



National study on the economic impact of copyright-based industries in Albania

**A National Study applying the WIPO Methodology
July 2026**

Imprint

As a federally owned enterprise, GIZ supports the German Government in achieving its objectives in the field of international cooperation for sustainable development.

Published by:

Deutsche Gesellschaft für
Internationale Zusammenarbeit (GIZ) GmbH

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Produced by:

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Design/layout:

IDRA Research and Consulting

Photo credits/sources:

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On behalf of:

German Federal Ministry for Economic Cooperation and Development GIZ is responsible for the content of this publication.
Tirana, July 2026

Foreword

Copyright-based industries represent an increasingly important component of the modern economy, fostering creativity, innovation, and sustainable development. In this context, the National Study on the Economic Contribution of Copyright-Based Industries in Albania, the first of its kind in the country, marks an important milestone in assessing the economic contribution of these industries.

Prepared with the support of GIZ, this study provides, for the first time, a robust statistical and analytical foundation for measuring the economic significance of copyright-based industries in Albania. Its findings will serve to inform evidence-based public policymaking, strengthen the creative sector, and further enhance the effectiveness of the copyright system in addressing the emerging challenges posed by global digitalisation.

The importance of this study is particularly significant in the context of Albania's European integration process.

I am confident that this study will serve as a valuable reference for public institutions, the private sector, the creative community, and international partners, contributing to the development of Albania's creative economy and to the achievement of the country's objectives on its path towards membership in the European Union.

Mr. Blendi Gonxhja

Minister of Tourism, Culture and Sport

Creativity is far more than a pillar of cultural expression and identity; it is a vital driver of innovation. Understanding its contribution to Albania's economy is therefore an important step towards recognising the full potential of the country's creative community and strengthening its contribution to sustainable development.

As Albania moves forward on its journey towards European Union membership, Chapter 7 of the EU acquis, which covers intellectual property rights, is particularly important for protecting creativity and supporting innovation. This study, the first comprehensive assessment of the economic contribution of copyright-based industries in Albania, provides valuable evidence to inform policymaking and strengthen the enabling environment for the country's creative industries.

This study demonstrates the power of partnership between Albanian institutions and international stakeholders work hand in hand around a shared goal. Supported by GIZ on behalf of the German Federal Ministry for Economic Cooperation and Development, this work brings new knowledge and evidence to an area with growing importance for Albania's economic and European future.

GIZ remains committed to working alongside our Albanian partners to strengthen institutions, advance European integration and create opportunities for sustainable economic development. We trust that this study will contribute to a continued dialogue among public institutions, the private sector and the creative community, and help turn its findings into meaningful action for Albania's future.

Jule Petra Schultz

Country Director

GIZ Albania

Acknowledgements

This document has been prepared with the financial assistance of the German Government, implemented through the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH. The views expressed herein are those of the authors and cannot in any way be taken to reflect the official opinion of GIZ or the German Government.

The preparation of this document benefited greatly from the support and contributions of the GIZ Albania staff. The authors express their sincere gratitude to the Directorate of Copyright for its invaluable support throughout this study. We also thank the Bank of Albania and the General Directorate of Customs for providing the data used in the analysis, as well as SUADA and the collective management organizations for their valuable contributions and cooperation.

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List of Abbreviations:

ACL	Albanian Copyright Law
AKEP	Authority of Electronic and Postal Communications
AKDIE	Agency for the Collective Administration of Performers' Rights
ALL	Albanian Lek
AMA	Audiovisual Media Authority
BH	Charges for the use of intellectual property n.i.e. (BPM6 trade code)
BJ200	BPM6 Computer Services Classification Code
BoA	Bank of Albania
BoP	Balance of Payments
BPM6	Balance of Payments and International Investment Position Manual, Sixth Edition
CAC	Copyright Attribution Coefficient
CBI	Copyright-Based Industry
CBIs	Copyright-Based Industries
CD	Copyright Directorate
CISAC	International Confederation of Societies of Authors and Composers
CMO	Collective Management Organization
CMOs	Collective Management Organizations
CRM Directive	Collective Rights Management Directive (Directive 2014/26/EU)
VKM	Vendim i Këshillit të Ministrave (Albanian abbreviation for Decision of the Council of Ministers, DCM)
DSM	Digital Single Market
EU	European Union
EUR	Euro
FAAD	Audiovisual, Artistic and Documentary Film Agency
FTE	Full-Time Equivalent
GDP	Gross Domestic Product
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
GVA	Gross Value Added
HS	Harmonized System
ICT	Information and Communication Technology
IMF	International Monetary Fund
INSTAT	Institute of Statistics of Albania
IP	Intellectual Property
IPR	Intellectual Property Rights
ISP	Internet Service Provider
ISIC Rev.4	International Standard Industrial Classification of All Economic Activities, Revision 4
IT	Information Technology

LFS	Labour Force Survey
MTCS	Ministry of Tourism, Culture and Sports
NACE Rev.2	Statistical Classification of Economic Activities in the European Community, Revision 2
NCC	National Copyright Council
ND	Non-Dedicated Copyright Factor
OECD	Organisation for Economic Co-operation and Development
OSHMA	Audiovisual Media Service Providers (<i>Ofruesit e Shërbimeve Mediatike Audiovizive</i>)
PPP	Purchasing Power Parity
QKSH	National Center of Cinematography
RTSH	Albanian Radio Television (<i>Radio Televizioni Shqiptar</i>)
SAA	Stabilisation and Association Agreement
SatCab	Satellite and Cable Directive (Directive 93/83/EEC)
SatCab II	Online Transmissions Directive (Directive (EU) 2019/789)
SBS	Structural Business Statistics
SIMS	State Inspectorate for Market Surveillance
SNA 2008	System of National Accounts 2008
SUADA	One-Stop Shop for Copyright Administration (<i>Single Unified Administration of Authors' Rights</i>)
SUT	Supply and Use Tables
ToR	Terms of Reference
TRIPS	Agreement on Trade-Related Aspects of Intellectual Property Rights
UCC	Universal Copyright Convention
VAT	Value Added Tax
DCM	Decision of the Council of Ministers (<i>Vendim i Këshillit të Ministrave</i>)
WCT	WIPO Copyright Treaty
WIPO	World Intellectual Property Organization
WPPT	WIPO Performances and Phonograms Treaty

Executive Summary

This study presents Albania's first comprehensive assessment of the economic contribution of copyright and related rights-based industries, conducted in conformity¹ with the WIPO Methodology for Estimating the Economic Contribution of the Copyright Industries (2015). The study covers the reference period 2020–2024 and draws on data from the Institute of Statistics (INSTAT), the Bank of Albania, collective management organizations (CMOs), Customs Administration SUADA and comparator WIPO studies.

Albania's copyright and related rights-based industries collectively contributed **an estimated 4.31% of GDP in 2024**, equivalent to ALL 108.6 billion (approximately EUR 1,048 million). Core copyright industries alone **accounted for 3.34% of GDP**, up from 2.98% in 2020, reflecting growth driven mostly by the software and IT services sector. Total GVA across all four WIPO categories grew from ALL 63.0 billion in 2020 to ALL 108.6 billion in 2024, an increase of 72.4% in nominal terms over five years.

The IT and software sector (NACE 62–63) emerged as the dominant engine of growth, with GVA more than doubling from ALL 14.0 billion (2020) to ALL 28.2 billion (2024) and employment nearly doubling from 5,938 to 11,705 people. By 2023, software accounted for 34.9% of all Core Copyright industry GVA. The arts, entertainment, and culture sector also showed strong growing trend, with attributed GVA expanding 122% over the same period.

Total copyright industry employment reached **40,535 people in 2023** (the latest year for which INSTAT Labor Force Survey

data are available), representing **3.38% of the national workforce**, up from 2.50% in 2020. Employment growth of 38% over three years significantly outpaced the national labor market (approximately 2.3% over the same period), confirming the sector's role as a dynamic source of skilled employment.

Albania's copyright services trade underwent a structural transformation over 2008–2024, reversing from a deficit of EUR – 29.7 million (2014) to an attributed surplus of EUR +63.4 million (2024). Computer services exports (software) grew from EUR 9.5 million to EUR 206.1 million in raw BoP terms (EUR 103.0 million after 0.50 copyright attribution) over the same decade, a compound annual growth rate of 36%. Software now represents 70.2% of all copyright service exports (after a 0.50 copyright attribution factor).

An **important structural caveat** needs to be emphasized: Albania's IT export sector is predominantly composed of staff augmentation and outsourced development services, where Albanian developers create copyrightable software under contract for foreign clients who retain the intellectual property rights. While the WIPO methodology and BPM6 classification correctly include these flows (the 0.50 copyright attribution factor already discounts for non-copyright IT services), the copyright ownership and associated economic rents accrue primarily to the foreign contracting party. Albania ***captures labor value rather than IP value from these exports***. This distinction carries direct policy implications: transitioning the IT sector from staff augmentation toward

¹ An adaptation of the WIPO methodology is the integration of a gender analysis of the Copyright industries, as requested by GIZ ToRs.

proprietary software products and platforms would convert the same export volume into higher-value copyright assets for the Albanian economy (see Section 6.3 for detailed analysis). Additionally, a structural IP royalties deficit persists (EUR –23.9 million in 2024), reflecting dependence on foreign software platforms and media content.

International benchmarking places Albania's estimated 4.31% GDP contribution just below the WIPO global average of 4.9%. This represents strong performance, driven by the software sector's disproportionate size. Albania's copyright trade surplus contrasts sharply with the structural deficits recorded in both Kosovo (EUR – 81.5 million) and Serbia (EUR – 545 million).

Albania's copyright framework is based on Law No. 35/2016 on Copyright and Related Rights, as amended, which underwent a comprehensive improvement through amendments adopted by the Parliament of Albania on 10 July 2026.² The reform substantially strengthens Albania's alignment with the EU copyright acquis by introducing provisions implementing key elements of Directive (EU) 2019/790 on Copyright in the Digital Single Market (DSM Directive), Directive (EU) 2019/789 on

Online Transmissions and Retransmissions (SatCab II Directive), Directive 2014/26/EU on Collective Rights Management (CRM Directive), as well as further aligning national legislation with the broader EU copyright framework.

While the legislative approximation process has advanced significantly, effective implementation through secondary legislation, institutional capacity building and enforcement will remain essential for achieving full practical compliance with EU standards.

Key policy priorities emerging from this study include: (i) sustaining support for the software export sector; (ii) reducing the intellectual property (IP) royalties deficit through increased domestic IP creation, commercialisation and strengthened collective management organisations (CMOs); (iii) ensuring the effective implementation of the July 2026³ copyright reform through timely secondary legislation, institutional capacity building and consistent enforcement; (iv) strengthening copyright enforcement in the digital environment; and (v) establishing a dedicated copyright industry satellite account within INSTAT to support regular monitoring and evidence-based policymaking.

Key Findings at a Glance

Indicator	Estimate (Reference Year)
Share of GDP – All Copyright Industries	4.31% (2024)
Share of GDP – Core Copyright Industries only	3.34% (2024)
Total employment in copyright industries	40,535 workers (2023, latest LFS)
Share of total employment	3.38% (2023)
Copyright services exports	EUR 146.7 million (2024)

² As of 28 July 2026, the approved law had not yet been published in the Official Gazette. For the purposes of this study, the text and adoption date of the amendments have been sourced from the official notification published on the website of the Ministry of Tourism, Culture and Sports (MTCS) and from the documents available on the website of the Parliament of Albania (Kuvendi). Readers should verify the final published text against the Official Gazette once issued, as minor

drafting or numbering changes may occur prior to publication. <https://mtks.gov.al/en/newsroom/miratohet-projektligji-per-ndryshimet-ne-ligjin-per-te-drejtat-e-autorit-dhe-te-drejtat-e-tjera-te-lidhura-me-to/> <https://www.parlament.al/dokumentacioni/aktet/d0d81558-cda3-4816-8f3c-3b39f9643fb2>

³ See footnote 2 above, regarding the publication status of the July 2026 amendments.

Chapter 1: Introduction and Policy Context



1.1 Purpose and Scope of the Study

This study aims to quantify and characterize the economic contribution of copyright and related rights-based industries to the Albanian economy, using the WIPO Guide on Surveying the Economic Contribution of the Copyright Industries (2015 edition) as the primary methodological reference. It is the first such study ever conducted in Albania and is intended to: (i) generate baseline economic data on a previously unmeasured sector; (ii) support evidence-based policymaking in intellectual property, cultural policy, and creative industries; and (iii) position Albania comparably to peer countries that have completed similar studies.

The study matters for Albania at a specific juncture. The country's creative and digital economy has grown rapidly: software exports alone rose from EUR 9.5 million in 2014 to over EUR 206 million in 2024, yet this expansion remains largely invisible in national policy frameworks. Copyright industries are not separately tracked in INSTAT's national accounts, are absent from the National Development Plan's industrial policy targets and receive no dedicated attention in the employment or skills strategies. The National Strategy on Intellectual Property (2022–2025), approved by the Council of Ministers (DCM No. 350/2022), explicitly identified the need for an economic measurement of copyright-based industries as a priority action a gap that this study directly addresses. A successor national IP strategy is currently under preparation, and this

study is intended to serve as the evidence base for its copyright-industry targets. Without a rigorous baseline measurement, policymakers cannot assess the sector's contribution, allocate resources effectively, or design targeted interventions."

This study also has a regional dimension. Comparable WIPO methodology studies have been completed for Kosovo (data 2019), Serbia (data 2012), and the Netherlands (data 2022, published 2025), among more than 60 countries globally⁴. Albania's absence from this body of evidence is a gap that limits regional benchmarking and weakens the evidence base for bilateral and EU-level negotiations on intellectual property. Completing this study places Albania on the international map of copyright industry measurement and enables meaningful cross-country comparison.

1.2 Policy Rationale

Creative and knowledge-based industries have emerged as significant drivers of value added, employment, and innovation in both developed and developing economies. Globally, WIPO estimates that copyright-based industries contribute between 4% and 11% of GDP across countries that have conducted measurement studies and typically account for 3–8% of national employment⁵. In Albania, the creative sector (including publishing, audiovisual production, software, music, and design⁶) remains largely unmeasured in national accounts, understated in trade statistics, and

⁴ All references in this study to a country's study year denote the reference year of the underlying data, which can differ from the publication year. For example, the Netherlands study was published in 2025 but uses 2022 data.

⁵ WIPO (2017), WIPO Studies on the Economic Contribution of the Copyright Industries (overview), World Intellectual Property Organization, Geneva. WIPO Publication No. 1031E. Available at

<https://www.wipo.int/copyright/en/performance/>. The 4–11% of GDP and 3–8% of employment ranges reflect aggregated findings from completed national studies applying the WIPO methodology.

⁶ The term used here may be more appropriate in the context of works of applied arts- see Art. 8 (f) and 39 (1) of ACL.

underrepresented in intellectual property policy. This study addresses that gap.

The study responds directly to Albania's commitments under the EU accession process. Chapter 7 of the EU acquis (Intellectual Property Law) requires alignment with the full body of EU copyright directives, including the Digital Single Market Directive (2019/790) and the SatCab II Directive (EU) 2019/789, and CRM Directive 2014/26/EU. The European Commission's annual Progress Reports on Albania have consistently noted the need for stronger copyright enforcement and more transparent collective management. Demonstrating the economic weight of copyright industries provides an evidence base that strengthens Albania's negotiating position and justifies the institutional investment needed for full compliance.

At the national level, Albania's National Strategy for Culture (2019–2025) identifies the creative economy as a priority area but lacks quantitative benchmarks to measure progress. The National Strategy on Industrial Property (2022–2025), approved by the Council of Ministers, sets enforcement and awareness targets but does not include economic impact indicators. This study establishes the quantitative baseline needed for the next policy cycle, including any successor national IP strategy following the expiry of the 2022–2025 cycle.

The results are intended to serve multiple audiences: policymakers in the Ministry of Culture, Tourism, and Sports (MTCS), the

Copyright Directorate; Ministry of Economy and Innovation; the General Directorate of Industrial Property; INSTAT as the national statistical authority; creative industry stakeholders and collecting societies; and international development partners.

1.3 Reference years

The study covers the territory of the Republic of Albania. The primary reference year for quantitative analysis is 2024, selected as the most recent year for which INSTAT national accounts, Structural Business Survey, and Bank of Albania balance of payments data were available at the time of analysis. Trend analysis draws on the period 2020–2024, providing a five-year window. For certain indicators, particularly foreign trade in services, longer time series (2008–2024) are presented where Bank of Albania data permit. International comparisons use the most recent available data year for each comparator: Kosovo (data 2019), Serbia (data 2012), and the Netherlands (data 2022, study published 2025). These differences in the reference year of the underlying data, which can differ significantly from each study's publication year, should be borne in mind when interpreting cross-country comparisons, particularly for fast-moving sectors such as software and digital services. All comparisons use the same WIPO methodology, ensuring structural comparability despite the temporal differences.

Chapter 2: Legal, Regulatory and Institutional Framework



Albania has developed a substantive copyright and related rights framework over the past two decades, driven by a combination of constitutional commitment, international treaty obligations, and the imperatives of European integration. This chapter maps that framework in full: the legislative architecture, the copyright attribution system, the collective rights

management ecosystem, the enforcement architecture, the institutional actors, and the EU accession alignment trajectory. Together, these form the enabling environment in which the economic contribution measured in Chapters 5, 6, and 9 is generated and where the framework is effectively protected.

