

YOUR SUCCESS



JOB MATCHING SERVICES IN KOSOVO

MARCH 2016

Jon Burns, Ph.D.



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EYE - Enhancing Youth Employment is a Swiss Agency for Development and Cooperation (SDC) project implemented by Helvetas Swiss Intercooperation and MDA-Management Development Associates. It supports employment opportunities of young women and men graduates from schools and universities by facilitating their transition into the labour market. The project addresses three sides of the labour market by focusing on relevant and feasible sectors (such as ICT and Agro); in skills development meeting the demands of employers, improvement of job matching services and job creation through better private sector investment. The first phase of the project runs from January 2013 to December 2016.

TABLE OF CONTENTS

LIST OF ABBREVIATIONS,	6
1. EXECUTIVE SUMMARY,	7
2. INTRODUCTION TO THE CASE STUDY,	9
3. ANALYSIS OF THE JOB MATCHING SERVICE MARKET,	10
3.1. Mapping the JMS market system,	10
3.2. Identifying root causes in the JMS market system,	11
3.3. Prioritising opportunities in the JMS market system,	11
SUMMARY ON UNDERSTANDING THE JMS MARKET SYSTEM,	12
4. STRATEGY,	13
4.1. A facilitative market systems development approach,	13
4.2. A definition of systemic change,	14
4.3. The strategic framework for the JMS intervention,	14
4.4. A hierarchy of objectives for systemic change,	15
SUMMARY ON STRATEGY,	16
5. ACTIONS TAKEN,	17
5.1. Identification of initial market players,	17
5.2. Stimulating market players to improve their performance,	17
BOX 1: ACTION – MAIN HIGHLIGHTS,	18
SUMMARY ON IMPLEMENTATION,	19
6. RESULTS ACHIEVED,	20
6.1. Partners adopting and experimenting with the business model,	20
6.2. Partners investing and enhancing the business model,	21
6.3. Business model mainstreamed in the market system,	21
BOX 2: BEHAVIOURAL CHANGES – SOME EXAMPLES,	22
6.4. Wider response to the business model,	22
SUMMARY ON RESULTS ACHIEVED,	25
7. LESSONS IDENTIFIED FOR WIDER CONSIDERATION,	26
7.1. Understanding a rapidly changing market system,	26
7.2. Integrating M&E system in the project design and implementation,	26
7.3. The role of communication and knowledge sharing,	27
7.4. Clarity of roles among project staff, co-facilitators and market actors,	27
7.5. When to phase out,	28

LIST OF ABBREVIATIONS

CGC	Career Guidance Centres
ICT	Information and Communications Technology
HR	Human Resources
HRD	Human Resources Development
HSI	HELVETAS Swiss Intercooperation
JMS	Job Matching Services
MDA	Management Development Associates
M&E	Monitoring & Evaluation
MEST	Ministry of Education, Science and Technology
MLSW	Ministry of Labour and Social Welfare
MSD	Market Systems Development
NGO	Non-governmental organization
OF	Opportunity Fund
PPP	Public-private partnerships
PES	Public Employment Service
SDC	Swiss Agency for Development and Cooperation
VET	Vocational Education and Training

1. EXECUTIVE SUMMARY

The Kosovo Enhancing Youth Employment (EYE) project of the Swiss Agency for Development and Cooperation (SDC) supports employment opportunities of young women and men, graduating from schools and universities, by facilitating their transition from formal education to work. The project is implemented by HELVETAS Swiss Intercooperation, together with Management Development Associates (MDA). The project addresses three specific elements of labour markets by focusing on relevant and feasible sectors, including Information and communications technology (ICT) and agro-processing; skills development meeting the demands of employers; improvement of job matching services (JMS); and job creation through better private sector investment. The first phase of the project started in June 2012 and will finish in December 2016.

In 2012, when the EYE project was being designed, Kosovo had the lowest employment rates in Europe. The labour force participation rate was decreasing, and youth unemployment was increasing. The long-term unemployment rate and the number of those unemployed for more than 12 months was also increasing. The number of Kosovars who were not in education, employment or training (NEET) was decreasing. The EYE project identified that the labour market in Kosovo was experiencing an oversupply of skills which did not match those required by private sector employers. The project also determined that JMS providers, although present in the market, were actually very basic on-line portals with no differentiated services.

Very few employers were using matching services of private JMS providers because of their limited presence and poor performance, and most employers were using print media to advertise vacancies. Additionally, employers (and job seekers) were starting to migrate from print to digital based services to reduce transaction costs. The development of the market was constrained by a lack of quality digital JMS providers, with assets including market awareness, sustainable business models, marketing strategies and services that matched market demand.

The first job portals appeared in the market in 2009. They operated sporadically and lacked sustainable and profitable business models. Following a thorough market analysis, the EYE project determined that job search engines had significant latent potential for growth and had the potential to become the main channels, through which young women and men would be able to access information about job vacancies. The diagnostic process revealed that awareness was low, among private sector employers, on the value of these job matching services and, accordingly, the willingness to pay for such services was almost non-existent.

Following a comprehensive identification and screening process, two nascent “job portals” were chosen to receive support in the form of business planning and product development facilitation. These JMS interventions have now supported new revenues streams, an increase in the demand for advertised job vacancies, a significantly larger number of jobseekers using job matching services, a greater number of businesses paying for the job matching services and, accordingly, a greater number of young people with a wider variety and larger number of employment opportunities.

The JMS intervention area¹ aims to support the enhancement of the market system offered by the private sector through the generation of innovative solutions which respond to an increasing demand for JMS. In particular, it focuses on sustainable business models for better services and on the development of support services and functions within the youth labour market. The JMS intervention has identified

¹All EYE project outcome and output areas can be seen at Annex 1 to this case study.

partners who are private JMS providers, in anticipation that they will create better access to job opportunities for young women and men in Kosovo.

At the end of 2015, under three years after the intervention started, the number of jobseekers using JMS, provided through two EYE market partners, has increased by 1,100%, their gross income has increased by 1,400%, the number of companies using their services has increased from zero (in 2013) to 36 and the number of job vacancies has increased by 200%. Around 26,000 people were facilitated to find full time employment through developed job matching services. Additionally, there was a continuous market reaction from other job portals entering the JMS market, increasing the number of active portals from two in 2012 to nine in 2015. The scale (breadth) of these changes was well illustrated in 2015, when the national government, for the first time, responded to the changes in the JMS market by drafting secondary legislation to enable the market to further grow and in preparation of public private partnerships (PPP) in JMS. In addition the government, in response to signs of unethical practices - and to ensure high standards among ethical players - are establishing a formal licencing system for JMS providers.

