the TCLF sector to improve working conditions and processes, particularly by mainstreaming gender, promoting decent work, and achieving cleaner and more sustainable production patterns; the Swedish model promotes the transition from a linear mode of production to that of a circular one; and the Resource Efficient and Cleaner Production methodology of UNIDO allows for a smooth execution of actions to increase the efficient use of resources along the production process and the associated supply chain.

The Swedish model

Swedish fashion aims to go from linear to circular production, where materials are not discarded after use, but instead recycled or used in other ways so that the waste is kept to a minimum.

New business models are currently being explored, often based on a radical redefinition of what the term 'fashion' constitutes.

A long-term perspective

Traditionally, fashion has been defined by change and a desire for constantly new designs. Now, enterprises also work actively to make sure that their garments last longer, even though it might mean they make less money on their products from a short-term perspective. To speed up progress, many brands have started to collaborate to find solutions and share their knowledge.

At The Swedish School of Textiles – part of the University of Borås – there are several promising research programmes in the field of textiles and fashion. Among them, Smart Textiles is about exploring new ways to use technology, such as developing technology to recycle and reuse textile fibres.

The ArcInTexETN programme is a cross-disciplinary, European training network (ETN) aiming to connect architecture, interactive design, and textiles to develop more sustainable forms of living.

Long-lasting garments

Filippa K is one of the sustainability pioneers among Swedish brands. Since 2014, the brand has operated by the motto that 'sustainability leads the way to growth', with the lifespan of its garments as a primary focus. In 2015, Filippa K launched a new concept, the collect programme, whereby people get a discount on new purchases if they return garments they no longer want. By 2030, the brand aims to remake, resell or recycle 100 percent

of collected garments.

Houdini Sportswear has managed to turn more than half of its products circular – by prolonging the life of garments, as well as by offering repairs, rentals and second-hand sales. The brand has also conducted an experiment in which their clothing is composted into food soil.

Ever heard of the Swedish saying 'There is no bad weather, only bad clothing'? A good starting point for a Swedish rainwear brand, right? Stutterheim is in the business of slow fashion, making durable, high-end raincoats with timeless design. Stutterheim is in the business of slow fashion, making durable, high-end raincoats with timeless design.

A long life also comes in the shape of wool. A New Sweden, founded in 2017, builds its brand around locally sourced materials and collaborates with farmers for its supply of wool. The company's clothes contain no plastics, and 100 percent of its garments are biodegradable.

Repairing the old

Gothenburg-based Nudie Jeans is committed to a strict code of conduct, which means that the brand only works with a carefully selected group of suppliers, demanding that they continuously supply Nudie Jeans with reports, action plans, and certifications. The company also repairs people's old Nudie jeans so they don't have to buy new ones, which challenges the idea that fashion should always be defined in relation to what is new and in style.

Nimble Patch is another example of circularity. The company's business idea is to make children's jeans live longer. This is done by collecting old, ripped jeans, then redesigning and reinforcing them – and finally selling them again.

Made to order

Technology also has an important role to play in the green transformation of fashion. Atacac is a fashion-tech start-up based in Gothenburg that makes clothing digitally. Garments are made to order – that way, over-production is avoided. The company's vision is to reinvent fashion by combining new technology with art and traditional craftsmanship.²⁹

Actions for reaching sustainable products

Key EU actions for circular and sustainable product design to reduce products' environmental impact include:

- improve product sustainability information for consumers and supply chain actors
- prevent destruction of unsold consumer products
- promote more sustainable business models
- increase green public procurement

²⁹ <http://sweden.se/hej/Suedi:t%e6%8c%96%20drejtag%20e%20vot%e6%8c%96%20s?>

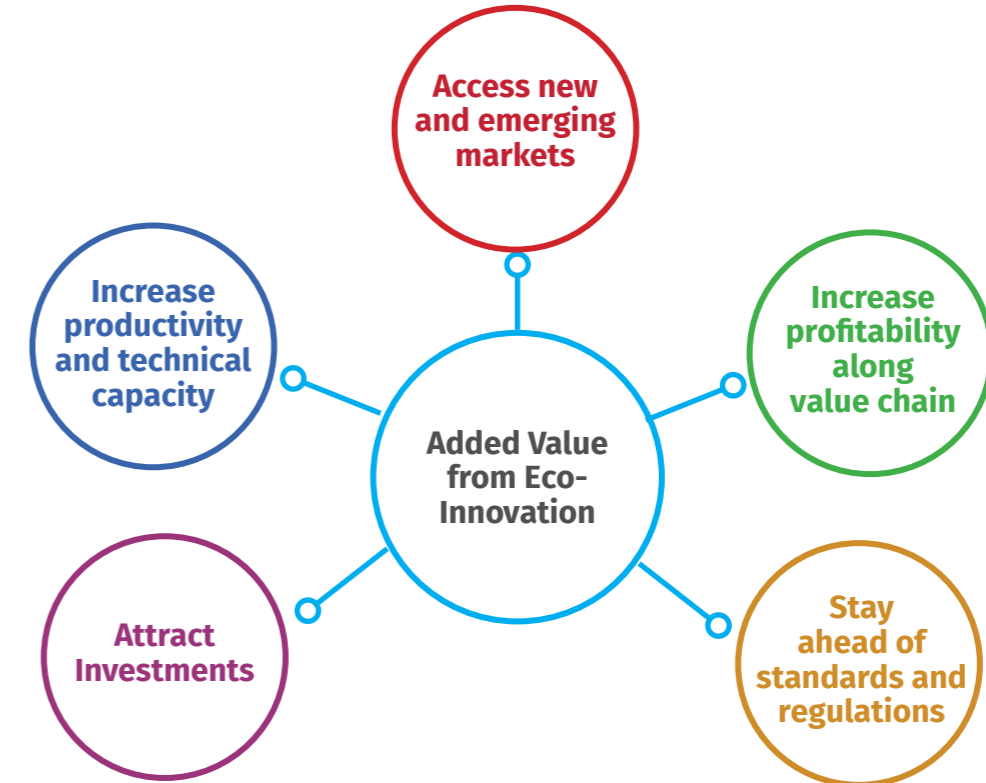
The proposed Ecodesign for Sustainable Products Regulation is the cornerstone of the Commission's approach to more environmentally sustainable and circular products. It is based on, and will replace, the current Ecodesign Directive 2009/125/EC, which has driven improvements in energy efficiency and circularity of energy-related products for over a decade. Until this happens, the existing directive will continue to operate, including by implementing the new Ecodesign and Energy Labelling Working Plan 2022-2024, which was adopted on 30 March 2022.