KEY FINDINGS

- Albania's copyright law (ACL No. 35/2016, as amended 2022) is broadly aligned with EU acquis, with full transposition of five key directives and partial alignment with six more
- Four licensed Collective Management Organizations (CMOs) operate within a One-Stop Shop (SUADA) structure since 2021, centralising tariff collection and distribution
- The July 2026 amendments⁷ modernise Albania's copyright regime by introducing provisions implementing key elements of Directive (EU) 2019/790 (Digital Single Market), Directive (EU) 2019/789 (Online Transmissions and Retransmissions), strengthening collective rights management in line with Directive 2014/26/EU, and further aligning the legislation with the broader EU copyright acquis. The Copyright Directorate under MTCS is the primary competent authority; supported by NCC, SIMS, AMA, AKEP, Customs, and the State Police
- The institutional framework is operationally active; remaining gaps lie in CMO revenue transparency, enforcement capacity, and digital-era regulatory tools

2.1 Development of Albania's Copyright Framework

Albania's intellectual property framework covers both industrial property and copyright and related rights, built on a combination of primary and secondary legislation that governs how these rights are managed, protected, and enforced. Copyright and related rights play a particularly important role: they are not only legal tools for protecting creative expression, but also key drivers of creativity, innovation, and economic growth. Their importance has become even more evident as creative industries expand, technology evolves, and legal certainty

becomes increasingly critical in the digital environment.

Copyright protection in Albania finds recognition at the constitutional level. Article 58 of the Albanian Constitution provides that: "Freedom of artistic creation and scientific research, their application, as well as benefiting from their achievements, are guaranteed for all" and further stipulates that "Copyright is protected by law." This constitutional recognition is complemented by Albania's accession to the following key international instruments:

- The Berne Convention for the Protection of Literary and Artistic Works⁸;

⁷ See footnote 2 above, regarding the publication status of the July 2026 amendments.

⁸ Berne Convention: Decree No. 487, dated 09.03.1993, Official Gazette No. 4, 09.04.1993

- Convention Establishing the World Intellectual Property Organization⁹;
- The Universal Copyright Convention (UCC)¹⁰;
- The Agreement on Trade-Related Aspects of Intellectual Property Rights (TRIPS)¹¹;
- WIPO Copyright Treaty (WCT)¹²;
- Marrakesh Treaty to Facilitate Access to Published Works for People who are Blind, Visually Impaired or Otherwise Print Disabled¹³;
- Rome Convention for the Protection of Performers, Producers of Phonograms and Broadcasting Organisations¹⁴;
- The Geneva Phonogram Convention¹⁵;
- WIPO Performances and Phonograms Treaty (WPPT)¹⁶.

From the EU standpoint, a broader framework for intellectual property protection began to emerge in the context of Albania's European integration process, particularly with the signing of the Stabilization and Association Agreement (SAA) with the European Union in 2006, which entered into force on 1 April 2009¹⁷. Under Articles 70 and 73 of the SAA on Intellectual Property Rights, Albania is required to ensure the same level of intellectual property protection as EU member states. After Albania was granted EU candidate status in June 2014, important reforms were undertaken across IP law. In this context, Law No. 9380/2005 "On Copyright and Related Rights" as amended was repealed and replaced in 2016 by Law No. 35/2016, the Albanian Copyright Law (ACL), which represents a

significant step forward in strengthening copyright protection in the country.

In 2021, following extensive consultations with the European Commission, the Ministry of Culture prepared further amendments to Law No. 35/2016, which entered into force in 2022. These amendments introduced sixteen new provisions to regulate orphan works, expanded access for blind and visually impaired people, and strengthened the clarity and effectiveness of the collective management system. The legislative framework is complemented by other statutes including the Civil Code, the Codes of Civil and Criminal Procedure, the Criminal Code, the Customs Code, and the Labour Code, as well as nearly 20 sub-legal acts, including the National Strategy on Intellectual Property (2022–2025)¹⁸.

2.2 Overview of Albanian Copyright Law (ACL No. 35/2016) as amended

Albania's copyright system is governed by Law No. 35/2016 "On Copyright and Related Rights", which constitutes the principal legislative framework regulating copyright and neighbouring rights. Since its adoption, the Law has undergone successive amendments aimed at progressively approximating Albanian legislation with the European Union *acquis* under Chapter 7 (Intellectual Property Law) of the accession negotiations.

The most significant reform was adopted by the Parliament of Albania on 10 July

⁹ WIPO Convention: Law No. 8993, dated 30.01.2003, Official Gazette No. 6, 20.02.2003

¹⁰ UCC: Law No. 9129, dated 08.09.2003, Official Gazette No. 83, 06.10.2003

¹¹ TRIPS: Law No. 9950, dated 10.07.2008, Official Gazette No. 122, 31.07.2008

¹² WCT: Law No. 8838, dated 22.11.2001, Official Gazette No. 57, 21.11.2001

¹³ Marrakesh Treaty: Law No. 67/2025, Official Gazette No. 238, 23.12.2025

¹⁴ Rome Convention: Law No. 8579, dated 16.02.2000, Official Gazette No. 6, 04.05.2000

¹⁵ Geneva Phonogram Convention: Law No. 8585, dated 15.03.2000, Official Gazette No. 7, 04.12.2000

¹⁶ WPPT: Law No. 8740, dated 15.02.2001, Official Gazette No. 7, 16.03.2001

¹⁷ Law No. 9590, dated 27.07.2006, the Stabilization and Association Agreement. Official Gazette No. 87, dated 14.08.2006; L. 107/166, Official Journal of the European Union, 28.04.2009.

¹⁸ Council of Ministers Decision No. 350, dated 26.05.2022, "On the approval of the National Strategy for Intellectual Property 2022–2025." Official Gazette No. 85, 07.06.2022.

2026¹⁹. The amendments modernise the legal framework to address digital uses of protected content, strengthen collective rights management, improve licensing mechanisms, expand copyright exceptions and limitations consistent with EU law, introduce rules concerning online transmissions and retransmissions, reinforce the protection of press publishers, regulate out-of-commerce and orphan works, and improve transparency and governance requirements applicable to collective management organisations.

The amendments also strengthen the institutional framework by expanding the competences of the Directorate General of Copyright (DPDA) and introducing additional regulatory and supervisory mechanisms designed to improve enforcement and the functioning of the copyright system. The purpose of the ACL is to guarantee the protection of copyright and other related rights. It provides for: the protection of copyright and other related rights in respect of works of literary, artistic, and scientific fields; the protection of related rights of performers, phonogram producers, film producers, broadcasting organisations, publishers, and database producers; the protection of computer programs and audiovisual works under special provisions; individual and collective administration of copyright and related rights; sui generis protection of database creators; and protection against infringement of copyright and related rights.

2.2.1 Scope and Subject Matter

The subject matter of copyright consists of any original intellectual creation in the fields of literature, art, and science that bears individual characteristics, regardless of the manner or form of expression, purpose, or importance, unless otherwise provided by the ACL. The works that qualify for copyright protection are primarily covered by Article 8 of the ACL. The law protects both original and derivative works; creations excluded from copyright protection are covered by Article 12. Copyright protection arises automatically from the moment of creation and does not depend on registration or publication. Authors may voluntarily register works in a dedicated register maintained by the Copyright Directorate; such registration has legal effect unless refuted by a court decision²⁰. Registration procedures, organization, classification, and registration fees are determined by a decision of the Council of Ministers.

2.2.2 Moral Rights

Moral rights are covered in Section 1 of Chapter III (Articles 21–24) of the ACL. They cannot be waived, transferred, licensed, or otherwise alienated, nor are they subject to prescription. These rights include: the right of disclosure (to make the work available to the public for the first time); the right of attribution (to be recognized and mentioned as the author); the right of integrity (to protect the work's integrity and the author's honour and reputation); and the right of withdrawal (to withdraw permission for exploitation of the work).

¹⁹ See footnote 2 above, regarding the publication status of the July 2026 amendments.

²⁰ Council of Ministers' Decision No. 460, dated 10 July 2024, on the determination of the procedures for registration, organisation,

classification, and registration fees of copyright works. Official Gazette No. 119, dated 12 July 2024 (repealing DCM No. 34, dated 18 January 2017).

2.2.3 Economic Rights

Economic rights are transferable and grant authors or rights holders' exclusive control over reproduction, distribution, rental communication to the public, and adaptation of the work. These exclusive rights are covered in Chapter III, Section 2 of the ACL. Section 3 of Chapter III also sets out additional economic rights related to specific categories of works, such as remuneration for the reproduction of authors' works for private and other personal use, the public lending right, the resale right, and other rights related to specific categories of works, such as photographs, works of applied art, and works of architecture. Economic rights form the legal foundation for licensing revenue, royalty flows, and the commercial transactions that generate the economic contribution measured in Chapters 5 and 6 of this study.

2.2.4 Related Rights

Subjects of related rights include performers, phonogram producers, first-fixation film producers, broadcasting organisations, publishers, and database producers. These rights are protected in accordance with the nature of each category, as provided in the specific provisions of the ACL. Related rights particularly are economically significant in Albania's audiovisual, music, and broadcasting sectors, industries that form part of the Core Copyright Industries analyzed in Chapter 5.

2.3 Collective Rights Management - CMO Ecosystem

2.3.1 Legal Framework for Collective Management

Part V of the ACL expressly governs the administration of copyright and related rights. Rights may be administered individually for each work, or collectively through Collective Management Organisations (CMOs) that administer multiple works by multiple authors simultaneously. The activities involved in rights administration include: granting authorisation for use of protected subject matter; collecting remuneration; distributing collected remuneration to rightsholders; monitoring use; and initiating enforcement procedures in cases of infringement.

The collective administration of rights is governed by Article 130 of the ACL, while Article 131 sets out rights subject to mandatory collective administration. In cases of mandatory collective management, a presumption of representation is established: the relevant CMO is deemed ipso jure to represent all rightsholders within the relevant category of rights and repertoire, regardless of membership. CMOs are licensed by the ministry responsible for copyright, upon proposal from the Copyright Directorate; licences are valid for three years and may be renewed.

2.3.2 Licensed Collective Management Agencies (2024)

The most recent licensing and renewal process was completed in 2024, resulting in four active CMOs:

Acronym	Full Name	Rights Category	Key Role
ALBAUTOR	Agency for the Collective Management of Authors' Rights	Literary, artistic, and scientific works	Largest CMO by membership and revenue; manages public performance and broadcasting rights
A.K.D.I.E.	Agency for the Collective Administration of Performers' Rights	Performers' rights (related rights)	Manages remuneration for performers in the music and audiovisual sectors
Faber Collective	Agency Faber Collective Phonogram	Phonogram producers' rights	Collects neighboring rights remuneration for recorded music producers
F.A.A.D.	Audiovisual, Artistic, and Documentary Film Agency	Authors' and producers' rights in audiovisual works	Manages rights in films, documentaries, and audiovisual productions

Note: Source: Albanian Copyright Directorate, MTCS

Beyond the formal licensing structure, stakeholder consultations conducted for this study – reveal significant variation in operational capacity and institutional maturity across the four CMOs. The following operational profiles are based on primary interview data and CMO self-reported information.

ALBAUTOR. ALBAUTOR is registered as a non-profit since 1998 and operating under periodically renewed licences. It represents over 300 authors and right holders, primarily in the music sector. Through approximately 84 reciprocal agreements with foreign CMOs, ALBAUTOR ensures representation of foreign repertoires in Albania and generates income for Albanian works abroad. A defining feature of its revenue structure is that approximately two-thirds of income originates from international collections, highlighting both the importance of global integration including CISAC membership and the relative weakness of domestic collection mechanisms. ALBAUTOR operates with approximately four staff members and relies on external expertise

for legal services, economic analysis, and IT support.

AKDIE. AKDIE represents 557 Albanian performing artists and, through reciprocal agreements with 29 countries, indirectly covers approximately 300,000 foreign right holders. It operates with minimal capacity, one director supplemented by outsourced IT, legal, and monitoring services. Administrative costs account for approximately 30% of revenues. AKDIE characterizes the Albanian copyright market as early-stage, with weak enforcement and insufficient inspection mechanisms significantly constraining effectiveness.

FABER. FABER, licensed in 2021 to represent phonogram producers, is a relatively new entrant. Its institutional development is still evolving, and operational data remain limited. Like other CMOs, FABER's effectiveness is closely tied to the broader performance of the centralised collection system.

FAAD. FAAD, the newest CMO (licensed 2024), represents 120 audiovisual authors

and 32 producers, with membership growing. It operates with one employee and relies almost entirely on income from 18 international reciprocal agreements, as domestic collection through SUADA remains largely non-functional. FAAD estimates the market value of copyright-related audiovisual revenues at approximately EUR 20 million, a figure that remains largely unrealised due to weaknesses in collection, enforcement, and institutional coordination.

A common theme across all four CMOs is the tension between formal institutional design and operational reality. While the legal framework assigns each CMO a clearly defined mandate within the copyright value chain, limited staffing, constrained budgets, weak domestic collection, and the dysfunction of the centralised collection mechanism (SUADA) have reduced their role to partial intermediation rather than full economic facilitation of the creative sectors they represent.

2.3.3 SUADA: The One-Stop Shop

A significant institutional development in Albanian copyright management was the creation of the One-Stop Shop (S.U.A.D.A.). From a legal perspective, SUADA is based on Article 138 of the ACL, as amended, and is further regulated through sub-legal acts. It operates as a legal entity registered as a non-profit organisation. SUADA brings all licensed CMOs together within a single centralised structure, making authorisation

procedures easier and reducing transaction costs for users. It operates with a unified remuneration tariff methodology covering all categories of rights. Its core role is to collect remuneration tariffs from users and distribute them to rightsholders through the licensed CMOs in proportions provided under the ACL. Since SUADA's establishment, individual CMOs have no longer been permitted to collect revenues independently.

The SUADA model represents a meaningful institutional advance: it reduces the fragmentation that previously characterised the Albanian collective management system and creates a single point of accountability for tariff collection and distribution. SUADA's 2024 monitoring data, obtained for this study, provide the first comprehensive picture of the Albanian collective management system's financial flows. Total revenue collected in 2024 amounted to ALL 42.5 million (approximately EUR 410,000), of which ALL 26.8 million (63.1%) was distributed to the three licensed CMOs, ALL 6.1 million (14.4%) was retained as administrative costs, and ALL 9.2 million (21.6%) was remitted as VAT. The effective administrative ratio of 22.9% of net (pre-VAT) revenue is broadly comparable to CMO benchmarks in EU accession countries, though it is elevated relative to the 10–15% range observed in more mature collective management systems.

Table 2.1a: SUADA 2024 Revenue Distribution by CMO

CMO	Amount (ALL)	Share (%)
AKDIE (performers' rights)	12,002,113	44.8
Faber Collective Phonogram (sound recordings)	8,398,695	31.4
Albautor (authors' rights)	6,369,630	23.8
Total distributions	26,770,438	100.0

Note: Source: SUADA 2024 annual monitoring data. ALL figures.

The revenue composition by payer category reveals a highly concentrated collection base: audiovisual media service providers (OSHMA – Ofruesit e Shërbimeve Mediatike Audiovizive, the regulatory category under Law 97/2013 as amended, covering all licensed broadcasters, both the public broadcaster RTSH and private operators) account for 72.9% of total revenue, followed by hotels (12.4%), commercial establishments (9.9%), and the private copying levy (3.7%, or ALL 1.56 million / approximately EUR 15,100). This concentration creates a sector-level vulnerability: the system's financial sustainability depends overwhelmingly on a single regulated sector, with very limited contribution from the long tail of commercial users (restaurants, retail, fitness centres) that copyright law also covers. Broadening the payer base into these commercial categories represents the most significant growth opportunity for SUADA's collection volumes.

Stakeholder consultations reveal a more complex operational picture than the financial data alone suggest. SUADA was established to reduce fragmentation by creating a single licensing and collection point, replacing the previous system where each CMO collected independently. In principle, this centralised model, should improve compliance, reduce administrative burden, and ensure more predictable

income flows to creators. In practice, however, SUADA's performance has been constrained by governance weaknesses, declining operational capacity, and the absence of enforcement authority.

SUADA's governance structure includes all licensed CMOs, ensuring formal representation but complicating consensus-based decision-making. Stakeholders report that the absence of clear mechanisms to resolve disagreements has, since approximately 2022, contributed to operational paralysis. The organisation's staffing has declined from approximately 15 employees in 2019, when it maintained dedicated field teams conducting on-site monitoring and data collection, to approximately four employees at present. This reduction has severely limited operational reach.

A fundamental constraint is that SUADA lacks enforcement authority: it can issue notifications and coordinate licensing processes but cannot compel payment. Proposals to grant SUADA executive title status, which would enable more direct enforcement of claims, have not been accepted. As a result, SUADA depends on external institutions whose cooperation has been limited. The State Inspectorate for Market Surveillance (SIMS) conducts only 230–300 inspections annually, based primarily on risk assessment, against an

estimated 36,000 entities that are potential users of copyrighted content. This enforcement gap is a primary driver of the low collection rates documented above.