The case study reveals important lessons relevant to development stakeholders and practitioners involved in facilitating the improvement of different systems. First, in rapidly changing market systems, such as job matching services in Kosovo, market diagnosis should be iterative and adaptive and, ideally, be undertaken more frequently. Thus, good understanding of a rapidly changing market system is crucial. Second, intervening in interconnecting / intersecting markets brought synergy (contribution and aggregation). However, optimising project outcomes required very effective internal communications, including regular knowledge sharing events between those who were responsible for the various project interventions. Third, to avoid unnecessary barriers to progress, co-facilitators should be embedded into the project at the outset. This would help to ensure that innovations, skill and knowledge transfers and business models are relevant and well supported and it would help ensure the avoidance of early mistakes. Fourth, having a vision from the start to answer the question of “when to exit” is important. Continuation of intervention beyond addressing the main constraints has the risk of displacing or distorting other incentives or investments; and perhaps the presence of the project has become a “blocker of change” or has the potential to create ‘perverse incentives’ for more changes.

2. INTRODUCTION TO THE CASE STUDY

This case study outlines the rationale for the JMS intervention, describes the nature of JMS facilitation, assesses the JMS intervention impact and identify lessons learned, drawn from conclusions made. The intended outcome from this case study is wider learning and dissemination by explaining how JMS activities have resulted in long-term and large-scale changes. The study examines the relationship between JMS facilitative actions and changes in the job matching market system, and how this has contributed to a significant increase in employment opportunities for young women and men in Kosovo.

The case study is structured to guide and inform the reader based on the logical sequences of the “journey” that the JMS intervention has undertaken. This includes:

- The analysis and diagnostic work undertaken within the JMS market system;
- The strategy which has been adopted to address the constraints in the JMS market system and the resulting strategic framework and business model;
- The actions which were undertaken to deliver the strategic objectives;
- The results of actions taken, including changes in the market system; and
- Lessons learned, which are of wider relevance to the development community.

3. ANALYSIS OF THE JOB MATCHING SERVICE MARKET

This section focuses on the project's understanding of the JMS market system and how it affects young job seekers in Kosovo. It looks at how the project team undertook a diagnostic process that resulted in the identification of specific constraints.

The project design work identified that Kosovo's economy was not able to provide enough jobs for a rapidly increasing workforce. Up to 30,000 youths were entering the workforce every year. Demographics continue to suggest that this number will grow year-on-year. The level of recruitment by government had peaked and the private sector was not able to "plug" the employment gap. In order to understand the root causes of youth unemployment, the project design team undertook analysis of the youth labour market system, looking specifically into the interaction between the education and training systems and the youth labour market.

The three basic aims of the analysis were to:

1. Map the JMS market system structure and to understand its operation and dynamics in order to establish where the system is adversely affecting young job seekers;
2. Identify the root causes that prevent the JMS market system from serving young job seekers effectively; and
3. Decide which constraints are a priority.

3.1. MAPPING THE JMS MARKET SYSTEM

An objective of the analysis on job matching services was to understand the profile of young women and men jobseekers in Kosovo and their wider context, including the opportunities and the main drivers for changing the market system to increase employability. The results of the analysis identified that youth unemployment was two times higher than the unemployment rate of the remaining sectors of the working population. Young men and women did not have the requisite skills and/or the experience to fill vacant positions. Young women and men were facing barriers to finding jobs. There was an oversupply of certain (fashionable) skill profiles while often the skills sought, by the private sector, remained substantially undersupplied. Even when jobseekers had the right skill-sets, they are not necessarily identified by employers because of the non-existence, or poor performance, of appropriate matching and job search services.

Very few employers were using matching services. Most employers preferred to reach out to family and personal networks in order to find new employees. This phenomenon relates directly to cultural habits but also to the importance of informal employment, accounting for up to 40% of jobs, and the large share of small family businesses, accounting for 98.4% of Kosovar companies. Public sector matching services were viewed as inefficient, while those very few provided by the private sector were not providing services which addressed the latent market demand. These providers tended to copy print press advertisements and, accordingly, created no additional value in the market system for young job seekers.

The team identified that the prevalent job matching service providers in Kosovo were the Public Employment Service, four university career guidance centres; the daily print press (the largest matching services provider at the time); and web based, job search engines which represented a small but growing service area - job seekers using the job search engines were mostly young and skilled. The analysis also identified that, at the time, there was no recruitment agency in Kosovo. Recruitment,

The JMS market system was failing to serve the needs of young job seekers. The results of the analysis steered the project team towards a project design which would support the development of private job matching providers. The design was predicated on a need to develop the market through strengthening the private provision of job matching services to better meet the requirements of both the young job seeker and private employer.

human resources services and “head hunting” services were being provided on an ad-hoc basis by companies whose main business was consulting and advisory services. There were no temporary work agencies operating in Kosovo.

3.2. IDENTIFYING ROOT CAUSES IN THE JMS MARKET SYSTEM

The diagnostic process, linked to the analysis, distinguished symptoms of underperformance in the labour market from any root causes in the wider system. The project design team could then build on already completed analysis, allowing it to focus more specifically on the formulation of intervention strategies.

Figure 1 illustrates the symptoms and root causes of the JMS market system. The diagnostic process aimed to prioritise the constraints to be addressed; identified system level constraints that prevented the system from working efficiently; mapped how the market system structure, dynamics and operations affected young women and men job seekers; and verified that the selected market system (JMS) would improve the conditions faced by young job seekers.

The process further identified the disadvantages faced by the young Kosovar job seeker and then proceeded to undertake a deeper analysis, in order to explain the continued existence of these disadvantages. The analysis of the EYE project showed that the underlying cause for underperformance was lack of support services to job matching providers for positioning, profiling and marketing through the development of demand based and value adding services. Services were constrained by a lack of quality providers, including market awareness, sustainable business models and marketing strategies. Improvement in these areas would increase awareness of the benefits of job matching services to young job seekers (their needs and behaviour) and to private employers (meeting skills and types of work).