By making sustainability the core of a business strategy, the concept of eco-innovation can support small and medium-sized enterprises to become more resilient. Thinking from a life cycle perspective means considering all phases of the product life cycle, from extraction of raw materials through material processing, manufacturing, distribution, use, repair and maintenance to disposal or re-use.

1. Strategies to decouple economic growth from environmental degradation and achieve greater resource efficiency
2. Accomplishing more with less across the entire life cycle of products
 - Materials recycling and recycling processes;
 - Water efficiency, treatment, and distribution;
 - Sustainable product design;

- New business models that include repair, sharing, and reusing to increase the useful life of products.
- Kapërcimi i hendekut midis kërkimit dhe tregut
- 3. Bridging the gap between research and the marketplace
- 4. Offset strategies for the enterprises for building business success and competitive advantages
- 5. Requires the creation of favourable conditions structured at two levels of interventions:
 - **At the national level** – framework conditions for eco-innovation (macroeconomic policies, regulatory environment, clear strategy and targets to address societal needs, and a strong promotion of sustainable consumption and production practices).
 - **At the market level** - a mix of market-based instruments can be designed for eco-innovation, with demand measures (regulations and standards, public procurement and demand support, technology transfer, etc.) and supply side measures (equity support, research and development (R&D), education and training, networks and partnerships, provision of infrastructure, etc.)

Figure 5. Added value from eco-innovation - an overview of the business drivers



³⁰ (https://ec.europa.eu/info/energy-climate-change-environment/standards-tools-and-labels/products-labelling-rules-and-requirements/sustainable-products/about-sustainable-products_en)

³¹ <https://www.unep.org/eco-innovation>

Best Available Techniques (BAT) are understood to mean the most effective and advanced stage in the development of industrial activities and their methods of operation, designed to prevent and, where that is not practicable, to reduce emissions and the impact on the environment as a whole (OECD, 2017³²). BATs aim to achieve a high level of protection of human health and the environment.

Sustaining Competitive and Responsible Enterprises (SCORE)

The Sustaining Competitive and Responsible Enterprises (SCORE) Programme of the International Labour Organization (ILO) supports the vision of the Sustainable Development Goals for a better, more inclusive world. Aligning with Goal 5, 8, 9, and 12, SCORE Training helps SMEs improve working conditions and processes, particularly by mainstreaming gender, promoting decent work, achieving cleaner and more sustainable production patterns, and enabling SMEs to participate in global supply chains. The programme was launched in 2009 and is managed by a global team based in ILO Country Offices and Headquarters. The key intervention of the programme is SCORE Training, which combines practical classroom training with in-factory consulting. The training comprises four modules on workplace cooperation, 1) quality management, 2) industrial engineering techniques to improve productivity and drive clean production, 3) human resource management, and 4) occupational safety and health at the workplace.

The ILO is assisting government agencies, training providers, business associations and trade unions in about 20 countries to offer SCORE Training to SMEs.

The ILO implements the programme using a three-tiered structure comprising expert trainers, trainers and the end beneficiaries – SMEs. The expert trainers licensed by the ILO are responsible for developing the capacity of the national trainers to effectively conduct SCORE Training for SMEs. Thereafter, the trainers train SMEs in SCORE modules. The ILO plays a critical role in identifying and disseminating best practices, carrying

out trainings, monitoring activities, performing quality control, and providing technical advice on the implementation of the SCORE Programme.

The SCORE Programme could pave the way for UNIDO to conduct the Resource Efficient and Cleaner Production (RECP) assessments on the trained textile and footwear enterprises.

Resource Efficient and Cleaner Production (RECP)

Providing hands-on experience and advanced training on application of the RECP methodology to professional trainees and enterprises staff demonstrates the benefits and opportunities for enterprises. It presents the principles of Resource Efficient and Cleaner Production as a preventive approach to reduce waste and emissions from industry by integrated measures. These measures, at the same time, have the potential to reduce the consumption of materials and energy and thus reduce cost. The participants will learn the working method step by step, describing the production process, identifying sources of waste and emissions, understanding the root causes, and developing organisational and technical measures for improvement. The methodology assumes the following core interventions:

- Training and coaching of experts and enterprises staff on efficient use of resources
- The skills obtained by national experts allow them to conduct RECP assessments in clothing and footwear enterprises, with a deep understanding of the RECP principles, practices, and method, to improve resource efficiency, reduce environmental impacts, and save costs to the enterprises.

Clothing and footwear enterprises develop a basis to undertake feasible RECP measures to reduce costs and environmental impacts, while also increasing awareness, understanding, and the motivation to adopt RECP as a continuous business practice beyond the project duration.



³²<https://www.oecd.org/chemicalsafety/risk-management/value-chain-approaches-to-determining-best-available-techniques-industrial-installations.pdf>



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