Compliance by public institutions remains particularly problematic. RTSH, the public broadcaster, is legally required under the ACL to allocate 1% of its budget to SUADA and to contribute to awareness-raising through dedicated programming. As of early 2026, neither obligation is being fulfilled. Similarly, the Audio-visual Media Authority (AMA) was described in consultations as lacking a proactive role in copyright enforcement, and tax authorities show limited interest in supporting collection activities).

Several reform proposals emerged from consultations. The most substantive is the integration of copyright tariffs into existing billing systems, such as utility invoices or local tax collection mechanisms, which could embed copyright payments into routine financial obligations and significantly improve compliance. Additional priorities include the establishment of a centralised works registry with unique identification codes, the development of integrated digital monitoring systems, and the strengthening of institutional coordination between SUADA, the Copyright Directorate, SIMS, and AMA.

2.4 Enforcement Framework

The legal framework establishes a comprehensive system of copyright enforcement, encompassing civil, administrative, and criminal remedies.

2.4.1 Civil Enforcement

In the event of a civil infringement, authors or rightsholders may file a civil lawsuit before the Court of First Instance of

General Jurisdiction in Tirana. Available civil remedies include: orders to stop the infringement; compensation for damages; compensation and remuneration for unauthorised use; publication of the court decision; and orders for the destruction, alteration, or surrender of illegally reproduced copies. Civil action may also be used to protect moral rights, obtain relevant information, and include interim or provisional measures to stop ongoing violations and preserve evidence.

2.4.2 Administrative Enforcement

Administrative inspection and sanctions are provided in Part IX of the ACL. The State Inspectorate of Market Surveillance (SIMS) is the primary administrative enforcement authority, responsible for monitoring and enforcing compliance with copyright law at the market level. SIMS decisions may be appealed through applicable administrative procedures. Customs measures may additionally be used to prevent the import or export of infringing goods, under the coordination of the Customs Administration Directorate.

In practice, administrative enforcement capacity is severely limited. Stakeholder consultations indicate that SIMS operates with approximately 10 inspectors responsible for overseeing compliance across an estimated 36,000 entities that use copyrighted content including broadcasters, hotels, restaurants, bars, retail shops, fitness centres, barbers, and taxi services. This results in only 230–300 inspections annually, conducted primarily on a risk-assessment basis rather than through systematic coverage. Sanctions are rarely applied, and the deterrent effect of enforcement is correspondingly weak.

The Audio-visual Media Authority (AMA), which holds a regulatory mandate over

audiovisual media services, was consistently described in consultations as lacking a proactive role in copyright enforcement. Legal enforcement through the courts is similarly constrained: only a small number of copyright cases are pursued due to the high costs of litigation and enforcement procedures. As a result, prior authorisation requirements, for example the legal obligation to obtain copyright clearance before concerts and public performances, are rarely enforced in practice.

2.4.3 Criminal Enforcement

Where an infringement constitutes a criminal offence, criminal liability may arise. Infringers may be punished with a fine or imprisonment under applicable provisions of the Criminal Code. These sanctions protect both the economic and moral rights of authors. Criminal enforcement is primarily handled through the State Police's Sector for Economic and Financial Crime, which is responsible for preventing, detecting, documenting, and combating unlawful activities including criminal copyright offences. The prosecution and the courts also play a central role in the enforcement process.

2.5 Institutional Architecture

Albania's copyright institutional framework involves multiple agencies with distinct but interrelated mandates. Table 2.1 maps the principal institutional actors, their legal basis, and their operational roles.

Table 2.1: Albania – Principal Copyright Institutional Actors

Institution	Ministry / Portfolio	Legal Basis	Key Copyright Role
Copyright Directorate (CD)	Ministry of Tourism, Culture and Sport (MTCS)	ACL Art. 157	Central policy authority; proposes draft legislation; oversees CMO licensing; monitors collective management; raises public awareness; collaborates with enforcement bodies
National Copyright Council (NCC)	Under MTCS	ACL Art. 136, 142–147, 151, 156, 160, and 161	Determines remuneration tariffs when CMOs and users' associations fail to agree; secretariat provided by the Copyright Directorate. New tariff methodology approved 2025.
SIMS – State Inspectorate of Market Surveillance	Inspectorate	Inspections legislation; ACL Part IX ²¹ DCM, ACL Art. 178 and Part IX	Administrative inspection and sanctions at market level; coordinates with customs, tax authorities, State Police, and economic crime units

²¹ SIMS established by DCM No. 36, dated 20.01.2016, as amended (Official Gazette No. 43, 18.03.2022). Activity also based on Law No. 99, dated 12.09.2024, "On Inspection in the Republic of Albania" (Official Gazette No. 192, 13.11.2024)

AMA – Audiovisual Media Authority	Independent regulatory body	Audiovisual law ²² ; ACL	Ensures broadcasters comply with copyright law; supervises transmission rights; cooperates with CD and law enforcement on infringement prevention
AKEP – Electronic & Postal Communications Authority	Independent regulatory body	Electronic communications law ²³	Requests ISPs to restrict access to websites hosting illegal content; contributes to online copyright protection; public awareness on unlawful internet use
Customs Administration Directorate	Ministry of Finance	Customs Code; ACL border measures	Border enforcement intercepts infringing imports and exports; coordinates with third-party institutions and rights holders
State Police – Economic & Financial Crime Sector	Ministry of Interior	Criminal Code; ACL ACL Art. 162.	Prevents, detects, documents, and combats criminal copyright offences; primary criminal enforcement body

Note: Source: Albanian Copyright Directorate, MTCS; relevant institutional mandates. Compiled by IDRA Research & Consulting 2024.

2.5.1 Private Copying Levy Framework (DCM 465/2023)

Albania established its private copying levy system through Council of Ministers Decision No. 465 of 26 July 2023, issued in implementation of Article 31 of Law No. 35/2016 on Copyright and Related Rights. The DCM 465/2023 designates 30 device and material categories organised in two annexes, re25 in Annex 1 (audio/visual recording equipment and media) and 5 in Annex 2 (photocopying equipment and paper) each subject to a 0.5% levy on declared customs value (for imports) or VAT-exclusive invoice value (for domestic production), collected by SUADA (One-Stop Shop for Copyright Administration) from importers and domestic manufacturers. The DCM 465/2023 does not itself specify HS tariff codes; under Article 9, the Directorate General of Customs is required

to notify SUADA and the Ministry of the applicable tariff codes.

Analysis of 2025 customs data (see also Chapter 6, Section 6.8 below) shows that imports falling within the general scope of DCM 465/2023 categories reached approximately EUR 274.1 million in 2025, distributed across 2,875 importing companies an upper-bound estimate of the gross taxable universe. DCM 465/2023 applies the 0.5% levy only to a subset of this value: computer systems sold with CD/DVD writers are subject to the levy on 7% of system value; internal hard disks are subject to the levy on 10% of system value; smartphones qualify only if they support MP3/MP4 playback with storage above 4 GB; and the "paper" category (Annex 2) excludes newsprint, tissue, packaging, and filter papers. Applying these rules yields an estimated effective taxable base of EUR

²² Article 19 and other relevant articles of Law No. 97/2013, "On audiovisual media in the Republic of Albania," as amended (Official Gazette No. 75, 10.05.2023)

²³ Article 12 of Law No. 54/2024, "On Electronic Communications in the Republic of Albania" (Official Gazette No. 102, 20.06.2024)

160–180 million and a theoretical annual levy of EUR 0.8–1.4 million. SUADA's 2024 monitoring data show that actual private copying levy collections amounted to ALL 1.56 million (approximately EUR 15,100), representing a collection rate of between 1.1% and 1.9% of this range. This gap indicates that the enforcement infrastructure for the levy remains largely non-operational.

The system also differs from EU practice in applying a single flat percentage rate (0.5% on customs/invoice value) rather than differentiated per-unit levies calibrated to device storage capacity and copying likelihood. However, the percentage-rate model itself is common practice in EU member states from Central and Eastern Europe (Poland, Czech Republic, Hungary, Romania), while Western European member states (France, Germany, the Netherlands, Austria) typically apply fixed per-unit levies. Albania's 0.5% rate is consistent with regional benchmarks in this latter group of EU member states (see Poort et al., *Private Copying Global Study 2026*, CISAC). The structural issue in Albania is therefore not the rate model or its level, but the operational implementation of collection: while EU systems typically achieve 80–95% of theoretical levy yield through customs data-sharing and importer registries, Albania's 1.1–1.9% effective collection rate represents an enforcement gap of two orders of magnitude. Closing this gap, rather than redesigning the rate model, is the priority policy action.

Recommendation: Given the persistently low collection rate (1.1–1.9%), an immediate operational review of the

revenue collection mechanism is warranted, focusing on:

- a) establishing systematic data-sharing between the Customs Administration and SUADA to identify liable importers.*
- b) implementing mandatory levy declaration at the point of customs clearance;*
- c) introducing penalties for non-compliance; and*
- d) assessing whether the flat 0.5% rate adequately compensates rights holders relative to differentiated per-unit models used in EU member states.*

An annual transparency report on revenue collections and distributions should be published, consistent with EU best practice under Directive 2014/26/EU on collective management of copyright.

2.6 EU Accession and Chapter 7 Alignment

Albania is an EU candidate country, and intellectual property, including copyright and related rights, forms part of Chapter 7 (Intellectual Property Law) of the EU acquis. Alignment with Chapter 7 requires not only legislative approximation with the EU copyright acquis but also effective institutional capacity, administrative implementation, judicial practice, and enforcement.

Prior to the legislative reform adopted by the Parliament of Albania on 10 July 2026²⁴, Albania had already achieved a relatively high degree of approximation through Law No. 35/2016 on Copyright and Related Rights and its subsequent amendments, including those adopted in 2022. Nevertheless, several important

²⁴ See footnote 2 above, regarding the publication status of the July 2026 amendments.

components of the Digital Single Market copyright package and related EU copyright instruments remained only partially transposed.

The July 2026 amendments ²⁵substantially advanced Albania's legislative approximation by introducing comprehensive provisions corresponding to Directive (EU) 2019/790 on Copyright in the Digital Single Market (DSM Directive), Directive (EU) 2019/789 on Online Transmissions and Retransmissions (SatCab II Directive), strengthening the collective rights management framework in line with Directive 2014/26/EU, and further aligning the legislation with Directive 2012/28/EU on Orphan Works and Directive (EU) 2017/1564 implementing the Marrakesh Treaty.

Consequently, Albania has significantly strengthened its copyright framework and its alignment with the contemporary EU copyright acquis. The effectiveness of this legislative approximation will now depend primarily on implementation through secondary legislation, institutional capacity, administrative and judicial practice, and effective enforcement.

2.6.1 Fully Transposed EU Directives

The following EU directives have been fully transposed into Albanian copyright law through Law No. 35/2016 and the 2022 amendments:

- Directive 2006/116/EC – Term of protection of copyright and certain related rights
- Directive 2004/48/EC – Enforcement of intellectual property rights

- Directive 2001/84/EC – Resale right for the benefit of the author of an original work of art
- Directive 96/9/EC – Legal protection of databases
- Directive 2009/24/EC – Legal protection of computer programs

2.6.2 EU Copyright Directives further approximated through the July 2026 amendments²⁶

The following directives have been partially transposed and represent the primary legislative alignment priorities for the current reform cycle:

- Directive 2001/29/EC (InfoSoc) – Harmonization of copyright and related rights in the information society, core digital-era provisions
- Directive 2006/115/EC – Rental right and lending right; certain rights related to copyright in the field of intellectual property
- Directive 93/83/EEC (SatCab) – Coordination of rules on copyright applicable to satellite broadcasting and cable retransmission
- Directive 2014/26/EU (CRM) – Collective management of copyright; multi-territorial licensing of musical works for online use
- Directive 2012/28/EU (Orphan Works) – Certain permitted uses of orphan works, new provisions added in 2022
- Directive (EU) 2017/1564 – Permitted uses for people who are blind, visually impaired, or print-disabled, new provisions added in 2022

²⁵ See footnote 2 above, regarding the publication status of the July 2026 amendments.

²⁶ See footnote 2 above, regarding the publication status of the July 2026 amendments.

2.7 Implementation Priorities and Future Directions

The adoption of the July 2026 amendments²⁷ marks the completion of the most significant reform of Albania's

copyright legislation since the enactment of Law No. 35/2016. As discussed in Section 2.6, the reform substantially advances legislative approximation with the EU copyright acquis and modernises the legal framework governing digital uses of protected content, collective rights management and online licensing.

From the perspective of this study, however, legislative reform represents only the first stage. The economic benefits of the new framework will depend on its

effective implementation. This includes the timely adoption of secondary legislation, strengthening the institutional capacity of the Directorate General of Copyright (DPDA), SUADA and enforcement authorities, enhancing digital copyright enforcement, improving transparency and governance within collective management organisations (CMOs), and developing administrative and judicial practice consistent with the new legal framework.

The successful implementation of these reforms is expected to improve legal certainty for creators, investors, digital service providers and users, while supporting the long-term development and competitiveness of Albania's copyright-based industries.

Table 2.2: Priority Legislative and Institutional Reform Actions, Copyright and Related Rights (2025–2027)

#	Reform Action	Timeframe
1	Adopt and implement secondary legislation required for the effective application of the July 2026 copyright amendments ²⁸	2026–2027
2	Strengthen implementation of the collective rights management framework, including multi-territorial licensing and governance of CMOs	2026–2028
3	Develop an Albanian Enterprise Survey on Copyright-Based Industries	2026–2027
4	Strengthen transparency, governance and financial reporting standards for Collective Management Organisations (CMOs)	2026–2028
5	Enhance digital copyright enforcement capacity within the State Inspectorate for Market Surveillance (SIMS) and other competent authorities	2026–2028
6	Strengthen inter-institutional coordination among the Directorate General of Copyright (DPDA), SIMS, AKEP, AMA, Customs Administration and the State Police	2027–2028

Note: Source: IDRA Research & Consulting analysis based on feasibility study (October 2023), and WIPO policy guidance. Timeframes are indicative.

²⁷ See footnote 2 above, regarding the publication status of the July 2026 amendments.

²⁸ See footnote 2 above, regarding the publication status of the July 2026 amendments.

Chapter 3: Analytical Framework and Classification of Albanian Industries



3.1 The WIPO Methodology - Overview

The WIPO Methodology, developed by the World Intellectual Property Organization and published in its Guide on Surveying the Economic Contribution of the Copyright Industries (2015 Revised Edition), provides a standardized framework for measuring the economic contribution of industries that create, produce, distribute, or depend on copyright-protected content. It classifies these industries into four groups and measures their contribution through three principal dimensions: gross value added (as a share of GDP), employment, and foreign trade in copyright goods and services.

The methodology focuses specifically on the economic contribution attributable to

copyright as an intellectual property right, which aligns directly with the policy objectives of strengthening Albania's copyright framework under EU accession requirements.

This framework has been adopted for Albania with contextual adaptations where data constraints or sector definitions require modification, in accordance with the flexibility provisions of the WIPO Guide.

3.2 The Four-Category WIPO Classification

The WIPO methodology organizes copyright-relevant economic activity into four distinct industry groups, each defined by the degree to which copyright is central to their core function. Table 3.1 summarizes the four categories and their defining characteristics.

Table 3.1: The Four WIPO Copyright Industry Categories

Cat.	Category Name	Definition	Albanian Examples
I	Core Copyright Industries	Industries whose primary purpose is to create, produce, distribute, or exhibit copyright materials. Copyright is wholly or primarily essential to their activities.	Publishing, music recording, film/TV production, software development, news agencies, photography, advertising, performing arts, printing
II	Interdependent Copyright Industries	Industries whose primary purpose is to facilitate or support copyright creation through production or sale of equipment and materials.	Paper products, consumer electronics, computers, musical instruments, IT hardware
III	Partial Copyright Industries	Industries in which a portion of activities relates to copyright, but this is not the primary function.	Architecture, fashion/textile design, furniture, glass/ceramics, jewellery
IV	Non-Dedicated Support Industries	Industries that support the distribution or sale of copyright materials as part of broader activities. Their copyright share is estimated using a derived factor equal to the ratio of Cat I–III value added to total GDP.	General retail and wholesale, transport, telecommunications, travel agencies

Source: WIPO Guide (2015 Revised Edition), Chapter 3.

3.3 Mapping NACE Codes to WIPO Categories: The Albanian Adaptation

The WIPO Guide's Annex IV provides a definitive mapping of economic activities to the four copyright categories at the NACE Rev.2 four-digit level. This mapping identifies approximately 150 individual NACE codes across all four categories, many of which carry special markers: "(s)" for codes shared across multiple copyright sub-sectors and "(m)" for codes with a mixed copyright/non-copyright nature.

However, the statistical data provided by the Albanian Institute of Statistics (INSTAT) through Structural Business Statistics (SBS) are available only at the NACE two-digit level, and in many cases only as aggregates of several two-digit divisions (e.g., NACE 16–18, 58–60, 62–63, 69–71, 90–93). This creates a fundamental methodological challenge: the team had to correctly map each INSTAT aggregate to the appropriate WIPO category, accounting for the fact that a single two-digit NACE division may span multiple WIPO categories, and that INSTAT aggregates often bundle copyright sectors with non-copyright sectors.