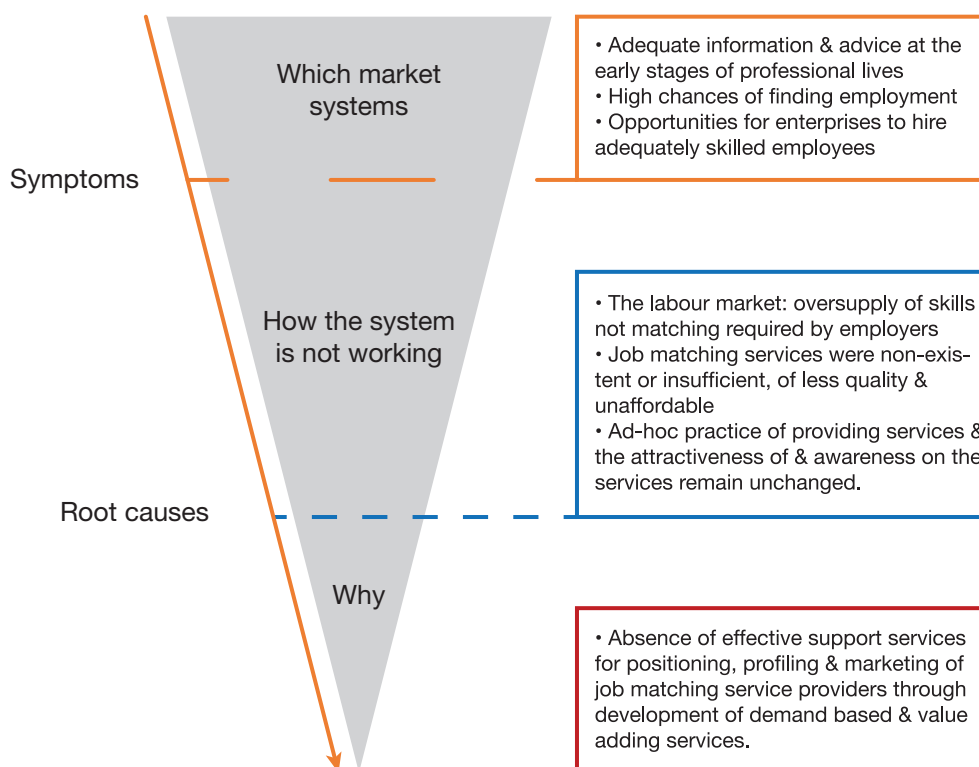


Figure 1: Symptoms and root causes

3.3. PRIORITISING OPPORTUNITIES IN THE JMS MARKET SYSTEM

The analysis enabled the design team to understand the priorities and opportunities and the key driver for change in the JMS market system. Table 1 below summarises these.

Market Partners	Driver	Restrains	Intervention	Harmonisation
Private Job Matching Firms operate on a commercially sustainable basis	Increased profits strong momentum for web based providers	Job matching market is still too small for companies to be profitable	Develop the market through marketing and new value-added services	No other projects

Table 1: The opportunity and the key driver(s) for change

The project team determined that the priority opportunity would be to partner with nascent private JMS providers. This prioritisation was assessed as being both relevant and feasible. The JMS intervention would target commercially sustainable operations within the few nascent private job matching firms. The incentive was increased and sustained profits. There was a risk that the market was too small for crowding-in large numbers of JMS providers and the project team determined that any crowding in would relate to young job seekers.

The facilitative intervention was to be aimed at JMS providers through effective positioning, profiling and marketing and through the development of demand based and value adding services. These intervention areas would, respectively, increase awareness of the benefits of job matching services, to young job seekers and to private employers, and would help ensure the relevance and sustainability of services to address the needs of young job seekers and private employers.

SUMMARY ON UNDERSTANDING THE JMS MARKET SYSTEM

- Prior to EYE's intervention, job matching services were non-existing or insufficient, of low quality and unaffordable. The lack of efficient private and public job matching services meant very few employers were using matching services. Most employers were using print media to advertise vacancies.
 - Employers also preferred to reach out to family and personal networks to find new employees. The analysis of the EYE project showed that the underlying cause for the underperformance of the system was lack of support services to job matching providers for positioning, profiling and marketing through the development of demand based and value adding services.
 - Services were constrained by a lack of quality providers, including market awareness, sustainable business models and marketing strategies. Improvement in these areas would increase awareness of the benefits of job matching services to young job seekers (their needs and behaviour) and to private employers (meeting skills and types of work).
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4. STRATEGY

This section highlights the logic that was adopted to address the JMS market system constraints. It describes the business model that was proposed and identifies the strategic framework linking youth employability with a focus on sustainable systemic change.

The planning process resulted in a strategic framework for the EYE JMS intervention. The strategy targeted young women and men, ranging in age from 15-30, who have completed their education in Kosovo and are actively pursuing post education work. The four basic aims of the strategy were to:

- Define the objective insofar as it relates to young job seekers;
- Identify the opportunities to benefit young job seekers;
- Assess the feasibility of inducing system level change – that is, improved support services to job matching providers; and
- Establish the main parameters of the JMS intervention to guide the design process.

In order to establish what the JMS market system would look like at the end of the project, the team also looked at a vision for the intervention. To develop the vision, they: aimed to better understand the existing picture and, in particular who is doing what and who is paying for it; developed a realistic picture of how the JMS market system would be functioning in December 2016; decided on the main focus of the JMS intervention which will be needed to bring about the vision: and elaborated a more detailed strategic framework. The strategic framework helped to ensure that the JMS intervention would always be conducted on an informed basis. Research and analysis would take on a central role - throughout the intervention period - in informing (and evolving) the JMS strategy and monitoring its effectiveness. This helped to ensure that the JMS intervention would continue to target the root causes of underperformance rather than only the symptoms.

The strategic vision, for December 2016, (as at late 2012) was that there would be a decreased level of support to job matching services and that private providers will have enhanced innovative and demand driven services which will ensure their sustainability. Assuming sustained economic growth, together with increased ownership and improved practice by actors in the market, the project team foresaw strong private sector matching service providers that are active in the job matching market and that provide demand driven and innovative services for job seekers.

4.1. A FACILITATIVE MARKET SYSTEMS DEVELOPMENT APPROACH

The adoption of the market systems development approach has provided the overall strategic framework for the EYE project, defining its objective and shaping the intervention strategies, their implementation, and the role of the project with regard to other players in the JMS market system. This approach emphasises the importance of large-scale and durable changes. It provides principles and frameworks that guide development initiatives towards playing a more facilitative role, rather than providing solutions directly to the target group – young women and men.

This results in a concentration on achieving large-scale and durable changes as the objective of the JMS intervention and is embedded into the logic of the JMS intervention design from the outset. Accordingly, the JMS intervention does not

The focus on reduction of youth unemployment, and working towards a more effective youth labour market system, presented an opportunity for the private sector to focus on the development of innovative matching and recruitment services. The EYE approach for JMS is not sectoral. At the design stage, based on the analysis of the market system, it was considered that such a focus was not appropriate given the nature of the market and market players, who did not operate on a sectoral basis.

provide services itself to young job seekers, but rather, stimulates existing players in the market system to do so.

4.2. A DEFINITION OF SYSTEMIC CHANGE

The market systems development approach specifically focuses on facilitating systemic market changes defined as large-scale and durable changes. Systemic change is a term which has been more frequently used in recent years. A consensus on the definition has yet to be reached. A system is generally regarded to be a series of interconnected supply-demand transactions which are supported by functions and governed by formal and informal rules. These supporting functions and rules (including through their absence) dictate the terms of the transaction. In order to change the way the system works, there is a need to change how these supporting functions and rules work. Systemic change aims for depth, breadth, and length of impact. Broadly, there are four key principles of what a systemic change should be. These are as follows:

1. An innovation in the way a system works, determined by a shift in the operation of supporting functions or rules to the benefit of a well-defined target group.
2. Uptake, ownership and investment in that innovation by relevant players within the system, in the absence of external involvement.
3. Spread of the impact of that innovation so that it becomes normal within the system of how those supporting function or rules operate.
4. Changes in other supporting functions and rules to stabilise or augment the impact of the initial innovation.

4.3. THE STRATEGIC FRAMEWORK FOR THE JMS INTERVENTION

The strategy helps to ensure that the JMS intervention is focused on systemic change, which will directly address the needs of the young job seekers. The strategy comprises four broad “thrusts”. These enabled the JMS intervention to ensure that it adopted a catalytic approach to the market system.

A clear aim of the EYE JMS intervention is to stimulate (crowd-in) players, and not crowd-out. It is designed to support market players to play more valid roles in the youth employment market system, thus creating ownership and drive from the outset. In doing so, the intervention has taken on the role of a catalyst, stimulating innovation in the labour market for young people in collaboration with selected local market partners.

Key focus	What the focus means in practice
A definition of the objective(s) for the JMS intervention	<ul style="list-style-type: none"> • Includes the potential to reach large numbers of young job seekers in Kosovo. The objective was (and is) “greater employment opportunities for young women and men in Kosovo”. • The project team determined that the status of young job seekers included a lack of accessibility to opportunities and a lack of understanding of what the opportunities were: type of work, skills and knowledge required, application process. • The project team also determined that the greater access to employment opportunity (employability) would be through the provision of demand based matching services provided by private actors and that the JMS intervention would target the development of these private actors.
An identification of the opportunities which will benefit young job seekers	<ul style="list-style-type: none"> • The project team determined that the opportunities were directly related to an increased employment level and that the greatest potential for this is through accessible, web based portals, and associated services, which aimed to match job seekers with job opportunities.

An assessment of the feasibility of stimulating JMS system level change	<ul style="list-style-type: none"> For change to be sustainable, it must be led by market players and the project team assessed which market players had both the incentives (will) and the capacity (skill) to support change. The team also assessed the changes taking place in the market system. Momentum included the shift from newsprint to web based information, with the associated lower transaction costs, increasing demands from private employers for employees with relevant skills, a recognition of the youth employment problem by government and associated policy.
A detailed project design process	<ul style="list-style-type: none"> The project team established a strategic framework for the JMS intervention area and set indicators and targets for improved access to employment for job seekers and increasing opportunities for youth employability / employment.

Figure 2 summarises the process which was undertaken by the project team during the development of the strategic framework. It helped to ensure real potential for young job seeker benefits. In relation to the strategy for improving youth employability, the criteria included:

- the relevance to young job seekers
- the opportunity to achieve the objectives
- the feasibility to stimulate change

Kosovo EYE JMS - Relevance, Opportunity and Feasibility

<ul style="list-style-type: none"> National level impact and beyond Significant numbers of target group Long lasting impact on employment opportunities for youth in Kosovo Sustainable Scalable 	Relevance? Yes Competitiveness? Yes
<ul style="list-style-type: none"> Become competitive Maintain competitiveness Innovation on JMSPs Scalability 	Opportunity to achieve objectives? Yes
<ul style="list-style-type: none"> Limited government or stakeholders incentives Sufficient scale of current or future operations to enable effective sector functions and rules to be provided An established private sector base, where partnerships are feasible Clear opportunity for Kosovo EYE to influence sector stakeholders, including a receptive government Scope for testing innovative approaches and their potential for broader application 	Feasibility to stimulate transformation? Yes




Figure 2: A summary of assessment of relevance, opportunity and feasibility of the JMS market

4.4. A HIERARCHY OF OBJECTIVES FOR SYSTEMIC CHANGE

The strategic framework is in the form of a hierarchy of objectives, or theory of change model, as summarised in Figure 3. This illustrates how the overall goal of youth employability / employment is fully aligned with large-scale and durable changes. This would be achieved through a greater number of job seekers using, more relevant and accessible, job matching services. For the sustainable delivery of these services, more private employers would have to be willing to pay for services to attract “right skilled” job seekers.



Figure 3: Impact logic of the job matching services

Achieving this overall objective requires growth in the JMS market via improved access to services. This would be delivered through improved competitiveness and innovation, among the JMS providers, and a greater access, for young job seekers and private employers, to differentiated services which would meet the market demands. Sector growth and improved access required a change in the JMS market system. This would require a shift from basic and non-responsive job portals to a market populated by demand led, innovative and evolving JMS businesses. This strategic hierarchy illustrates that any JMS market intervention would have to stimulate lasting change through the facilitation of market players.

SUMMARY ON STRATEGY

- The strategy comprised four broad ‘thrusts’: a) defining the objective(s) for the job matching service intervention; b) identifying opportunities benefitting young job seekers; c) assessing feasibility for stimulating job matching service system change; and d) detailing out project design process.
- The objective of the new business model was to develop the job matching service through marketing and new value-added services. The project targeted commercially sustainable operations within the few promising private job matching firms.
- The JMS strategic framework was tested through a “piloting” process where a limited number of market players would be identified, selected and supported, through the provision of seed / proof of concept capital and intensive facilitation.
- The aim was to stimulate the market to become more responsive, innovative and accessible. Through this process, it was foreseen that the market would grow, crowding-in more market players, offering differentiated services and creating an accessible and relevant set of services for young women and men job seekers.
- The strategy for the JMS intervention responds to the findings and recommendations generated by the initial analysis of private JMS providers in Kosovo. In this context, it is both valid and delivery plans are realistic. Thus, it is appropriate that JMS providers should remain the focus of the EYE intervention until the intervention is phased out.

5. ACTIONS TAKEN

This section identifies and examines what the EYE project JMS intervention has done and how it has done it to achieve its objectives.

There were two main sets of actions undertaken. The first of these was the conducting and reviewing of pilot interventions and this was followed by a second, the conducting of supplementary interventions that stimulated “crowding-in” of young women and men job seekers.

5.1. IDENTIFICATION OF INITIAL MARKET PLAYERS

There were two key market partners for the pilot job matching service intervention: KosovaJob and PortalPune. They were existing, single and basic service, job portals, based in Pristina (Kosovo). They were selected through a process that involved an analysis of all existing market players, a concept note and a formal application with a business plan. The evaluation of the businesses and their plans was facilitated by engaging a co-facilitator, KOLEKTIV in Sarajevo (Bosnia & Herzegovina). KOLEKTIV is a regional specialist in the provision of job matching services and a part of a seventeen country network. Detailed evaluation matrices, with reports and scores, were developed. Eleven evaluation criteria were used.