The mapping exercise involved three distinct steps:

Step 1 – Reconciliation. Every four-digit NACE code listed in WIPO Guide Annex was mapped upward to its parent two-digit division. Where all sub-codes within a division belonged to the same WIPO category, the mapping was straightforward (e.g., NACE 58 → Category I Core). Where

sub-codes were split across categories (e.g., NACE 32: musical instruments in Cat II, jewellery and toys in Cat III), the division was flagged for special treatment.

Step 2 – Aggregate decomposition.

Where INSTAT provides data only as multi-division aggregates, the team used Supply and Use Table (SUT) weights to decompose the aggregate into individual NACE divisions. For example, the NACE 72–75 aggregate (Scientific R&D, Advertising, Design, Veterinary) was split using SUT-derived shares: NACE 73 (Advertising) = 48.40%, NACE 74+75 (Design/Veterinary) = 43.93%, and NACE 72 (R&D) = 7.67%. These allocation weights were validated against employment data to confirm their plausibility.

Step 3 – Category assignment and exclusion.

Each two-digit NACE division was assigned to the correct WIPO category based on Annex IV, with the appropriate Copyright Attribution Coefficient (CAC). Critically, divisions that are not listed anywhere in the WIPO Guide were excluded entirely (even where prior study versions had included them). Seven NACE divisions were removed for this reason (NACE 22, 69, 70, 72, 75, 92, 93).

Table 3.2 presents the final mapping of 23 NACE two-digit divisions (and one four-digit sub-code) to the four WIPO categories, together with the CAC applied, the data method used to isolate each sector from INSTAT aggregates, and the raw enterprise and employment figures from INSTAT SBS (2023) where available.

Table 3.2: NACE Rev.2 to WIPO Category Mapping, Albanian Adaptation, with Enterprises and Employment (2023)

NACE	Description	Cat.	CAC	Method	Ent.	Emp.	Notes
58	Publishing activities	I	1.00	Direct	418	1,522	<i>Book, journal, newspaper publishing</i>
59	Motion picture, video, TV, sound	I	1.00	Direct	303	1,266	<i>Film, TV, music production</i>
60	Programming and broadcasting	I	1.00	Direct	96	2,101	<i>Radio and television</i>
62	Computer programming, consultancy	I	1.00	Direct	2,500+	11,705	<i>Largest Core sub-sector by GVA</i>
63	Information service activities	I	1.00	Direct	—	—	<i>Part of 62–63 aggregate in SBS</i>
73	Advertising and market research	I	1.00	SUT alloc.	643	3,169	<i>48.40% of NACE 72–75 aggregate</i>
74	Design, photography, translation	I	0.70	SUT alloc.	1,239	2,068	<i>43.93% of 72–75; CAC 0.70 (Core; discounted for 74.90)</i>
90	Creative, arts and entertainment	I	1.00	Split 90–93	479	1,761	<i>Performing arts, artistic creation</i>
91	Libraries, archives, museums	I	1.00	Split 90–93	42	668	<i>91.01 only; 91.02/03 → Cat III</i>
18	Printing and reproduction	I	1.00	SUT alloc.	—	1,548	<i>Reclassified from Cat III in V12</i>
26	Electronics, computers, optical	II	0.25	Direct	14	242	<i>Mostly importers, not manufacturers</i>
17	Paper and paper products	II	0.25	SUT alloc.	—	3,207	<i>Reclassified from Cat III in V12</i>
32.20	Musical instruments	II	0.25	Est.	—	—	<i>Small; extracted from 31–33 aggregate</i>
13–15	Textiles, apparel, footwear	III	0.05	Direct	—	4,755	<i>Fashion and textile design component</i>
31	Furniture	III	0.05	Split 31–33	—	—	<i>Part of 31–33 aggregate</i>
71	Architecture and engineering	III	0.10	Isolated	1,844	7,595	<i>Isolated from 69–71; 69/70 excluded</i>
23	Non-metallic mineral products	III	0.02	Isolated	—	—	<i>Glass (23.1) only; NACE 22 excluded</i>
16	Wood products	III	0.02	SUT alloc.	—	—	<i>Sub-code 16.29 only; minimal CAC</i>
46	Wholesale trade	IV	ND	Direct	—	—	<i>ND factor = 0.041</i>
47	Retail trade	IV	ND	Direct	—	—	<i>ND factor = 0.041</i>
49–53	Transportation and storage	IV	ND	Direct	—	—	<i>ND factor = 0.041</i>
61	Telecommunications	IV	ND	Direct	—	3,888	<i>Largest Cat IV sub-sector</i>
79	Travel agency, tour operators	IV	ND	Direct	—	—	<i>Added in V12 per Annex IV</i>

Note: CAC = Copyright Attribution Coefficient. Ent. = number of enterprises. Emp. = people employed (raw, pre-attribution). "Direct" = INSTAT provides this sector directly. "SUT alloc." = isolated using Supply and Use Table weights. "Split" = extracted from INSTAT aggregate containing non-copyright sectors. "Isolated" = non-copyright divisions removed. "ND" = Non-dedicated factor (0.041). "—" = not separately published by INSTAT. Source: WIPO Guide Annex IV; INSTAT SBS (2023); IDRA calculations.

Data Note on NACE 79: INSTAT Structural Business Survey data for this code could not be disaggregated from the broader NACE aggregate at the 2-digit level available for this study. The GVA and employment contribution of NACE 79 is therefore recorded as zero in all years (2020–2024). This omission is assessed as immaterial to the headline CBI/GDP ratio, but it is flagged as a known data gap for resolution in future iterations when 4-digit NACE data becomes available.

3.3.1 Implications for Data Traceability

NACE 74 (Other professional activities) includes photography (74.20), graphic design (74.10), and translation (74.30), all legitimately Core per WIPO Guide Annex IV. However, NACE 74 at the 2-digit level also captures 74.90 (other professional, scientific and technical activities n.e.c.), which covers management consulting, environmental consulting, and other non-copyright professional services not listed in Annex IV. Because Albanian data are available only at the 2-digit NACE level, the full division is retained in Category I (Core Copyright Industries) but with a reduced CAC of 0.70, a compromise that recognises the predominance of copyright-dependent activities (74.10, 74.20, 74.30) while discounting for the non-copyright content captured in 74.90. This is more conservative than the CAC 1.00 applied to NACE 62 (Computer programming), where the mixed-content issue is narrower.

NACE 62 (Computer programming) is marked “(m)” in Annex IV, meaning mixed copyright/non-copyright content. However, standard WIPO practice in national studies (including the Netherlands 2022) treats the entire division as Core at CAC 1.00, which is the approach adopted here. The mixed nature of computer services is addressed separately in the foreign trade analysis (Chapter 6), where a 0.50 attribution factor is applied to BPM6 category BJ200.

SUT allocation weights are used to decompose three INSTAT aggregates (NACE 16–18, 72–75, and 90–93). These weights are derived from the 2019 Supply and Use Tables and validated against 2020–2023 employment data. They are held constant across the study period, a small

approximation considered acceptable given the absence of annual SUT updates.

The full NACE-to-WIPO mapping workbook, including the complete reconciliation at four-digit level, is provided as a separate annex to this study for peer review and replication purposes.

3.4 Core Copyright Industries (Category I) in Albania

Category I industries are the heart of the copyright economy. The Albanian Core comprises ten NACE divisions covering publishing, audiovisual production, software, advertising, creative arts, libraries, printing, and Works of applied arts, as industrial designs are not covered by ACL art. 8(f) and Art 39.

As shown in Table 3.2, these sectors collectively employ over 25,800 people across more than 5,700 enterprises (2023, raw pre-attribution figures). The following sub-sections describe each Core sub-sector in the Albanian context.

3.4.1 Publishing and Press

Includes book publishing (NACE 58.11), journal and periodical publishing (58.14), newspaper publishing (58.13), and news agency activities (63.91). Albania has a relatively active print media sector despite rapid digitalisation, with 1,522 people employed in NACE 58 across 418 enterprises as of 2023 (INSTAT SBS). The sector faces significant structural challenges: print circulation has declined as digital consumption grows, advertising revenue has shifted to online platforms, and the Albanian-language book market remains small in absolute terms. Copyright enforcement in publishing is weak. Despite these challenges, the sector remains the

traditional backbone of copyright-based cultural production and is the primary generator of locally authored literary and journalistic works.

3.4.2 Music and Sound Recording

Includes sound recording and music publishing (NACE 59.20). The Albanian music market is characterised by a high volume of digital consumption and a growing streaming economy. The primary CMOs for music are ALBAUTOR (authors' rights), A.K.D.I.E. (performers' rights), and Faber Collective (phonogram producers' rights). Albanian music has a significant diaspora audience, amplifying digital streaming revenues through platforms such as YouTube, Spotify, and Apple Music. Several Albanian artists regularly achieve millions of views, making music one of the most globally visible Albanian cultural exports. However, the formal music industry remains small in employment terms, with most activity concentrated in Tirana-based recording studios and production companies.

3.4.3 Film, Television, and Audiovisual Production

Includes motion picture production (NACE 59.11), post-production (59.12), distribution (59.13), cinema projection (59.14), radio broadcasting (60.10), and TV programming and broadcasting (60.20). Albania's audiovisual sector has expanded significantly with the liberalisation of media and the growth of private broadcasting. The sector includes major private broadcasters (Top Channel, Klan TV, Vizion Plus), the public broadcaster RTSH, and a growing number of independent production companies. INSTAT SBS data for 2023 show 1,266 people employed in NACE 59 across 303 enterprises, and 2,101

people in NACE 60 across 96 enterprises. The Albanian National Centre for Cinematography (QKSH) administers a state film fund that supports local production. Albania has participated in EU Creative Europe since 2015, enabling co-production partnerships with European partners. The sector's copyright dimension is substantial: audiovisual works generate both domestic broadcasting royalties (through SUADA) and international licensing revenues.

3.4.4 Software and Digital Content

Includes computer programming and consultancy (NACE 62.01, 62.02, 62.09), software publishing (58.29), data processing and hosting (63.11), and web portals (63.12). The software sector is by far the largest and fastest-growing copyright industry in Albania, both in employment and value added. INSTAT SBS data for 2023 show 11,705 people employed in NACE 62 alone, up from approximately 5,938 in 2020, a near doubling in three years. The sector comprises over 2,500 registered enterprises, ranging from individual freelancers and small studios to large outsourcing operations serving international clients.

Software exports (BPM6 code BJ200) reached EUR 206.1 million in 2024, making this sub-sector the dominant driver of Albania's copyright services trade surplus. Software code is protected under the Albanian Copyright Law (ACL No. 35/2016 (as amended), Art. 8 (a); 88-94, and software licensing, SaaS contracts, and open-source contributions all involve copyright transactions. The rapid growth of this sector accounts for approximately 34.9% of all Core Copyright Industry GVA in 2023, a structural feature that

distinguishes Albania from its Western Balkan peers where publishing typically dominates.

3.4.5 Visual Arts, Photography, and Advertising Content

Includes advertising agencies and creative content production (NACE 73.11, 73.20), photographic activities (74.20), and specialised design activities (74.10). The primary output of advertising agencies; creative copy, audiovisual commercials, graphic design, and digital content, is copyright-protected. INSTAT SBS data for 2023 show 3,169 people employed in NACE 73 across 643 enterprises, making advertising one of the larger Core sub-sectors by employment. Photography (NACE 74.20) and specialised design (74.10) together employ approximately 2,068 people in 1,239 enterprises, including wedding and event photography studios, graphic design firms, and a growing freelance creative community.

3.4.6 Performing Arts and Cultural Institutions

Includes performing arts activities (NACE 90.01), support activities for performing arts (90.02), artistic creation (90.03), and operation of arts facilities (90.04). Under the V12 mapping, NACE 90 is classified as a standalone Core Copyright Industry with a CAC of 1.00, consistent with WIPO Guide Annex IV. NACE 91 is split: 91.01 (Library and archive activities) is Core at 1.00, while 91.02/03 (Museums and historical sites) is classified as Category III at 0.05. NACE 92 (Gambling) and NACE 93 (Sports) are excluded entirely as they are not listed in Annex IV.

INSTAT SBS data for 2023 show 1,761 people employed in NACE 90 across 479 enterprises, and 668 people in NACE 91

across 42 enterprises. The sector is anchored by state cultural institutions: the National Theatre of Albania, the National Opera and Ballet, the Albanian Philharmonic, the National Historical Museum, and the network of municipal theatres and cultural centres. An independent performing arts scene has grown in recent years, with festivals such as TIFF, Butrinti Festival, and contemporary dance and theatre initiatives. The copyright dimension relates primarily to the rights of performers, choreographers, and theatrical authors, managed collectively through ALBAUTOR and A.K.D.I.E.

3.5 Interdependent Copyright Industries (Category II) in Albania

Category II industries supply the hardware, equipment, and materials through which copyright content is created and consumed. The WIPO Guide classifies them as “interdependent” because their products are necessary for the production, distribution, or enjoyment of copyright materials; computers, televisions, cameras, musical instruments, and paper for printing.

Under the V12 mapping, Category II in the Albanian context comprises three sub-sectors: NACE 26 (Manufacture of computer, electronic, and optical products), NACE 17 (Manufacture of paper and paper products), and NACE 32.20 (Manufacture of musical instruments). NACE 27–30 (electrical equipment, machinery, motor vehicles) are excluded, as Annex IV does not list general electrical equipment or vehicles as copyright-interdependent industries.

Albania's Category II consists almost entirely of importers and retailers rather than domestic manufacturers, reflecting

the country's limited manufacturing base. INSTAT SBS data for 2023 show 14 enterprises and 242 employees in NACE 26, and 3,207 employees in NACE 17 (paper). NACE 32.20 (musical instruments) is a very small sub-sector. A copyright attribution coefficient of 0.25 is applied to all three sub-sectors. The WIPO Guide (2015) does not specify a single numerical range for Category II coefficients; it states instead that "the value assigned to them would be based on the judgment of the research team undertaking the analysis and the experience of past studies" (paras. 143–148, p. 59–60). The 0.25 value applied here is consistent with the value used in the Kosovo (2019) WIPO study for an economy with comparable manufacturing structure; comparator studies more broadly (e.g., Netherlands 2025, Appendix B.1, which compiles factors from seven national studies) confirm wide cross-country variation in attribution factors, supporting selection at the conservative end of the empirical range for Albania given its limited domestic manufacturing of copyright-related equipment.

It is worth noting that, although Category II represents a small share of the headline GDP figure (0.13% in 2024), it has shown the strongest relative growth of all four WIPO categories over the study period, rising from 0.08% to 0.13% of GDP between 2020 and 2024, a relative increase of approximately 63%. This growth reflects three converging drivers in Albania: (i) sustained growth in imports of consumer electronics, storage media, and computer equipment that enable the consumption and reproduction of copyrighted content; (ii) the formalisation of distribution channels (HS-coded customs declarations replacing informal channels); and (iii) growth in domestic demand for digital

media. While modest in absolute size, Category II is a useful complementary indicator: rising consumption of copyright-enabling equipment is a leading signal of broader copyright economy expansion, and an explicit input into the private copying levy framework analysed in Chapter 6, Section 6.8.

3.6 Partial Copyright Industries (Category III) in Albania

Category III industries embed copyright creativity as a component rather than the whole of their activity. The copyright element arises because part of their output involves creative design or original authorship. For example, an architectural plan is a copyright work, but the construction it enables is not.

Under the V12 mapping, Category III comprises: NACE 13–15 (textiles, wearing apparel, and footwear – CAC 0.05), NACE 71 (architecture and engineering – CAC 0.10), and NACE 16, 23, 31, 32 (excl. 32.20), 91.02/03 (wood products, glass, furniture, other manufacturing, museums – CAC 0.02–0.05).

The largest sub-sector by employment is NACE 71 (architecture and engineering), with 7,595 employees in 1,844 enterprises as of 2023. NACE 13–15 (textiles, apparel, footwear) is the second largest with approximately 4,755 people. The V12 unbundling of the former NACE 16–18 aggregate into separate categories reflects the sharply different copyright intensities revealed by Input-Output analysis: NACE 18 (printing) is directly copyright-linked and reclassified to Core; NACE 17 (paper) supplies printing and publishing and is reclassified to Interdependent; NACE 16 (wood) has virtually no copyright linkage and retains a minimal CAC of 0.02.

3.7 Non-Dedicated Support Industries (Category IV) in Albania

Category IV industries support the distribution and sale of copyright goods as part of broader commercial activities. The WIPO Guide places general wholesale and retail trade, transportation, and telecommunications infrastructure in this category. In the Albanian context, the most significant non-dedicated sub-sector is NACE 61 (Telecommunications), employing approximately 3,888 people and generating substantial GVA, though its role in relation to copyright is that of distribution infrastructure.

The attribution methodology for Category IV differs fundamentally from Categories I–III. Rather than applying a fixed coefficient from the WIPO Guide’s recommended ranges, this study uses a WIPO-derived non-dedicated factor (f), calculated as the ratio of attributed GVA of Categories I–III to non-distribution GDP (i.e., total GDP minus raw Category IV GVA). This produces a factor reflecting the actual relative weight of copyright industries in the Albanian economy. The resulting non-dedicated contribution of approximately 0.63% of GDP is broadly in line with Kosovo (0.58%) and Serbia (0.71%). The methodological implications are discussed in the sensitivity analysis (Section 5.4) and documented in the ND_FACTOR sheet of the Chapter 5 calculation workbook.