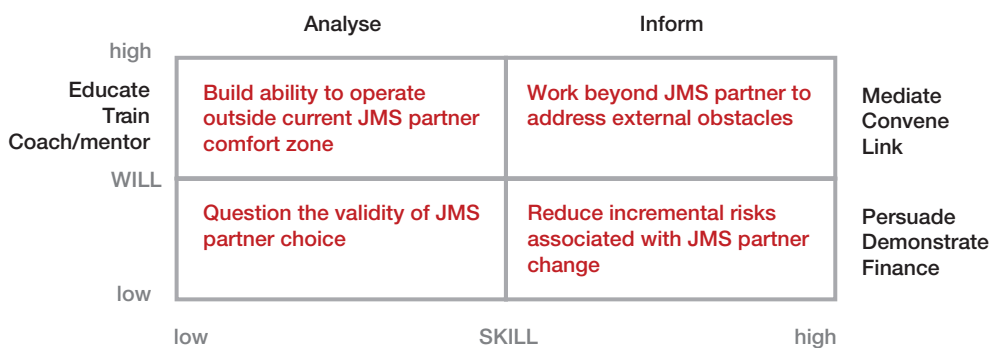


Figure 4: the “will” and “skill” matrix to help assess market partners

The partner selection took into consideration the incentives (“will”) and the capacities (“skill”) of potential market partners during selection and determined the likely post-selection facilitation, co-facilitation and other intervention areas based on these documented assessments. Figure 4 illustrates the will and skill relationship and this aided the selection team to map the position of evaluated and selected market players and, subsequently, to design relevant support interventions for them. At this point, the project team relooked at the history and momentum of the JMS market. Innovation from elsewhere was identified through productive engagement with the JMS co-facilitator (KOLEKTIV in Sarajevo). The EYE team considered the ambition, realism, validity and positivity of the potential JMS providers during the evaluation and selection process. A cohesive strategy was established to guide project actions: for example, analysis has enabled a determination of who will implement each action and who will pay. This helps ensure long term sustainability and has been captured in short concept notes and in the, regularly updated, JMS intervention guide. Future job matching businesses would have to be market responsive and profitable provide a wide range of services such as recruitment, temporary recruitment, HR consultancy, job fairs and career guidance.

5.2. STIMULATING MARKET PLAYERS TO IMPROVE THEIR PERFORMANCE

Post selection, the two pilot JMS providers were supported to develop their business plans. The plans assessed market demands, and the services required to meet those demands, and provided a comprehensive financial plan for any seed / proof of concept funding required. The plan also assessed the focus and level of effort required in the form of facilitation and co-facilitation from the market experts in Bosnia-Herzegovina. This was done to create the necessary conditions for the pilot phase.

The objective of the new business model was to develop the job matching service through marketing and new value-added services. The project targeted commercially sustainable operations within the few promising private job matching firms. The incentive was increased and sustained profits. This would increase awareness of the benefits of job matching services to young job seekers and to private employers, and would help ensure the relevance and sustainability of services to address the needs of young job seekers and private employers.

To support the development of a new business model, the project assisted the selected online portals through a co-financing grant. The grant was used to mitigate some of the risks associated with the introduction of new services and to support the implementation of approved business plans.

BOX 1: ACTION – MAIN HIGHLIGHTS

Where the project intervened

- Support market system to stimulate changes in capacity & behaviour of job matching providers & users

Who the project engaged

- Two job portals KosovaJob and PortalPune.; one regional service provider, KOLEKTIV
- Considered the ambition, realism, validity and positivity of the potential job matching service providers

What “right-sized” support given

- Development of business plans
- Co-financing to mitigate risks in introduction of new services
- Monitoring & knowledge management system
- Overall consistency of action with strategy

The project and the two selected online portal providers collaborated to ensure job matching services become a potential for growth and the main channels, through which, young women and men would be able to access information about job vacancies. The project supported the providers through increasing awareness among private sector employers on the value of these job matching services. The key to the success of the new business model was to ensure the willingness of private sector employers to pay for such services.

The project then started sharing the experiences/evidence with other potential providers to stimulate expansion of the market, which had limited scale through more service providers. Although the market was “thin” the analysis and design by the project indicated that it was large enough to sustain a few players in a competitive environment in terms of number of users (job seekers and employers). The project monitored additional opportunities and stimulated further actions; it also monitored and documented any independent initiatives by other providers without its support.

SUMMARY ON IMPLEMENTATION

- There were two main sets of actions undertaken: a) conducting and reviewing of pilot interventions, and b) conducting of supplementary interventions that stimulated ‘crowding-in’ of service providers, employers and job seekers.
 - Two key market partners for the pilot job matching service intervention were KosovaJob and PortalPune. They were existing, single and basic service, job portals, based in Pristina (Kosovo). They were selected through a process that involved an analysis of all existing market players, a concept note and a formal application with a business plan. The evaluation of the businesses and their plans was facilitated by engaging a co-facilitator, KOLEKTIV in Sarajevo.
 - The support provided was appropriate and appreciated. The level (intensity) of the support provided has been well judged and this is largely due to the experience and existing networks of the facilitator(s) and managers.
 - However, there has been a tendency to shift from facilitation to direct advice. This has, at times, led to role confusion and a lack of clarity, in market partner businesses, around the nature of facilitation.
 - Overall, the interaction has been managed well and feedback, elicited during the study, suggests that the facilitator and partner relationship has contributed significantly to the results of the EYE JMS intervention.
 - The project monitored additional opportunities and stimulated further actions; it also monitored and documented any independent initiatives by other providers without its support.
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6. RESULTS ACHIEVED

This section describes the changes resulting from the initial analysis, strategy, designed interventions and planned actions. The section is structured to highlight: whether the underlying constraints (identified through analysis) have been addressed; the observed core market changes in the JMS system; current performance and positive achievements of the EYE JMS intervention; behavioural changes in the JMS market system; and quantitative results, compared to baselines, indicators and targets.

The job matching services intervention has addressed underlying constraints, including the inefficient and ineffective linkages between the demand for skills and the supply of skills. Evidence, generated through the monitoring and evaluation (M&E) system, highlights that more and better job matching services are aligned to increased awareness and readiness of both employers and job seekers to use these services. This is illustrated by the comparatively large number of enterprises that have paid to publish job advertisements (see tables below). The effective market delivery of these various innovations and initiatives has resulted in increased business revenues and trading surpluses.

The implementation model is creating ownership and a strong external market dynamic. The JMS intervention has stimulated innovation in the labour market for young people in collaboration with various local partners. There is also verifiable evidence, based on results so far, that change has been enabled. This change has transitioned the way in which the JMS market system operates.