3.8 Attribution Coefficients: Validation and Summary

For industries in Categories II, III, and IV, where copyright activity represents only a fraction of total economic activity, a copyright attribution coefficient (CAC) must be applied. The WIPO Guide provides recommended coefficient ranges for each sector based on international evidence. This study applies a rigorous three-tier validation approach:

WIPO standard coefficients are used as the baseline for all sectors.

Desk validation using INSTAT Structural Business Survey sub-sector data (employment, enterprise counts, and size distribution for 2020–2023), cross-referenced with three comparator WIPO studies (Kosovo 2019, Serbia 2012, Netherlands 2022), is applied to verify or adjust each coefficient.

Documentation: all attribution decisions are recorded with the specific evidence base, confidence level, and sensitivity impact on the headline GDP figure.

Table 3.3 presents the complete set of CACs applied in this study, together with the decision status and evidence base for each.

Table 3.3: Summary of Copyright Attribution Coefficients Applied

NACE	Sector	Category	CAC	Evidence / Rationale
58–60	Publishing, Audiovisual, Broadcasting	I – Core	1.00	Direct WIPO listing; all sub-codes Core
62–63	Software, IT, Information Services	I – Core	1.00	Standard practice (NL 2023, KS 2019)
73	Advertising and Market Research	I – Core	1.00	73.11/73.20 listed in Annex IV as Core
74	Works of applied arts, Photography, Translation	I – Core	0.70	Mixed (m/s); 0.70 compromise for 74.10
90	Creative Arts and Entertainment	I – Core	1.00	Separated from 90–93; full Core sector
91.01	Libraries and Archives	I – Core	1.00	Split from 91; libraries are Core
18	Printing and Reproduction	I – Core	1.00	Moved from Cat III to Cat I per Annex IV
26	Electronics, Computers, Optical	II – Interdep.	0.25	Midpoint of WIPO range (0.20–0.50)
17	Paper and Paper Products	II – Interdep.	0.25	Moved from Cat III to Cat II per Annex IV
32.20	Musical Instruments	II – Interdep.	0.25	Split from 31–32; instruments = Cat II
13–15	Textiles, Apparel, Footwear	III – Partial	0.05	WIPO standard; validated via I-O analysis
71	Architecture and Engineering	III – Partial	0.10	Isolated from 69–71; 69/70 excluded
31	Furniture	III – Partial	0.05	Validated via INSTAT SBS cross-check
16, 23	Wood, Glass	III – Partial	0.02	Minimal CAC for marginal sub-codes
91.02/03	Museums and Historical Sites	III – Partial	0.05	Split from 90–93; museums = Partial
46–47	Wholesale and Retail Trade	IV – Non-ded.	Derived	Standard WIPO ND factor methodology
49–53	Transportation and Storage	IV – Non-ded.	Derived	Standard WIPO ND factor methodology
61	Telecommunications	IV – Non-ded.	Derived	Standard WIPO ND factor methodology
79	Travel Agency and Tour Operators	IV – Non-ded.	Derived	New addition per Annex IV Division 79

Note: “Derived” = WIPO-derived non-dedicated factor. Source: WIPO Guide 2015; INSTAT SBS; IDRA calculations.

3.9 Key Analytical Dimensions

For each of the four industry groups, the study measures the following economic dimensions:

- **Gross Value Added (GVA) and share of GDP** – using national accounts and NACE-based sectoral data from INSTAT (Chapter 4).
- **Employment** – total people employed, by gender, by type (formal/informal), and by firm size (Chapter 5).
- **Foreign trade** – exports and imports of copyright goods and services using BPM6/BoP methodology and customs data (Chapter 6).
- **Multiplier effects** – input-output linkages with the rest of the economy (Chapter 6).

3.10 Gender and Inclusion Analytical Lens

In addition to the standard WIPO dimensions, this study applies a gender and inclusion lens throughout. This means: (i) all employment data are sought in sex-disaggregated form; (ii) value chain mapping incorporates gender roles at each

node; (iii) barriers to participation by women, youth, and marginalized groups are identified through qualitative analysis; and (iv) policy recommendations include targeted inclusion measures.

The analytical framework is informed by the ILO's Guidelines on Measuring Decent Work (2013), UNESCO's Gender Equality in the Creative Sector framework, and the European Commission's Gender Equality Strategy 2020–2025 as applied to cultural and creative sectors. Where sex-disaggregated data are not yet available, the study flags these gaps explicitly and provides recommendations for future data collection.

"The gender and inclusion lens described above is applied in full in Chapter 7, which presents all available quantitative evidence on women's participation in copyright industries (Section 7.1), the structural barriers identified through stakeholder consultations (Section 7.2), and gender-targeted policy recommendations (Section 9.3). Readers looking for the empirical findings should refer directly to Chapter 7; the present section defines only the analytical framework underpinning that chapter."

Chapter 4: Data Architecture and Methodology



4.1 Data Sources Overview

The study combines secondary administrative and statistical data with primary research. The table below summarizes the principal data sources, their coverage, and their role in the analysis.

Source	Data Type	Coverage	Use in Study
INSTAT (National Statistics Institute)	National accounts, structural business survey, employment (LFS), census	National; annual	GVA by sector, employment, firm counts, wage data
Bank of Albania (BoA)	Balance of payments, trade in services, FDI	National; quarterly/annual	Exports/imports of copyright services; royalties flows
Customs Authority (General Directorate of Customs)	Trade in copyright goods (HS codes)	National; annual	Exports/imports of copyright goods
Collective Management Organizations (CMOs)	Licensing revenue, repertoire size, distribution data	Sector-specific; variable	Royalty flows; sector coverage; validation
Ministry of Tourism, Culture and Sports/ Copyright Directorate	Copyright registrations, enforcement data, policy documents	National; annual	Qualitative context; regulatory analysis
Eurostat / UN Comtrade	Comparative trade and national accounts data	International; annual	Comparative benchmarking; Kosovo, Serbia, EU
WIPO Reference Studies	Kosovo, Serbia, Netherlands, Croatia, Bulgaria, Romania, Singapore copyright industry studies	Country-specific	Methodology reference; benchmarking

4.2 Estimating GVA and GDP Contribution

The primary method for estimating value added is supply-use based. Where direct sector-level GVA data are available from INSTAT national accounts at the required NACE code level, these are used directly. Where sectoral granularity is insufficient (e.g., NACE codes are aggregated), the following estimation approaches were applied in order of preference:

1. Structural Business Survey (SBS) – turnover, employment, and wage data by NACE code, used to estimate value added via cost-structure methods
2. Labour cost/wage bill method – where employment data are available but value added is not, value added is

estimated as a multiple of the wage bill using sector-specific ratios

3. Input-output table disaggregation – where I-O tables are available, to allocate value added across more detailed activity categories

4.3 Employment Measurement

Employment is measured as: (i) total people employed (headcount); (ii) full-time equivalent (FTE) employment; and (iii) proportion of total national employment. Data sources are the INSTAT Labour Force Survey (LFS) and Structural Business Survey. Where possible, employment data are disaggregated by: sex, age group (15–24 youth; 25–54 prime age; 55+), employment status (employee vs. self-employed), and enterprise size class.

4.4 Trade in Copyright Goods and Services

Trade measurement follows two streams:

- (i) **goods** – using HS code-level customs data, applying the WIPO list of copyright goods (as defined in the 2015 Guide) mapped to HS 2017 nomenclature; and
- (ii) **services** – using Bank of Albania balance of payments data, drawing on BPM6 categories for charges for the use of intellectual property, audiovisual and related services, and computer services.

4.5 Input-Output Analysis

The study also examines how strongly the copyright industries are connected to the rest of the Albanian economy, drawing on INSTAT's official 2023 Supply-Use Tables which is the standard national-accounts matrix that records how each sector's output is used as an input by every other sector. From these tables the study estimates output multipliers for the copyright-related sectors: a measure of how much additional output is generated across the whole economy for each unit of final demand in a copyright sector, once its suppliers and their suppliers are taken into account. The calculation follows the standard Leontief input-output method.

Two limitations should be kept in mind when reading these results. First, the multipliers capture supply-chain (direct and indirect) effects only; they are Type I multipliers and do not include the induced effects that arise when the resulting wages are spent by households. Second, a small number of copyright activities appear only as combined sectors in the 64-sector table (for example, IT together with information

services, and film together with broadcasting), so the estimates are measured at that level of aggregation rather than for each narrow activity. The headline results are summarised in Chapter 5 (Section 5.5), and the full technical derivation and sector-by-sector figures are provided in Annex A.

4.6 Data Limitations and Mitigations

The following data limitations affect the study and have been addressed through the mitigations described below. Full documentation is provided in Annex A.4.

4-digit NACE GVA disaggregation gap. INSTAT national accounts publish GVA at the 2-digit NACE level (e.g., NACE 58–60 as a single aggregate, NACE 90–93 as a single aggregate). This prevents direct measurement of individual sub-sectors such as NACE 59.20 (music) or NACE 90 (performing arts) separately from NACE 92 (gambling). Workaround: employment shares from the Structural Business Survey are used to allocate aggregate GVA to sub-sectors where needed. For NACE 73 (advertising), the 2023 Supply-Use Tables provided direct sub-sector GVA, which was applied retroactively using the SUT-based 48.4% share. Materiality: medium for sub-sector analysis, low for aggregate CBI/GDP headline. This workaround is documented in the GVA_CALC sheet of the Chapter 5 workbook.

Absence of an Albanian enterprise copyright survey. No enterprise-level survey of copyright activity exists in Albania, meaning Copyright Attribution Coefficients (CACs) are applied using the WIPO Guide (2015) recommended ranges as a baseline, validated through a three-tier process: (i) WIPO baseline coefficients, (ii) desk validation using INSTAT SBS data and

three comparator studies, and (iii) Input-Output analysis for selected sectors. For Category IV (Non-dedicated), a WIPO-derived factor ($f = \text{Attributed GVA of Categories I-III} / \text{Non-distribution GDP}$) replaces the traditional flat 0.02. Full documentation is in respective section and Annex A. This limitation has medium materiality. Recommendation: commission an INSTAT enterprise survey for the next study cycle.

NACE 90–93 aggregation. INSTAT GVA data for the arts, entertainment, and recreation sector aggregate NACE 90 (creative/performing arts), 91 (libraries, archives, museums), 92 (gambling), and 93 (sports) without disaggregation. Our methodology allocates this aggregate using SUT-based employment weights: NACE 90 is classified as standalone Core (CAC 1.00), NACE 91.01 (Libraries) as Core, NACE 91.02/03 (Museums) as Cat III (0.15), and NACE 92–93 are excluded entirely. Materiality: low–medium. Mitigation: 4–digit NACE GVA data has been requested from INSTAT for future revisions.

Preliminary 2024 balance of payments data. Bank of Albania BoP data for 2024 is preliminary and subject to revision. This is flagged throughout Chapter 6. Minor revisions are expected but will not materially change the structural conclusions regarding the software export surplus or the IP royalty deficit.

Gender-disaggregated employment data. The INSTAT LFS publishes employment by sex at the 1-digit NACE section level but not at the 2- or 4-digit level needed for this study Pending data receipt, Materiality: high for Chapter 7, nil for Chapters 5–6 headline figures.

Workbook methodology cross-reference. All quantitative calculations are

documented in three companion Excel workbooks: The workbooks are designed to be fully auditable: every calculated cell traces back to a raw data input and an attributed coefficient. The ND_FACTOR sheet in the Ch5 workbook documents the algebraic derivation of the non-dedicated factor, including its endogenous relationship to the headline CBI/GDP share (see Section 5.4).

Comparator study base year differences. International benchmarking in Chapter 8 draws on studies with different reference years (Kosovo 2019, Serbia 2012, Netherlands 2022, Albania 2024). All comparisons are clearly labelled with their base year. Materiality: low.

SBS employment coverage variability. INSTAT Structural Business Survey employment data has variable sector coverage, with some NACE codes potentially underreported. The Labour Force Survey (LFS) national employment total is used as the more reliable denominator for employment share calculations. SBS data is used only for within-sector distribution analysis. Materiality: low.

The WIPO-derived non-dedicated factor is computed annually as $f = \text{Attributed GVA (Categories I + II + III)} / \text{Non-distribution GDP}$, where Non-distribution GDP equals total GDP minus the raw GVA of all Category IV sectors. This yields factors of 3.80% (2020), 3.94% (2021), 4.42% (2022), 4.54% (2023), and 4.31% (2024), substantially higher than the traditional flat 0.02 (2%) used in many earlier WIPO studies. The rationale follows WIPO Guide (2015), Section 5.9: the non-dedicated sector's copyright contribution should mirror the economy's overall copyright intensity rather than an arbitrary fixed rate. The sensitivity analysis in Section 5.4

quantifies the impact of this choice: the WIPO-derived factor adds approximately 0.20–0.34 percentage points to the headline

CBI/GDP figure compared with the flat 0.02 alternative.

Chapter 5: Macroeconomic Contribution - GDP, GVA, and Employment



This chapter presents the headline quantitative findings on the economic weight of copyright and related rights-based industries in the Albanian economy, in accordance with the WIPO Methodology for Estimating the Economic Contribution of the Copyright Industries. All estimates

draw on INSTAT national accounts data (Production, Intermediate Consumption and GVA by sector, 2020–2024) and the INSTAT Structural Business Survey (employment by NACE sector, 2020–2023). WIPO attribution coefficients have been applied to industries in Categories III and IV.

KEY FINDINGS – CHAPTER 5

- All copyright industries: 4.31% of GDP in 2024 = ALL 108.6 billion (EUR ~1,048 million)
- Core copyright industries alone: 3.34% of GDP in 2024, up from 2.98% in 2020
- Total copyright employment: 40,535 people in 2023 (3.38% of national workforce; latest LFS data available)
- Fastest-growing sub-sector: IT & Software (NACE 62–63), GVA +102%, employment +97% (2020–2023)
- Software now represents approximately 34.9% of all Core Copyright industry GVA (2023)
- Real-terms growth (after deflating for inflation): +39.3% over 2020–2024, about 8.6% real CAGR (vs +72.4% nominal)
- Growth was overwhelmingly employment-led: real GVA-per-worker rose only +2.4% across CBI 2020–2023; IT productivity actually declined –6.0% in real terms

5.1 Contribution to GDP (Gross Value Added)

Table 5.1 presents estimated GVA by WIPO category for 2020–2024. Total copyright industry GVA grew from ALL 63.0 billion in

2020 to ALL 108.6 billion in 2024, an increase of 72.4% in nominal terms. In 2024, the latest year of the series, all copyright industries contributed ALL 108.6 billion, equivalent to approximately EUR 1,048 million.

Table 5.1: GVA of Copyright Industries by WIPO Category, Albania 2020–2024 (ALL millions, current prices)

WIPO Category	2020	2021	2022	2023	2024	Attribution Coeff.
I. Core Copyright Industries	49,337	57,935	72,427	82,533	84,032	1.00
Publishing, Audiovisual & Broadcasting (58–60)	9,222	10,379	11,233	11,438	11,779	1.00
IT Services & Software (62–63)	13,971	18,541	24,990	28,773	28,203	1.00
Arts, Entertainment & Culture (90–93, attr.)	10,006	12,679	15,573	18,925	20,542	1.00
Advertising, Works of applied arts & Photography (73, 74)	16,421	16,622	20,992	23,806	23,918	1.00/0.70
II. Interdependent Copyright Industries	1,292	1,646	2,250	3,253	3,200	0.25

Electronics & Computing Equipment (26-30, attr.)	1,292	1,646	2,250	3,253	3,200	0.25
III. Partial Copyright Industries	4,218	4,420	5,738	5,874	5,572	0.05–0.10
Architecture & Engineering (NACE 71, attr.)	1,849	1,866	2,496	2,644	2,727	0.10
Textiles, Apparel & Footwear (NACE 13-15, attr.)	1,724	1,800	2,265	2,296	1,964	0.05
Furniture, Mfg, Glass, Wood & Museums (31, 32, 23, 16, 91)	645	754	978	934	882	0.02–0.05
IV. Non-Dedicated Support Industries	8,141	9,568	14,578	15,741	15,786	WIPO-derived
TOTAL – All Copyright Industries	62,989	73,570	94,994	107,401	108,590	
Equiv. EUR millions (year-specific BoA avg rates)	EUR 509m	EUR 601m	EUR 800m	EUR 993m	EUR 1,048m	
ALL copyright industries as % of GDP	3.80%	3.94%	4.42%	4.54%	4.31%	
Core industries (Cat. I) as % of GDP	2.98%	3.11%	3.37%	3.49%	3.34%	

Note: GDP: INSTAT Annual National Accounts (production approach, current prices). Mapping per WIPO Guide 2015, Annex IV. NACE 74 (Design/Photography) classified as Core at CAC 0.70 (discounted from 1.00 to account for non-copyright activities captured in 74.90 at 2-digit level; see Section 3.3.1). WIPO-derived ND factor ($f = \text{Cat I+II+III attributed GVA} / \text{Non-distribution GDP}$). EUR converted at year-specific Bank of Albania average rates. Source: INSTAT Llogaritë Kombëtare Vjetore; INSTAT SBS; IDRA calculations.