The JMS intervention has stimulated market players to perform market functions that they were not performing or performing inappropriately. These include the utilisation of appropriate technologies for job matching platforms, effective marketing and innovative service development based on an increasing understanding of demands in the JMS market system.

6.1. PARTNERS ADOPTING AND EXPERIMENTING WITH THE BUSINESS MODEL

The pilot phase included a first element, where selected market partners uptake and experiment as well as demonstrate ownership of the business model. Two out of three leading JMS providers (the two selected market players) have adopted, and are developing, new business models with a clear vision for their long-term growth and sustainability. To support the adoption and development of new business models, the EYE project has assisted both selected market players through a co-financing grant via the EYE Opportunity Fund (OF). The OF grant has been used to mitigate some of the risks associated with the introduction of new services and to support the implementation of approved business plans.

Currently both businesses offer eight service “lines” compared to the single service offer prior to the revision and restructuring of their business models. Both now charge for their services. These services include: job advertising; recruitment; the provision of differentiated on-line and real time training services; automated CV databases; pre-selection services for employers; banner advertisements; internship matching and marketing and awareness raising events.

The two selected market players are the market leaders, sharing nearly 65% of the job advertising and job vacancy market. These market leaders are diversifying into more sophisticated recruitment and other human resources development (HRD) services, including screening, initial interviews, national and international search,

The job matching service market is growing and diversifying and market leaders are emerging. Licencing and regulations were introduced by the Ministry of Labour and Social Welfare. This happened without the project’s contribution. If properly enforced by the government, this will neutralise the more disruptive elements in the market, indeed, together with more sophisticated demands from employers (better digital matching services, job advertisements, job seeker training services, recruitment services, human resources development services and head hunting services).

the development of job descriptions and candidate specifications and candidate preparation. They are also collaborating, rather than competing, in key service areas where there is mutual benefit (to address rapid market growth for differentiated and innovative services), and this represents a significant behavioural change in the core market. One of the market leaders is now contracted to work with the largest regional employment services provider as their network representative for Kosovo and Albania. This business is already contracted to find staff for major European employers, including 100 staff for a major European airline and it now have access to 17 national recruitment and job matching markets.

6.2. PARTNERS INVESTING AND ENHANCING THE BUSINESS MODEL

The second element of the pilot phase, aims for investment and further improvement of the business models by the partners. Each of the two selected market players has invested more than EUR 60,000, from their own sources, in their businesses. The combination of EYE Opportunity Fund co-financing (Euro 25,000 and Euro 20,000) and the JMS intervention facilitation support transferred confidence to the two businesses, in particular their owners, and leveraged these substantial investments. Sophisticated web based job search engines were developed to offer an additional range of job matching services.

To help expand their business model, companies were linked to similar job portals in the Balkans region. Through exposure to better functioning business, technology and innovation models, market partners have been able to generate additional income streams, allowing them to operate as commercially sustainable businesses, and use advertising services to market their products to private employers and individual young women and men job seekers. The selected market partners were developing new business networks, developing products and services for new and international (Germany, Albania and Middle East) markets. They were developing relationships with career guidance centres and training service providers, as well as with NGOs providing support to women job seekers. They have been developing virtual platforms and applications for education and training as well as self-assessment tools.

6.3. BUSINESS MODEL MAINSTREAMED IN THE MARKET SYSTEM

Similar or competing JMS providers have copied partner behaviours or have added market diversity. These are the job seekers and the employers. Seven new market entrants started providing job matching services and copying the market leaders' basic services. In addition, substantial numbers of new job seekers started using the services of market partners and many private employers starting paying for some services. To stimulate enhanced performance of market functions, the EYE project team engaged with the wider group of JMS market players, career guidance counsellors at universities, Vocational Education and Training (VET) school curricula developers and representatives of private employers.

The market is growing and, consequently, the number of market users (job seekers and employers) are growing. Many of these market players offer basic job matching, through a digital platform. For some, job matching is secondary to news services and, for others, the activities are limited to disruptive (and unethical) copying and pasting from other sites. Others are differentiating their services and are starting to grow the number of paying clients, the number of job seekers and their own revenues. The selected market partners are significantly growing their revenues. The JMS intervention team undertook in September 2015 an internal

Private JMS providers are continuing to expand their services for their clients. These range from recruiting to providing specific training for private employers. JMS providers have matched over 100 internships for unemployed young people in the last two quarters. The JMS providers projected revenues for 2015 have increased threefold compared to 2014. This evidence illustrates and supports the increased interest of the young unemployed women and men, as well as private employers, to actively use the professional services of JMS providers.

market assessment. This research has involved regular observation and analysis of the nine portals.

There is significant anecdotal evidence that the market entry of unethical players, copying and pasting job advertisements, has created some market perceptions leading to low trust and credibility amongst private employers. Disruptive players in the JMS provider market are copying adverts from original portal sources. Subsequently, it is not easy to trace the original source and allocate adverts appropriately. In addition, copied advertisements are being treated as new advertisements. Accordingly, there is potential for data distortion (and over-reporting the figures) here. This should also be addressed by the project.

BOX 2: BEHAVIOURAL CHANGES – SOME EXAMPLES

- **Job matching service providers:** transition towards recruitment and other value adding human resource development services;
 - **Employers:** willingness to pay for services and changes in hiring behaviour linked to greater awareness and requests for more sophisticated recruitment services;
 - **Job seekers:** willingness to pay for services; transferring soft skills to other job seekers; using smart mobile applications to access job markets;
 - **The public sector:** formal recognition of the role of the private sector in the provision of job matching and other employment services; willingness to collaborate; policy changes around partnerships with the private sector and licensing and regulation of private providers.
-

Market players are now training job seekers on, paid for, courses in soft skills related to the job application and interview process, and some are also responding to a significant need for training on workplace orientation and behaviour. They are also innovating channels for delivering services, including the use of smart phone application platforms for job seekers and on-line interactive skills development programs which are designed to be sector specific.

6.4. WIDER RESPONSE TO THE BUSINESS MODEL

The project engaged with government to enable the transition of some publicly provided matching services, to the private sector and to advocate for a licensing regime for private JMS providers. Study feedback indicates that the project managed these relationships well and subsequent changes were brought about due to:

- The willingness of EYE managers and facilitators to understand the timeframes for change, to the sensitivity, of EYE staff, to the political economy in which they were engaged; and
- The willingness of EYE staff to respond to the needs of those with whom they were engaging.

The Ministry of Labour and Social Welfare has changed its behaviours from initial rivalry to collaboration with the private sector on several employment service areas and they have started a licencing and regulating process for private JMS providers. The Ministry of Education, Science and Technology have entered into a dialogue of collaboration on the development and provision of private virtual training and guidance platforms.

Licensing and regulating of the market is planned by the public sector and there have been market responses from VET schools and University Career Guidance Centres. There is an on-going diversification into municipalities to understand better, and respond to, the non-Pristina market in Kosovo. Female skills development, through Non-Governmental Organisations, has taken place. There has been significant, and

continuing, crowding-in of job seekers as well as paying private sector employers.

A large international Human Resources Development services provider has contracted a selected market partner to provide networked products and services in Kosovo and in Albania. The JMS market, in Kosovo, although thin, has experienced a significant market system response, from non-competing players.

<p>ADAPT</p> <p>Partners invest & undertake improvements in changes adopted</p> <p>Market players are now training job seekers on, paid for, courses in soft skills related to the job application and interview process, and some are also responding to a significant need for training on workplace orientation and behaviour. They are also innovating channels for delivering services, including the use of smart phone application platforms for job seekers and on-line interactive skills development programs which are designed to be sector specific.</p>	<p>RESPOND</p> <p>Non-competing market players adjust their own practices in response to changes</p> <ul style="list-style-type: none"> • The Ministry of Labour and Social Welfare: shift from initial rivalry to collaboration with the private sector on several employment service areas; • The Ministry: licencing and regulating process for private job matching service providers; • A large international Human Resources Development services provider has contracted a selected market partner to provide networked products and services in Kosovo and in Albania.
<p>ADOPT</p> <p>Partners uptake & experiment; they demonstrate ownership</p> <p>KosovaJob & PortalPune</p> <ul style="list-style-type: none"> • Developed new business models; • Offer eight service “lines” compared to single service; • Charge for their services (e.g. job advertising; recruitment, training etc.) 	<p>EXPAND</p> <p>Mainstreaming --similar or competing players copy ‘early adopters’ & add diversity</p> <ul style="list-style-type: none"> • Seven new market entrants started providing job matching services & copying the market leaders’ basic services; • In addition, about 190,000 new job seekers started using the services of market partners; • About 4,430 new private employers starting paying for some services.
<p>Pilot phase</p>	<p>Crowding-in phase</p>

Figure 5: examples of sustainability and scale

Tables 2, 3, 4, 5 and 6 below, support the above commentary and illustrate well impact performance and results against indicators, which are set out in the EYE JMS intervention guide.

Indicator	Baseline in 2012	2013-2015 (3 years avg.)
No of Vacancies advertised through private service providers per annum	1,000	20,567
No of job seekers using job matching services	8,041	65,347
Total gross income earned by supported service providers	EUR 5,000	EUR 58,729
No of enterprises using service providers	620	1,684
No of paid for advertisements per annum	0	1,128
No of unique visitor “clicks” to service providers sites per annum	490,718	1,102,384

Table 2: Summary of key figures showing achievements between 2012 and 2015

	2012 Baseline	2013	2014	2015 Projected	Target Log Frame
Job seekers using JM services	8,014	11,592	68,661	89,500	-
Job vacancies advertised (private and public)	10,434	28,502	28,213	31,034	20,000
Gross income per supported JMSP	EUR 5,000	EUR 17,500	EUR 59,342	EUR 71,210	EUR 20,000
Enterprises using JMSP services	620	1,205	1,124	1,574	-
Number of, paid for, job advertisement Per Quarter	0	250	1,124	1,574	-
Number of unique visitor "clicks" Per Quarter	490,718	1,029,001	1,108,028	1,440,500	-
Job vacancies advertised (private only)	1,000	21,522	21,647	21,694	-
Number of JMSPs providing matching services	2	4	7	9	-
No of companies using recruitment services of JMSPs	0	0	9	36	-
New partnerships between JMSPs and Trainers	0	0	2	4	-
No of NGOs, targeting socially excluded, working with JMSPs	0	0	1	2	-
No of players who now receive reports on the assessment of the job matching market from the EYE project	0	0	15	18	-
<i>Table 3: JMS intervention results so far</i>					

	MALE	FEMALE	TOTALS
2013	0	0	0
2014	7,681	4,237	11,918
2015 (projection)	9,217	5,084	14,301
TOTALS	16,898	9,321	26,219

Table 3: The number of young women and men who have found a job through vacancies supported by job portals, indicating an increase in better matched job opportunities.

	MALE	FEMALE	TOTALS
2013	0	0	0
2014	34	23	57
2015	37	19	56
TOTALS	71	42	113

Table 4: The number of young people who have found a job through recruitment services of supported job portals.

	MALE	FEMALE	TOTALS
2013	0	0	0
2014	15	9	24
2015	120	72	192
TOTALS	165	81	246

Table 5: The number of young women and men who have been matched in internship positions.

	MALE	FEMALE	TOTALS
2013	0	0	0
2014	172	92	265
2015	516	279	795
TOTALS	688	372	1,060

Table 6: The number of women and men who have been trained by JMSPs on soft skills.

Qualitative feedback, received during study fieldwork, from partners and other stakeholders, overwhelmingly suggests that the JMS intervention is seen to add value, has credibility and is viewed as a source of guidance and support. When asked to describe the benefits derived from the JMS intervention, the most frequent responses were "Catalytic", "Accelerator", "Quality Advice", "Dynamic", "Responsive", "Relevant", "Awareness Raising", "Value Adding" and "Mentor". These are all elements of facilitation and, accordingly, they point towards the conclusion that the intervention has adopted a facilitative approach which is perceived as successful. The study has developed two short narratives, drawn

from interviews with jobseekers and private employers. These are at Annex Two and serve to indicate market demands and behaviours, in the context of the EYE JMS intervention.

As indicated above, one market player has contracted to become the network partner of the regional market leader in employment services. This exposure to new markets and new demands will fundamentally change the JMS market in Kosovo. It will reach scale in less time.

SUMMARY ON RESULTS ACHIEVED

- One conclusion of this study is that the JMS intervention has addressed underlying constraints, including the inefficient and ineffective linkages between the demand for skills and the supply of skills. Evidence, generated through the M&E system, highlights that more and better job matching services are aligned to increased awareness and readiness of both employers and job seekers to use these services.
 - Initial analysis suggested that there was a weak and inefficient supply of service providers connecting supply and demand. This was identified as the root cause (underlying constraint) of the problem and it was foreseen that the sustainable and scalable development of the existing weak market for private JMS providers was the solution to these underlying constraints.
 - There are now nine job matching service providers. The 2012 baseline indicates that there were then three, including the two selected market partners. The JMS market is growing and diversifying and market leaders are emerging. As indicated above, there are fundamental behavioural changes of the different stakeholders.
 - The introduction of licencing and regulations, if properly enforced by the government, together with more sophisticated demands from employers - better digital matching services, job advertisements, job seeker training services, recruitment services, human resources development services and head hunting services - will neutralise the more disruptive elements in the market.
-

Evidence, generated through the intervention M&E system, highlights that more and better job matching services are aligned to increased awareness and readiness of both employers and job seekers to use these services. This is illustrated by the comparatively large number of enterprises that have paid to publish job advertisements. The effective market delivery of these various innovations and initiatives has resulted in increased business revenues and trading surpluses.