5.1.1 Trend Analysis - Five-Year Growth, 2020–2024

The most significant structural development in Albania's copyright economy over 2020–2024 is the rapid expansion of the IT and software sector (NACE 62–63). GVA in this sector more than doubled, from ALL 13,971 million in 2020 to ALL 28,203 million in 2024 (+102%), driven by strong domestic demand and growing export orientation to EU markets. By 2023, IT and software had become the single largest contributor within Albania's

core copyright industries, accounting for 34.9% of all Category I GVA.

The creative arts, libraries and printing sub-sector (NACE 90, 91.01, 18) demonstrated particularly strong recovery and growth post-COVID, with attributed GVA expanding 105% from ALL 10,006 million (2020) to ALL 20,542 million (2024). Publishing, audiovisual and broadcasting (NACE 58–60) showed steady but more modest growth (+27.7%), reflecting the structural transition from print to digital in publishing and relative stability in traditional broadcasting.

Table 5.2: GVA Growth by Sub-Sector, 2020–2024 (ALL millions, nominal)

Sub-Sector (NACE)	2020	2021	2022	2023	2024	Chg 20-24
Publishing, Audiovisual & Broadcasting (58–60)	9,222	10,379	11,233	11,438	11,779	+27.7%
IT Services & Software (62–63)	13,971	18,541	24,990	28,773	28,203	+101.9%
Creative Arts, Libraries & Printing (90, 91.01, 18)	10,006	12,679	15,573	18,925	20,542	+105.3%
Advertising, Design & Photography (73, 74)	16,421	16,622	20,992	23,806	23,918	+45.7%
Telecommunications (61, Cat IV)	517	521	632	733	673	+30.2%
Architecture & Engineering (71)	2,773	2,799	3,744	3,966	4,090	+47.5%
Electronics, Paper & Instruments (26, 17, 32.20)	1,292	1,646	2,250	3,253	3,200	+147.7%
Textiles, Apparel & Footwear (13–15)	1,724	1,800	2,265	2,296	1,964	+13.9%

Note: All values in millions ALL, current prices. Growth = nominal change 2020 to 2024. Source: INSTAT; IDRA calculations.

5.1.2 Share of GDP by Category

Total copyright industries' share of GDP rose from 3.80% in 2020 to a peak of 4.54% in 2023, before a marginal moderation to 4.31% in 2024. The slight decline in 2024

reflects a plateauing of IT/software GVA (ALL 28,203m vs ALL 28,773m in 2023), consistent with post-pandemic tech sector normalization, while overall GDP continued to expand. The trajectory remains positive over the five-year period.

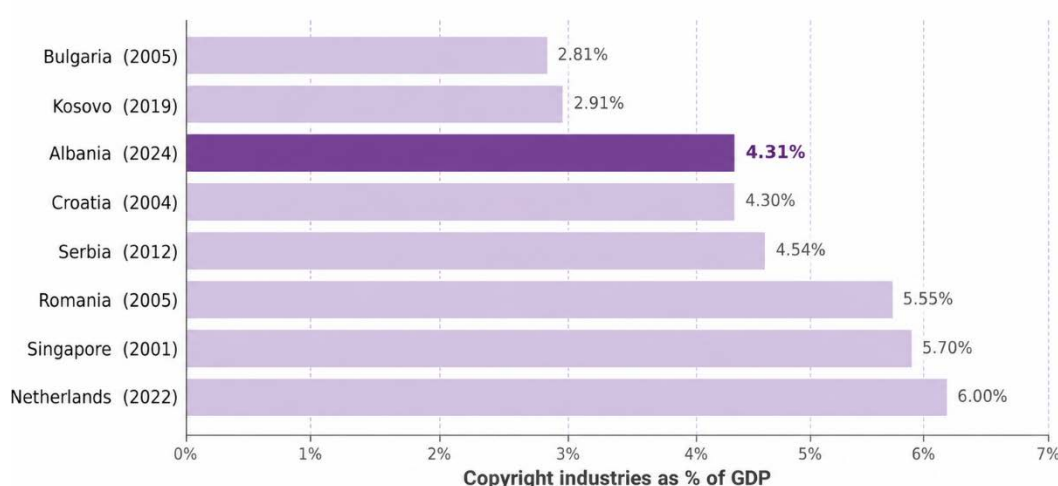
Table 5.3: Copyright Industries as % of GDP by WIPO Category, Albania 2020–2024

WIPO Category	2020	2021	2022	2023	2024	Trend
I. Core Copyright Industries	2.98%	3.11%	3.37%	3.49%	3.34%	↑
II. Interdependent Industries	0.08%	0.09%	0.10%	0.14%	0.13%	↑
III. Partial Copyright Industries	0.31%	0.29%	0.33%	0.30%	0.28%	↑
IV. Non-Dedicated Support Industries	0.50%	0.52%	0.69%	0.68%	0.64%	↑
TOTAL	3.80%	3.94%	4.42%	4.54%	4.31%	↑

Note: GDP estimates approximate. Regional benchmarks for reference: Kosovo 2.35% of GDP (2019 study), Serbia 4.00% of GDP (2012 study), Netherlands 6.0% of GDP (2022 study). Albania at 4.31% (2024) is consistent with the Western Balkans peer group.

Albania in International Context

Copyright industries as % of GDP — comparator countries (study reference year in parentheses)



Sources: Kosovo EU IPR Study (2021); Serbia FREN/WIPO (2014); Netherlands SEO (2025); Croatia CBS/WIPO; Bulgaria NSI/WIPO; Romania MoPF/WIPO; Singapore DOS/WIPO; Albania IDRA/GIZ/WIPO (2026). Figures reflect each study's reference year and are not directly comparable across time.

Figure 5.1: Albania in International Context, Copyright Industries as % of GDP

Source: WIPO national copyright industry studies (see Chapter 8 for full references). Reference years differ across countries, see chart labels.

5.1.3 Real vs. Nominal Growth

The figures presented in Tables 5.1–5.3 are expressed in current (nominal) prices and therefore reflect both real expansion of the copyright sector and the effect of price changes. Albania experienced elevated inflation in 2022 and 2023, so a portion of the +72.4% nominal growth in copyright-industry GVA over 2020–2024 is attributable to price changes rather than expansion of real activity.

To separate price effects from real growth, nominal GVA has been deflated using the

implicit GDP deflator (computed from INSTAT national accounts at current and constant 2016 prices, rebased to 2020 = 100). The cumulative deflator effect over 2020–2024 is +23.7%; applied uniformly across copyright sub-sectors, this implies a real-terms expansion of approximately +39.3% over the four-year period, equivalent to a real CAGR of about 8.6% (versus 14.6% nominal). Real growth therefore remains substantial, but materially lower than the nominal headline.

Table 5.3a: Copyright Industries GVA – Nominal vs. Real Growth, 2020–2024 (ALL millions)

WIPO Category	2020	2021	2022	2023	2024	Nominal Δ	Real Δ
I. Core Copyright	49,337	57,935	72,427	82,533	84,032	+70.3%	+37.6%
II. Interdependent	1,292	1,646	2,250	3,253	3,200	+147.6%	+100.1%
III. Partial Copyright	4,218	4,420	5,738	5,874	5,572	+32.1%	+6.8%
IV. Non-dedicated Support	8,141	9,568	14,578	15,741	15,786	+93.9%	+56.7%
TOTAL – All CBI (nominal, ALL m)	62,989	73,570	94,994	107,401	108,590	+72.4%	–
TOTAL – All CBI (real, 2020 prices, ALL m)	62,989	71,154	83,652	88,915	87,759	–	+39.3%

Note: Real GVA = nominal GVA divided by the implicit GDP deflator (2020 = 100). Cumulative deflator 2020–2024 = 1.237; annual deflator changes (Y/Y): +3.4% (2021), +9.8% (2022), +6.4% (2023), +2.4% (2024). The deflator is applied uniformly across sub-sectors as INSTAT does not publish deflators at NACE 2-digit level; sector-specific deflators would refine this picture. Source: INSTAT Annual National Accounts; IDRA calculations (Ch5 V17 Workbook, REAL_GROWTH sheet).

Two observations follow from this decomposition. First, the structural conclusion of the study, that copyright industries make a material and growing contribution to the Albanian economy, holds firmly in real terms; a 39.3% real expansion over four years is large relative to overall real GDP growth of approximately 22.9% over the same period. Copyright industries have therefore expanded faster than the economy as a whole even after stripping out price effects. Second, the gap between the ~+72% nominal and +39.3% real growth figures reflects the unusually inflationary 2022–2023 period in Albania and is not specific to the copyright sector; the same

pattern affects most sectors of the economy and any cross-country comparison drawn from current-prices data.

5.2 Employment Contribution

Total employment in the copyright industry grew from approximately 29,398 people in 2020 to 40,535 in 2023, a 38% increase over three years. This outpaced the overall national labour market significantly (national employment grew ~4.5% in the same period), raising copyright industries' share of the workforce from 2.50% to 3.38%.

Table 5.4: Employment in Copyright Industries by WIPO Category, Albania 2020–2023 (annual average, people)

WIPO Category / Sub-Sector	2020	2021	2022	2023	Change 2020-23
I. Core Copyright Industries	20,262	24,542	28,361	29,734	+9,472 (+47%)
Publishing (NACE 58)	1,137	1,564	1,499	1,522	+385 (+34%)
Film, Audio & Music Production (59)	622	676	787	856	+234 (+38%)
Broadcasting – TV & Radio (60)	4,159	4,294	4,528	4,407	+248 (+6%)
Computer Programming & Software (62)	5,938	8,636	10,599	11,705	+5,767 (+97%)
IT & Information Services (63)	2,051	2,081	2,448	2,784	+733 (+36%)
Advertising & Market Research (73)	2,152	3,192	3,635	3,169	+1,017 (+47%)
Arts, Entertainment & Culture (90,91)	1,419	1,754	1,968	2,295	+876 (+62%)
II. Interdependent Industries	697	748	950	875	+178 (+26%)
III. Partial Copyright Industries	3,682	3,710	3,883	3,833	+151 (+4%)
IV. Non-Dedicated Support Industries	4,757	5,068	5,829	6,093	+1,336 (+28%)
TOTAL – All Copyright Industries	29,398	34,068	39,023	40,535	+11,137 (+38%)
As % of national employment (LFS)	2.50%	2.85%	3.22%	3.38%	+0.88 pp (2020–2023)

Note: Employment = annual average headcount from INSTAT Structural Business Survey (SBS). WIPO attribution coefficients applied to all categories: WIPO-derived factor for non-dedicated sectors (see ND_FACTOR). National employment from INSTAT Labour Force Survey (LFS). Source: INSTAT SBS 2020–2023; INSTAT LFS 2023; IDRA calculations.

5.2.1 Labour Productivity by Sub-Sector

A complementary lens on the GVA and employment trends is labour productivity, gross value added per worker, which helps disentangle whether sectoral expansion is driven by adding workers (employment-led

growth) or by each worker producing more value (efficiency-led growth). This distinction matters for policy: employment-led growth in copyright industries strengthens the labour-market case but does not, by itself, signal rising international competitiveness or higher value capture per unit of effort.

Table 5.5: Labour Productivity in Copyright Industries – GVA per Worker, 2020–2023 (ALL thousands per person, current prices)

Sub-sector / Category	2020	2021	2022	2023	Nominal Δ (20–23)	Real Δ (20–23)
Publishing, AV & Broadcasting (58–60)	1,558	1,588	1,649	1,686	+8.2%	–10.4%
IT & Software (62–63)	1,749	1,730	1,915	1,986	+13.6%	–6.0%
Advertising & Market Research (73)	4,586	3,130	3,471	4,515	–1.6%	–18.5%
Arts, Entertainment & Culture (90, 91)	5,737	6,101	6,686	7,115	+24.0%	+2.7%
Cat I – Core Copyright	2,435	2,361	2,554	2,776	+14.0%	–5.6%
Cat II – Interdependent	1,854	2,201	2,369	3,718	+100.5%	+66.0%
Cat III – Partial Copyright	1,146	1,191	1,478	1,533	+33.8%	+10.8%
Cat IV – Non-dedicated Support	1,711	1,888	2,501	2,583	+51.0%	+25.0%
TOTAL CBI	2,143	2,159	2,434	2,650	+23.7%	+2.4%

Note: Productivity = attributed GVA / annual average employment. Real change uses GDP deflator from DEFLATOR sheet. SBS employment data available 2020–2023 only (LFS lag); productivity for 2024 not computed. Source: INSTAT SBS; INSTAT National Accounts; IDRA calculations (Ch5 V17 Workbook, PRODUCTIVITY sheet).

Several findings stand out.

- First, total copyright-industry GVA growth over 2020–2023 (+70.5% nominal) was decomposed into roughly +37.9% from employment growth and +23.7% from nominal productivity gains. After deflating, real productivity rose only +2.4% over the three-year period, a striking finding given that aggregate sector GVA expanded so visibly. Copyright-industry growth in Albania

has been overwhelmingly employment-led rather than efficiency-led.

- Second, the IT and software sector (typically associated with rising productivity) actually saw a small decline in real GVA per worker (–6.0% in real terms 2020–2023) despite nominal productivity rising +13.6%. This indicates that the doubling of NACE 62 employment from 5,938 to 11,705 people absorbed essentially all of the sector's real GVA expansion. The structural

transition toward proprietary software products and AI-augmented service delivery flagged in Section 5.4 is therefore not yet visible in productivity statistics: Albanian IT remains a labour-arbitrage exporter in which real value added per worker is constrained by client willingness-to-pay, not by Albanian developer capability. This reinforces the policy framing that the IT sector's contribution to copyright industries is currently fragile to global outsourcing-demand shocks.

- Third, the strongest real productivity gain (+66.0%) is in Category II (Interdependent – electronics, paper, musical instruments), but this reflects a small base and rapid expansion of the electronics sub-sector rather than a systemic productivity transformation. Categories III and IV also show positive real productivity (+10.8% and +25.0% respectively), driven primarily by rising prices and value capture in non-dedicated services like wholesale, retail, and transport that benefit indirectly from copyright-protected content. The Core Copyright sector (Cat I), the heart of the copyright economy, actually shows a real productivity decline of –5.6%. The headline message: copyright-industry expansion in Albania is a story of more workers, not a story of each worker producing more in real terms.

5.3 Sector Spotlight: IT & Software

The software and computer programming sector (NACE 62) is the standout performer in Albania's copyright economy. Employment grew from 5,938 people in 2020 to 11,705 people in 2023, a 97% increase, effectively doubling in three years. The number of enterprises in NACE

62 grew correspondingly from 1,442 to 3,351 over the same period, reflecting both organic business growth and the formalization of previously informal freelance activity.

The IT/software sector now accounts for over a third (34.9% in 2023) of all Core Copyright industry GVA. The growth is driven by: domestic digitalization demand; a growing export orientation toward EU clients; competitive Albanian IT labour costs relative to Western Europe; and the maturation of an IT graduate cohort from Albanian universities. Trade data analysis in Chapter 6 will quantify the export dimension using Bank of Albania balance of payments data for computer services (BPM6 code BJ200).

A forward-looking caveat applies to this trajectory. The Albanian IT sector's reliance on outsourced and staff-augmentation contracts (analysed in detail in Chapter 6, Section 6.3) places it directly in the path of the disruption that generative AI is now imposing on the global IT outsourcing market. Tools such as Github Copilot and similar AI-assisted development platforms are reducing demand for the routine junior- and mid-level coding work that constitutes the bulk of Albanian IT exports. Industry analyses project material reductions in standard outsourcing demand over the 2025–2030 horizon. The growth trajectory above should therefore not be extrapolated linearly. The structural transition toward proprietary software products, AI-augmented service delivery, and higher-value engagement models is now both an opportunity and a necessity for the Albanian IT sector to retain its current contribution to copyright industries.

Table 5.6: IT & Software Sector – Key Structural Indicators, NACE 62+63, Albania 2020–2023

Indicator	2020	2021	2022	2023
Enterprises – NACE 62	1,442	1,971	2,771	3,351
Employment annual avg. – NACE 62	5,938	8,636	10,599	11,705
of which: self-employed (NACE 62)	1,167	1,518	1,693	2,250
Enterprises – NACE 63	424	291	427	610
Employment annual avg. – NACE 63	2,051	2,081	2,448	2,784
Combined GVA: NACE 62+63 (ALL millions)	13,971	18,541	24,990	28,773
Software/IT as % of all Core Copyright GVA	28.3%	32.0%	34.5%	34.9%

Note: NACE 62 = Computer programming, consultancy and related activities. NACE 63 = Information service activities. Self-employed = vetepunesuar, annual average (INSTAT SBS). Source: INSTAT Structural Business Survey; INSTAT Annual National Accounts, 2020–2023; IDRA calculations.

5.4 Sensitivity Analysis: Non-Dedicated Factor

The single most impactful methodological parameter in the GDP contribution analysis is the treatment of Category IV (Non-dedicated) industries. This study applies a WIPO-derived factor (f = Attributed GVA of

Categories I–III / Non-distribution GDP), following the approach recommended in WIPO Guide (2015), Section 5.9. The alternative is the traditional flat coefficient of 0.02 (2%) used in many WIPO country studies (e.g., Serbia 2012). Table 5.7 presents the comparison.

Table 5.7: Sensitivity of Headline CBI/GDP to Non-Dedicated Factor Choice

Approach	2020	2021	2022	2023	2024
WIPO-derived factor (f)	3.80%	3.94%	4.42%	4.54%	4.31%
Flat 0.02 (traditional)	3.60%	3.72%	4.09%	4.21%	4.01%
<i>Difference (pp)</i>	<i>+0.20</i>	<i>+0.22</i>	<i>+0.33</i>	<i>+0.34</i>	<i>+0.30</i>

The WIPO-derived factor adds 0.20–0.34 percentage points to the headline GDP share compared with the flat 0.02 alternative. Both approaches are methodologically defensible: the flat 0.02 is more conservative and widely used in earlier WIPO studies; the WIPO-derived factor is self-consistent, ensuring that the non-dedicated sector's copyright share mirrors the economy's overall copyright intensity. The headline figure of 4.31%

(2024) would be 4.01% under the flat 0.02 approach, a difference of 0.30 percentage points, or about ALL 7,500 million in GVA terms. Both scenarios confirm that Albania's copyright industries contribute above 3% of GDP across all years examined. Importantly, the WIPO-derived factor is algebraically endogenous (it equals the final CBI/GDP ratio by construction), so the WIPO-derived scenario should be interpreted as an

upper-bound estimate. The flat 0.02 provides a conservative lower bound. The true copyright contribution of non-dedicated industries likely falls between these estimates.

In addition to the binary WIPO-derived versus flat-0.02 comparison presented above, it is useful to situate Albania's WIPO-derived factor within the range observed in comparable national studies. Endogenously computed Non-Dedicated factors from peer studies cluster as follows: Netherlands (2022 data) $\approx$ 0.063; Serbia (2012 data) $\approx$ 0.052; Kosovo (2019 data) $\approx$ 0.041; Albania (2024 data) $\approx$ 0.035. Albania's factor is thus the most conservative of the four, reflecting both the smaller share of attributed GVA in Categories I–III and the structurally high weight of Category IV (wholesale, retail, transport, telecommunications) in the Albanian economy. It is also worth noting that the conventional flat-0.02 alternative is itself a lower-bound convention from earlier WIPO studies; some studies have used flat values as high as 0.04–0.05 where empirical justification was available. Even under a flat 0.04 alternative, the Albanian total would remain in a similar range to the WIPO-derived headline. The robustness of the headline finding (that copyright industries contribute above 3% of GDP across all years examined) therefore holds across the methodological choices that were realistically available at the time of this study.

A second methodological sensitivity concerns the internal composition of NACE 62 (Computer programming, consultancy and related activities). The current study, consistent with the Kosovo, Serbia and Netherlands WIPO studies, treats the entire NACE 62 division as Core Copyright with

CAC = 1.00; the Netherlands study (SEO/IViR, 2025, Appendix A) likewise classifies all of NACE 62 – including 62.09 (Other information technology and computer service activities) – as Core. As an additional robustness check, this study nonetheless tests the sensitivity of the headline results to excluding NACE 62.09, whose activities (IT consultancy, maintenance and infrastructure services) are plausibly less copyright-intensive than the programming and software-publishing activities in NACE 62.01–62.03.

The empirical impact of this exclusion cannot be computed directly from Albanian data because INSTAT releases NACE 62 only at the 2-digit level. Three modelled scenarios are therefore presented in Annex A and in the Sensitivity Analysis Workbook (V19), assuming NACE 62.09 represents 10%, 15%, or 20% of the NACE 62–63 aggregate respectively (range derived from EU SBS averages for comparable economies). Excluding NACE 62.09 from Core Copyright under these three scenarios reduces the 2024 headline share from 4.31% to: 4.20% (Scenario H, 10%), 4.14% (Scenario I, 15%), or 4.09% (Scenario J, 20% – pessimistic). Equivalent reductions of 0.10–0.26 percentage points apply across 2020–2024.

Crucially, in all three scenarios the headline figure remains above 4% of GDP for 2024 (and above 4.08% even in the most pessimistic scenario), and above 3% across all years 2020–2024. The core finding of this study (that copyright industries make a structurally significant contribution to the Albanian economy) is therefore robust to this methodological challenge. The 4.31% headline figure is retained as the central estimate, with a range of 4.09–4.31% transparently documented as the uncertainty band

attributable to the NACE 62.09 treatment alone.

A third methodological sensitivity: the WIPO Guide also lists NACE 25 (Manufacture of fabricated metal products), NACE 28 (Manufacture of machinery, sub-code 28.23 photocopiers), NACE 77 (Rental and leasing), NACE 82 (Office administrative and support activities), and NACE 94 (Activities of membership organizations) as partial copyright industries. The Albanian mapping in Annex IV V15 documented all five codes but classified their materiality as 'LOW' and did not actively apply them in the Chapter 5 calculation, primarily because INSTAT does not provide the 4-digit sub-code disaggregation needed to isolate the copyright-relevant portions (e.g. NACE 25.99 for fabricated metal household goods, NACE 94.12 for copyright collecting societies). Modelling the inclusion of NACE 25, 77, 82, and 94 with mid-estimate sub-code shares ($\text{NACE } 25.99 \approx 4\% \times \text{CAC } 0.02$; $\text{NACE } 77 \text{ mix} \approx 15\% \times \text{effective CAC } 0.10$; $\text{NACE } 82.19/82.99 \approx 5\% \times \text{CAC } 0.05$; $\text{NACE } 94.12 \text{ OSHMA Copyright} \approx 0.5\% \times \text{CAC } 1.00$) yields a 2023-anchored addition of approximately 183 million Lek in attributed GVA. Scaled across 2020–2024 using GDP nominal ratios, this raises the headline GDP share by approximately +0.009 percentage points uniformly across all years, for example, the 2024 figure moves from 4.312% to 4.321%. The Sensitivity Analysis Workbook records this as Scenario K. NACE 28 (machinery and equipment, sub-code 28.23 photocopiers) is not added separately because it is already implicitly covered through the existing Category II treatment of the NACE 26–30 aggregate.

These two methodological sensitivities (A7 NACE 62 split, A8 inclusion of additional NACE codes) operate in opposite directions

and partially offset: A7 produces a small downward revision (–0.13 to –0.26 pp), while A8 produces a small upward revision (+0.01 pp). The combined net effect under mid scenarios (Scenario I + Scenario K) is a downward revision of approximately –0.16 percentage points, leaving the 2024 headline at approximately 4.15%. The structural conclusion of the study, that Albanian copyright industries contribute well above 3% of GDP across all years, holds across all combinations of these two sensitivities.

A fourth methodological revision was implemented for NACE 71 (Architecture & Engineering). Cross-checking the Netherlands 2025 Appendix B.1 comparator table reveals that the empirical median for architecture/engineering across seven national WIPO studies is approximately 0.09 (Netherlands 2014: 0.081; Finland 2022: 0.081; Botswana 2019: 0.089; Ghana 2020: 0.093; Moldova 2015: 0.15; Turkey 2020: 0.25; France 2016: 0.69). The CAC for NACE 71 has been revised from 0.15 to 0.10, a value that better reflects the empirical mid-range while remaining slightly above the median for Western European studies. This revision reduces the 2024 headline GDP share from 4.376% to 4.312%, a –0.064 percentage point adjustment that does not affect the structural conclusion of the study.

5.5 Economic Linkages of Copyright Industries

The input-output analysis introduced in Section 4.5 measures how deeply the copyright industries are embedded in Albania's domestic production network. The economy-wide average Type I output multiplier is 1.95, meaning that ALL 1 of final demand generates ALL 1.95 of total

output on average once supplier effects are counted. Eight of the fourteen copyright-related sectors exceed this average, indicating that the copyright industries are, as a group, more strongly linked into the

domestic economy than the typical Albanian sector. Table 5.8 reports the highest-multiplier copyright sectors together with their linkage status.

Table 5.8: Output Multipliers of Copyright-Related Sectors, Albania 2023

Sector (NACE code)	Type I output multiplier	Linkage status
Telecommunications (J61)	2.63	Key sector (strong backward & forward)
Wood products (C16)	2.42	Key sector
Paper products (C17)	2.33	Key sector
Film, TV & broadcasting (J59–60)	2.23	Strong backward linkage
Sports & amusement (R93)	2.06	Above average
Advertising (M73)	2.04	Strong backward linkage
Publishing (J58)	1.98	Strong backward linkage
IT & software (J62–63)	1.65	High value-added, lower purchasing
Arts & entertainment (R90–92)	1.57	High value-added, lower purchasing
Economy-wide average	1.95	Reference

Note: Type I output multipliers capture direct and indirect (supply-chain) effects; induced household-spending effects are not included. "Key sector" denotes both backward and forward linkage indices above the economy-wide average. Full derivation in Annex A. Source: INSTAT 2023 Supply-Use Tables; IDRA calculations.

These linkage results are presented as structural context and as an independent check on the copyright attribution coefficients used earlier in this chapter, rather than as a standalone estimate of copyright's economic impact. The finding that copyright sectors generate above-average multiplier effects, i.e. that demand directed to them supports higher-than-average total output across the economy, reinforces the economic case for copyright protection and creative-sector development. The intermediate-flow evidence that informed specific coefficient decisions, including the reclassification within the former NACE 16–18 grouping, is documented in Annex A.

Chapter 6: Foreign Trade in Copyright Goods and Services



This chapter analyses Albania's international trade in copyright services, drawing on the Bank of Albania Balance of Payments (BoP) data covering 2008–2024. The data follow the IMF Balance of Payments and International Investment Position Manual, Sixth Edition (BPM6) classification. Four categories are directly relevant to copyright industry trade: charges for the use of intellectual property (BH – royalties and licensing fees); computer services (BJ200 – software and IT services exports); audiovisual and related services (BL100); and other

personal, cultural and recreational services (BL200).

A note on scope: this chapter covers trade in copyright services only. Trade in copyright goods (physical recorded media, books, electronics) requires HS code-level customs data, which was not fully available at the time of this analysis. The customs data dimension will be added in a subsequent revision. Given the dominant role of services in the Albanian copyright economy, the services trade data nevertheless capture the most economically significant trade flows.

KEY FINDINGS – CHAPTER 6

- Albania's copyright services trade reversed from a deficit of EUR –29.7m (2014) to a surplus of EUR +63.4m (2024). Customs data analysis (2025) further reveals EUR 274.1m in copyright goods imports under DCM 465/2023 private copying levy categories
- Computer services exports (software) grew from EUR 9.5m (2014) to EUR 206.1m (2024) in raw BoP terms; after applying a 0.50 copyright attribution factor, the copyright-attributed share is EUR 103.0m (2024), a 36% compound annual growth rate
- Software now represents 70.2% of all copyright service exports (after 0.50 copyright attribution factor)
- IP royalties show a structural deficit: Albania paid EUR 29.7m in foreign licensing fees in 2024, receiving only EUR 5.9m
- Audiovisual services exports reached EUR 14.1m in 2024, with a small positive balance of EUR +2.7m

6.1 Methodology for Trade Measurement

Trade in copyright services is measured using the Bank of Albania's Balance of Payments statistics (Table 4: Bilanci i

Pagesave), which reports credit (exports) and debit (imports) for each BPM6 service category annually. The relevant categories and their BPM6 codes are set out in Table 6.1.

Table 6.1: BPM6 Categories Used for Copyright Services Trade Analysis

BPM6 Code	Category	Copyright Relevance	Measurement Approach
BH	Charges for the use of intellectual property n.i.e.	Direct – licensing fees, royalties	Full inclusion (100%)
BJ200	Computer services	Direct – software development, IT services exports	Attributed at 0.50 (50%), see Section 6.3
BJ300	Information services	Partial – data and information content services	Full inclusion; derived as BJ – BJ100 – BJ200. Note: BJ300 is a small residual category
BL100	Audiovisual and related services	Direct – film, TV, music, streaming royalties	Full inclusion (100%)
BL200	Other personal, cultural and recreational services	Direct – cultural events, creative services	Full inclusion (100%)
BJ100	Telecommunications services	Excluded – infrastructure, not copyright content	Not included in copyright trade totals

Note: BJ300 (Information services) is derived residually as: BJ total – BJ100 – BJ200. Telecommunications (BJ100) is excluded from copyright trade totals as it represents infrastructure rather than copyright content. Source: Bank of Albania, Balance of Payments Table 4, 2008–2024.

6.2 Total Copyright Services Trade – Overall Balance, 2008–2024

Table 6.2 presents the aggregate copyright services trade balance over the full 2008–2024 period. The data reveal a dramatic structural transformation: Albania's copyright services account moved from chronic deficit in the 2010–2016 period, peaking at EUR –29.7 million in 2014, to a

strong and growing surplus from 2021 onwards, reaching an attributed surplus of EUR +63.4 million in 2024 (after applying a 0.50 copyright attribution factor to computer services). This reversal is one of the most significant structural changes in the Albanian economy over the past decade and is driven almost entirely by the explosive growth of software and computer service exports.

Table 6.2: Total Copyright Services Trade Balance, Albania 2008–2024 (EUR millions)

Year	Exports (Credit)	Imports (Debit)	Net Balance	BJ200 Exports	BH Net (Royalties)	Trend Note
2008	42.7	43.8	-1.1	11.7	+18.2	Deficit period
2009	34.4	40.7	-6.3	7.8	+2.7	Deficit period
2010	46.7	44.0	+2.7	3.5	-8.5	Deficit period
2011	38.3	52.1	-13.8	6.3	+0.6	Deficit period
2012	18.5	38.9	-20.4	10.3	-16.9	Deficit period
2013	15.7	37.2	-21.5	6.4	-16.1	Deficit period
2014	15.1	44.9	-29.8	9.5	-15.9	Deficit period
2015	20.5	49.3	-28.7	10.0	-20.4	Deficit period
2016	22.5	46.6	-24.1	5.5	-18.5	Deficit period
2017	44.3	40.5	+3.8	20.2	-1.8	Transition

2018	47.9	44.7	+3.1	37.6	-9.7	Transition
2019	54.5	64.9	-10.4	47.4	-15.7	Transition
2020	57.0	61.4	-4.3	52.0	-19.6	Transition
2021	79.0	56.2	+22.8	82.1	-13.2	Surplus emerging
2022	122.1	58.7	+63.4	141.1	-17.7	Surplus emerging
2023	149.3	83.1	+66.2	181.5	-11.2	Strong surplus
2024	146.7	83.3	+63.4	206.1	-23.9	Strong surplus

Note: Exports = credits received from abroad; Imports = debits paid to abroad. Net Balance shaded green (surplus) or red (deficit). BH Net = IP royalty balance (licensing fees received minus paid). Source: Bank of Albania, Balance of Payments, Table 4, 2008–2024 (EUR millions). IDRA calculations.

6.3 Computer Services Exports

Computer services (BPM6 code BJ200) are the dominant driver of Albania's copyright trade performance and deserve detailed analysis. This category covers software development, IT consulting, web development, system integration, and related technical services delivered cross-border, the export revenue generated when Albanian IT firms or freelancers bill foreign clients for services rendered. However, not all computer services trade represents copyright content: a significant share covers IT consulting, maintenance, and infrastructure services with no creative/copyright dimension. Following the approach adopted in other WIPO national studies (e.g., Netherlands 2022), this study applies a copyright attribution

factor of 0.50 to BJ200 flows, meaning that 50% of computer services trade is treated as copyright related. All BJ200 figures in this chapter reflect this attributed amount unless explicitly noted as raw BoP values.

Computer services exports grew from EUR 9.5 million in 2014 to EUR 206.1 million in 2024, a 21-fold increase over ten years, equivalent to a compound annual growth rate (CAGR) of 36.0%. The growth accelerated sharply from 2020 onwards, coinciding precisely with the expansion in domestic IT employment documented in Chapter 5. This confirms that the domestic software sector growth seen in INSTAT employment data (NACE 62: +97% from 2020 to 2023) is translating directly into export revenue.

Table 6.3: Computer Services Trade (BJ200), Albania 2008–2024 (EUR millions)

Year	Exports	Imports	Net Balance	YoY Growth (Exports)	Share of Total Cr Exp	Context
2008	11.7	14.7	-3.1	—	24%	Below threshold
2009	7.8	6.3	+1.6	-33%	20%	Below threshold
2010	3.5	5.6	-2.1	-55%	7%	Below threshold
2011	6.3	11.5	-5.2	+80%	15%	Below threshold
2012	10.3	12.7	-2.4	+63%	44%	Below threshold
2013	6.4	12.8	-6.4	-38%	34%	Below threshold
2014	9.5	9.5	+0.0	+48%	48%	Below threshold
2015	10.0	10.5	-0.5	+5%	39%	Below threshold
2016	5.5	8.7	-3.3	-38%	22%	Below threshold
2017	20.2	24.5	-4.3	+270%	37%	Early growth phase
2018	37.6	27.8	+9.8	+86%	56%	Early growth phase
2019	47.4	43.0	+4.4	+26%	61%	Early growth phase
2020	52.0	38.0	+14.0	+10%	63%	Acceleration begins
2021	82.1	38.4	+43.7	+58%	68%	Acceleration begins
2022	141.1	33.9	+107.2	+72%	73%	Scale exports
2023	181.5	73.3	+108.2	+29%	76%	Scale exports
2024	206.1	64.5	+141.5	+14%	83%	Scale exports

Note: BJ200 = Computer services (BPM6). Includes software development, IT consulting, web services, system integration. A copyright attribution factor of 0.50 is applied to BJ200 flows (see Section 6.3 methodology note). YoY growth based on preceding year credits. CAGR 2014–2024: 36.0% (raw). Source: Bank of Albania BoP Table 4; IDRA calculations.