7. LESSONS IDENTIFIED FOR WIDER CONSIDERATION

This section identifies the lessons learned through conclusions reached which are of wider relevance to the development community. It also indicates what they signify. To enable ease of cross referencing these to the conclusions of the study, a comprehensive set of study conclusions are in Annex 3.

7.1. UNDERSTANDING A RAPIDLY CHANGING MARKET SYSTEM

In rapidly changing market systems, such as job matching services in Kosovo, market diagnosis should be iterative and adaptive and, ideally, be undertaken more frequently. New information should be reflected in the project (intervention) M&E indicators. This would help ensure that the intervention plans and activities reflect changes that were taking place in the ever-evolving external market system.

Once the market system is identified, overall success is linked to: a thorough examination of the relevance of that market to young job seekers; the opportunity to increase their access to employment opportunity; and feasibility of successfully stimulating change in the JMS market system. A thorough mapping of the chosen market system will identify the likely barriers and constraints to successfully delivering the project objective and support the development of a plan, from the outset, to overcome the constraints. The type of information required here is: the role of job seekers in the current job matching system; the nature of the disadvantage that they face; the relationships that exist between the key players in the job matching system; why the job matching system is underperforming; and what opportunities exist for long term systemic change.

In the early phase of intervention, there was an apparent lack of clarity and understanding around the requirements for implementing a systemic or Market Systems Development (MSD) approach, including monitoring requirements and, as a result, some of the requisite monitoring took place retroactively. Analyses and diagnostics should not be a “one-off” event and should be undertaken during project implementation to establish: what changes have occurred; how the intervention managers should respond and how the changes identified will influence intervention indicators and targets. There is evidence that the MSD approach requires extra, front loaded, investment in knowledge transfer and understanding by the Intervention staff to help ensure appropriate planned outputs and outcomes. Core competencies required (most often) in a market system(s) development intervention include: management and organisation skills (motivation, direction, planning and reporting); analysis and diagnostic skills; facilitation skills (in abundance); and monitoring and measuring skills and expertise.

7.2. INTEGRATING M&E SYSTEM IN THE PROJECT DESIGN AND IMPLEMENTATION

Consideration and information, on how to monitor market systems should be embedded from the project outset. Some confusion existed in the early stages of the project and this has resulting in monitoring gaps leading to a lack of clarity around early progress and performance. This suggests that projects will benefit from an initial team training and coaching event which emphasises the importance of monitoring and sets out (through guidelines) the approach to monitoring and the way that monitoring information should be reported and utilised.

The EYE project would benefit if all individual intervention monitoring and reporting systems were standardised and embedded in the M&E system for consolidated management and stakeholder reporting. This means that management decisions and reports would reflect the whole project and, accordingly, enable full benefits to be accrued from the inherent synergies in the project design. The M&E system has not yet been fully integrated into project management systems. Further integration will enhance internal learning, particularly related to the causal links between actions taken and results achieved.

The JMS intervention is currently assessing whether it is affecting the JMS system positively as a basis for the assessment of wider impact. However, the M&E system is not assessing indirect impacts. This is limiting opportunities for optimal aggregation and plausible attribution. In-house monitoring should target partners but should equally target wider market changes. The JMS intervention substantially focused on the monitoring of market partners at the expense of the wider market, resulting in a sub-optimal understanding of the market system dynamics in the early stages of the project. As above, this wider monitoring should be embedded in the intervention monitoring system and communicated to project staff at the outset.

7.3. THE ROLE OF COMMUNICATION AND KNOWLEDGE SHARING

Intervening in interconnecting / intersecting markets brought synergy (contribution and aggregation). However, optimising project outcomes required very effective internal communications, including regular knowledge sharing events between those who were responsible for the various project interventions. This process should be embedded in the project management (including guidelines) and should be enforced and facilitated by project managers. A determination of information, and the level of detail, to inform the strategic framework should be defined from the outset.

The JMS providers, through learning as the market has developed, have been the repositories of a significant amount of market information relating to demand and supply. Accordingly, they have played a major role in information development and dissemination which has informed the direction of the JMS intervention. This indicates that an alignment between partner information and project information is vital to the ability of the project to adapt in a timely way to market changes. Furthermore, there is value in exposing selected market players to other players, from outside the market system. These external players are able to add immediate value and can help with the avoidance of early mistakes through lack of knowledge within chosen partners.

7.4. CLARITY OF ROLES AMONG PROJECT STAFF, CO-FACILITATORS AND MARKET ACTORS

Thin markets like the JMS providers in Kosovo, which are relatively uncompetitive and private sector activities are only gradually picking up, are much less likely to be distorted by continuing to deliver market support through (not to) those players (JMS providers). This indicates that partners could (should) be used to support changes in interconnected markets (for example, curricula development in VET schools) without any deleterious impact on the core market. To avoid unnecessary barriers to progress, co-facilitators should be embedded into the project at the

outset. This would help to ensure that innovations, skill and knowledge transfers and business models are relevant and well supported and it would help ensure the avoidance of early mistakes relating to market research, business modelling and services development.


The key critical success factors on implementation have been facilitation, relationship management, knowledge transfer and the development (and “signposting”) of networks. These are highly labour intensive activities, but have low capital intensity. This is characteristic of a market systems development approach where intervention and facilitation skills are prioritised and where large funds and capital budgets are less relevant. This differentiation should be reflected in the experience of project managers and staff and should be a criteria for intervention manager posts. Some of the early problems experienced, by the two pilot market partners, on operating and business models would have been partially avoided by an early engagement with the JMS co-facilitators, particularly on sustainability, platform technology, service development and awareness of demand.

7.5. WHEN TO PHASE OUT

A successful vision establishes, from the outset, what should be in place for the project to exit. A successful vision will often have assessed the current and future picture by looking at the core (supply and demand) function, the supporting functions and the rule setting functions in the context of who is undertaking (and who will undertake) the function and who is paying (and who will pay) for the function to be undertaken. Continuation of intervention beyond addressing the main constraints has the risk of displacing or distorting other incentives or investments; and perhaps the presence of the project has become a “blocker of change” or has the potential to create “perverse incentives” for more changes.

When reflecting on the effectiveness of an intervention, the team should consider whether: enough has been done to ensure confidence that the system is sufficiently robust to cope with external threats; the supporting systems are now able to find solutions, from within, to the underperformance of market players; further intervention would risk displacing or distorting other incentives or investments; and whether the presence of the project has become a blocker of change or has the potential to create perverse incentives for autonomous change.




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