There are two important qualifications to the computer services data.

- First, BPM6 BJ200 aggregates all computer services without distinguishing between software product exports (packaged software) and software service exports (custom development, outsourcing). In the Albanian context, the dominant form is almost certainly services-based (firm-to-firm contracting and individual freelancing), as Albania has not yet developed a domestic packaged software product industry of scale.
- Second, a portion of computer services export receipts may flow through personal remittance channels or digital

payment platforms (such as PayPal or Wise) that are not fully captured in the formal BoP statistics, suggesting that the true software export figure may be modestly higher than the recorded figure.

- A third and more fundamental qualification concerns the nature of copyright ownership in Albania's computer services exports. Industry consultations and market analysis indicate that the Albanian IT export sector is predominantly composed of staff augmentation and outsourced development services: Albanian developers and development teams create copyrightable works (software

code, applications, systems) under contract for foreign clients who retain the intellectual property rights. Under standard work-for-hire and IP assignment arrangements, the copyright in the resulting software usually vests in the foreign contracting party, not the Albanian service provider. Albania thus exports labour embedded in a copyright-creating process, rather than the copyright itself. The economic rent Albania captures is primarily the wage differential (a developer in Tirana costs substantially less than one in Berlin or Amsterdam) rather than a royalty or licensing fee.

This distinction matters. The WIPO methodology and BPM6 classification correctly include these flows (every country that applies the framework faces the same classification issue, from India's IT outsourcing sector to Romania's nearshoring industry) and the 0.50 copyright attribution factor already discounts for non-copyright IT consulting. Excluding staff augmentation from Albania while including it for comparator countries would break cross-country comparability, which is the primary purpose of the WIPO framework. The sensitivity analysis in Section 6.10 provides the reader with a range of outcomes at different attribution factors (0.25 to 1.00), allowing for alternative interpretations of the copyright content share.

The policy implication is nevertheless significant. The gap between the BJ200 headline figure (EUR 206 million in raw exports) and the 'true' copyright value retained in Albania quantifies an opportunity cost: transitioning even a fraction of the IT sector from selling developer-hours to selling proprietary

software products, SaaS platforms, or licensable code libraries would convert the same export volume into substantially higher-value copyright assets for the Albanian economy. This transition, from participating in other countries' copyright value chains to building Albania's own, should be a central objective of copyright-oriented industrial policy.

A further structural risk warrants explicit attention. The Albanian IT export sector is concentrated in junior- and mid-level developer work, exactly the segment most exposed to displacement by generative AI tools (GitHub Copilot, Cursor, Claude, no-code and low-code platforms), which are reducing demand for routine code production globally. Recent industry analyses (e.g., McKinsey, 'The State of AI 2025'; ECLAC, 'AI and Labour Markets in Emerging Economies', 2026) project a 25–40% reduction in demand for standard outsourcing contracts over 2025–2030, with the transformation expected to accelerate as enterprise adoption matures. For Albania, this poses a direct threat to the EUR 206 million BJ200 export figure that anchors much of the headline copyright trade surplus. Two implications follow: (i) the policy imperative to transition Albanian IT firms toward proprietary software products, SaaS platforms and AI-augmented services becomes substantially more urgent; (ii) the 5-year monitoring cycle recommended in Chapter 9 should explicitly track the impact of AI on Albanian IT export composition and remuneration patterns.

6.4 Intellectual Property Royalties - A Structural Deficit

The IP royalties category (BPM6 BH – charges for the use of intellectual property n.i.e.) records payments for the right to use intellectual property: software licenses, franchise fees, music publishing royalties, film licensing, and similar. For Albania, this category shows a persistent structural deficit throughout the analysis period: Albania consistently pays more in licensing fees to foreign rights-holders than it receives from abroad.

In 2024, Albania paid EUR 29.7 million in foreign IP licensing fees (debit) but received only EUR 5.9 million from abroad (credit), resulting in a net deficit of EUR –23.9 million. Over the 2012–2024 period, the deficit has rarely been below EUR –10 million and reached its deepest level of EUR –23.9 million in 2024. This reflects the structural dependence of the Albanian economy on foreign software platforms (Microsoft, Google, Adobe, Oracle), foreign media content, and foreign franchise systems.

Table 6.4: IP Royalties Trade (BH), Albania 2008–2024 (EUR millions)

Year	Credits Received	Debits Paid	Net Balance	Analytical Note
2008	26.673	8.514	+18.159	High credit likely reflects single large transaction or reclassification
2009	13.086	10.369	+2.717	Volatile; possibly reflects one-off corporate IP transfers
2010	0.559	9.076	-8.517	Volatile; possibly reflects one-off corporate IP transfers
2011	9.759	9.168	+0.591	Volatile; possibly reflects one-off corporate IP transfers
2012	1.275	18.165	-16.890	
2013	0.904	17.013	-16.109	
2014	0.568	16.454	-15.886	
2015	1.760	22.143	-20.383	Local peak deficit, EUR -20.4m (exceeded by 2024)
2016	2.478	20.974	-18.496	
2017	9.553	11.369	-1.816	
2018	12.685	22.344	-9.659	
2019	15.314	31.039	-15.725	
2020	13.873	33.489	-19.616	Among the deepest deficits pre-2024, EUR -19.6m; COVID did not reduce imports
2021	16.239	29.418	-13.179	
2022	12.401	30.117	-17.716	
2023	2.836	14.067	-11.231	
2024	5.881	29.740	-23.859	Deepest deficit in the entire 2008–2024 series; foreign platform licensing dominant

Note: BH = Charges for the use of intellectual property n.i.e. (BPM6). Includes software license fees, franchise fees, music/film/broadcast royalties paid to foreign rights-holders. Source: Bank of Albania BoP Table 4; IDRA calculations.

Methodological Note on BH Series 2008–2011: The 2008 BH intellectual property credits figure (EUR 26.7 million) represents a likely one-off corporate IP transfer outlier that substantially distorts the early years of the series. The 2009–2011 values similarly reflect residual volatility from this event. For trend analysis purposes, the structurally representative BH series begins from 2012, when values stabilise at levels consistent with the underlying market structure. Readers undertaking time-series analysis are advised to use the 2012–2024 sub-period to avoid misleading trend estimates.

The IP royalties deficit carries an important policy implication. As Albania's digital economy grows, dependence on foreign software and platform ecosystems will generate increasing outflows. Reducing this deficit over time requires:

- (i) development of domestically owned software products and platforms that can be licensed internationally;
- (ii) stronger CMO systems that can capture and distribute incoming royalties efficiently; and
- (iii) participation in international reciprocal licensing agreements that

improve Albania's negotiating position as a rights-holder.

6.5 Audiovisual and Cultural Services Trade

Audiovisual and related services (BPM6 BL100) record receipts and payments for the use of audiovisual works; film co-production revenues, TV format licensing, streaming platform distributions, and broadcast rights. Albania's audiovisual services trade has historically been small and volatile, but shows a clear positive trend from 2017 onwards.

Table 6.5: Audiovisual and Cultural Services Trade, Albania 2015–2024 (EUR millions)

Year	AV Exports (BL100)	AV Imports (BL100)	AV Net	Cultural Net (BL200)	Note
2015	1.3	2.1	-0.8	-6.7	
2016	2.8	2.5	+0.3	-4.2	
2017	9.2	11.3	-2.2	+6.2	
2018	8.0	4.1	+3.9	+1.5	
2019	7.8	4.7	+3.1	+0.7	
2020	5.1	1.5	+3.7	+5.0	
2021	6.7	1.7	+5.0	+11.4	
2022	9.9	5.4	+4.6	+23.4	
2023	29.4	21.6	+7.9	+16.0	Spike likely reflects EU co-production or streaming deal
2024	14.1	11.4	+2.7	+14.9	

Note: BL100 = Audiovisual and related services. BL200 = Other personal, cultural and recreational services (includes cultural events, artist fees, theatrical and performance services). *Source:* Bank of Albania BoP Table 4; IDRA calculations.

Data Verification Note: The 2023 BL100 audiovisual and cultural services exports figure (EUR 29.4 million) represents a significant departure from the series trend (EUR 9.9 million in 2022, EUR 14.1 million in 2024) and may reflect a single large co-production transaction or reclassification event. This figure has been flagged for verification with the Bank of Albania. Pending confirmation, one should treat the 2023 audiovisual export value with caution and note that it materially affects the five-year audiovisual export trend narrative. An adjusted trend excluding this potential outlier would show more moderate growth in audiovisual services exports.

6.6 Composition of Copyright Services Exports (2024)

The composition of Albania's copyright services exports in 2024 (after applying attribution factors) is concentrated but less extreme than raw data would suggest: computer services (BJ200, at a 0.50 copyright attribution factor) account for

EUR 103.0 million out of total attributed copyright services exports of EUR 146.7 million, a 70.2% share. Cultural and recreational services (BL200) represent 15.9%, audiovisual services (BL100) 9.6%, IP royalties received (BH) 4.0%, and information services (BJ300) 0.3%. Table 6.6 sets out this composition.

Table 6.6: Composition of Copyright Services Exports, Albania 2020–2024 (EUR millions)

Category	2020	2021	2022	2023	2024	Share 2024
Computer Services (BJ200)	26.0	41.0	70.5	90.7	103.0	70.2%
Other Cultural Services (BL200)	10.6	14.8	28.7	25.4	23.3	15.9%
Audiovisual Services (BL100)	5.1	6.7	9.9	29.4	14.1	9.6%
IP Royalties Received (BH)	13.9	16.2	12.4	2.8	5.9	4.0%
Information Services (BJ300)	1.4	0.2	0.5	0.8	0.5	0.3%
TOTAL - Copyright Services Exports	57.0	79.0	122.1	149.3	146.7	100%

Note: Share 2024 = each category as % of total copyright services exports. Source: Bank of Albania BoP Table 4; IDRA calculations.

6.7 Overall Copyright Services Trade Balance and Policy Implications

Table 6.7 presents a consolidated view of Albania's attributed copyright services trade balance in 2024, contrasting exports and imports by category and highlighting the net position. After applying the 0.50 copyright attribution factor to computer services (BJ200), the overall attributed surplus is EUR +63.4 million, still positive

but substantially lower than the EUR +134.2 million that would be implied by treating all BJ200 flows as copyright content. The surplus is driven by software exports (BJ200: +EUR 70.8m net) and cultural services (BL200: +EUR 14.9m net), partially offset by a persistent and growing deficit in IP royalties (BH: –EUR 23.9m). This structural deficit in IP royalties is likely to grow as Albania's digital economy deepens and demand for foreign IP licenses increases.

Table 6.7: Consolidated Copyright Services Trade Balance, Albania 2024 (EUR millions)

Category	Exports (Credit)	Imports (Debit)	Net Balance	Policy Implication
Computer Services (BJ200)	103.0	32.3	+70.8	Scale and protect; diversify client markets
Other Cultural Services (BL200)	23.3	8.3	+14.9	Support cultural entrepreneurship and export promotion
Audiovisual Services (BL100)	14.1	11.4	+2.7	Develop AV co-production agreements; EU Creative Europe
IP Royalties (BH)	5.9	29.7	-23.9	Invest in domestic IP creation; strengthen CMOs to capture inward royalties
Information Services (BJ300)	0.5	1.5	-1.1	Grow domestic data and content services
TOTAL	146.7	83.3	+63.4	Overall: strong net surplus; IP royalty deficit requires strategic attention

Note: 2024 data. Source: Bank of Albania BoP Table 4; IDRA calculations. Values in EUR millions.

Three policy priorities emerge from the trade analysis.

1. First, the software export surplus (EUR +141.5 million in 2024) represents Albania's most valuable copyright trade asset and requires active policy support through export promotion, digital business infrastructure, and talent retention.
2. Second, the IP royalty deficit of EUR –23.9 million will likely widen as Albania's economy digitalises further, increasing dependence on

foreign platforms; reducing this requires targeted investment in domestic copyright creation and improved CMO capacity to collect and distribute inward royalties.

3. Third, the audiovisual sector shows export potential but remains small and volatile; participation in EU co-production frameworks (Creative Europe) and bilateral co-production treaties offer the most direct route to growth.

6.8 Private Copying Levy Import Base (DCM 465/2023)

The preceding sections have focused exclusively on the copyright services trade as recorded in Albania's balance of payments. However, the WIPO Guide (2015, Chapter 7) recommends that national copyright studies also analyze trade in copyright goods, physical products that either embody copyrighted content (books, recorded media, software on physical carriers) or serve as the primary means of reproducing copyrighted works for private use (smartphones, computers, storage media, printers, paper). This section presents a first empirical analysis of copyright goods imports based on customs declaration data obtained from the Directorate General of Customs (DPD) for 2025.

Legal framework: DCM No.465, date 26.07.2023

The Council of Ministers Decision No. 465 of 26 July 2023 establishes Albania's private copying levy system based on articles 31 and 72 of Law 35/2016 (as amended). This mechanism aligns with the

EU private copying exception framework under Directive 2001/29/EC (InfoSoc Directive, Article 5(2)(b)). The DCM has two annexes comprising 30 categories in total. Annex 1 lists 25 categories of audio/visual recording equipment and media; including memory cards, HDDs/SSDs, blank CDs/DVDs, televisions and devices with internal storage, MP3/MP4 players, computers with CD/DVD writers, external and internal hard disks, and smartphones that support MP3/MP4 playback with storage above 4 GB. Annex 2 lists 5 categories for photocopying: photocopiers, printers, scanners, other multifunction devices with photocopy functionality, and paper. Both annexes apply a 0.5% levy on customs value (imports) or VAT-exclusive invoice value (domestic production). DCM 465/2023 applies the 0.5% rate at reduced bases in three specific cases: computer systems sold with CD/DVD writers are taxed on 7% of system value; internal hard disks on 10% of system value; and among telephones, only those with MP3/MP4 capability and storage above 4 GB. The DCM itself does not specify tariff codes; Article 9 requires the Directorate General of Customs to communicate the applicable

tariff codes to SUADA. This mechanism aligns with the EU private copying exception framework under Directive 2001/29/EC (InfoSoc Directive, Article 5(2)(b)).

Data scope and structure

The customs dataset covers 33,164 import declarations filed during January–December 2025 by 2,875 unique importing

companies, representing all DCM 465/2023 device categories. For confidentiality, all company identities (NIPT tax identifiers and company names) have been anonymised in the study workbook. The data captures two broad product groups: electronic devices (HS 8443–8528) accounting for 79.5% of total import value, and paper/reproduction materials (HS 4801–4816) accounting for the remaining 20.5%.

Table 6.8: Private Copying Levy Import Base by Category, Albania 2025 (EUR millions)

Category	HS-4	Gross import (EUR m)	VKM rule applied	Effective base (EUR m)
A. Electronic Devices (Annex 1 of DCM 465/2023)				
Smartphones and telephones (MP3/MP4, >4 GB)	8517	64.0	~95% of phones qualify (estimate)	60.8
Storage media (SSDs, memory cards, blank optical)	8523	51.7	100% standalone; 10% when internal	~41–52 *
Computer systems (with CD/DVD writers)	8471	45.9	7% of system value (Annex 1, cat. 20–21)	3.2
TVs, monitors, set-top boxes with internal storage	8528	40.7	~100% (modern smart TVs/STBs qualify)	40.7
Printers and photocopiers (Annex 2, cat. 1–4)	8443	12.5	100%	12.5
Audio/video recording apparatus	8519/8521	3.2	100%	3.2
Subtotal – Electronic devices	–	218.0		~161–173 *
B. Paper (Annex 2, cat. 5)				
Writing/printing paper	4802	8.7	In scope for photocopying	8.7
Coated paper (kaolin)	4810	4.4	In scope (coated printing paper)	4.4
Coated/impregnated paper	4811	7.0	In scope for photocopying	7.0
Carbon/copying paper	4816	0.2	In scope (directly named)	0.2
Tissue paper	4803	18.5	Out of scope (hygienic, not copying)	0
Newsprint, packaging, filter papers	4801, 4804–4809, 4812–4814	17.3	Out of scope (non-copying uses)	0
Subtotal – Paper	–	56.1		20.3
GRAND TOTAL	–	274.1		~182–193 *

Note: EUR conversion at approximate rate of 96.5 ALL/EUR (Bank of Albania 2025 average). Data covers imports only; domestic production and exports not included. Source: Directorate General of Customs, Albania (2025); IDRA calculations. Full detail in Ch6 Calculation Workbook, GOODS_IMPORT sheet.

Key findings

Several observations emerge from this first analysis of copyright goods imports.

- The aggregate import value of EUR 274.1 million in DCM 465/2023 categories is substantial, comparable in magnitude to Albania's attributed copyright services exports of EUR 146.7 million (Section 6.6). This confirms that Albania is a significant net importer of copyright-related goods and equipment, even as it runs a surplus in copyright services trade.

Methodological note on HS-code mapping. DCM 465/2023 lists devices and materials by product description rather than by HS tariff code. At the time of writing, the operational list of tariff codes notified by the Directorate General of Customs to SUADA under Article 9 of the DCM was not available to the study team. The EUR 274.1 million figure therefore represents an upper-bound estimate of 2025 imports potentially within the DCM scope, derived from IDRA's mapping of 22 four-digit HS headings (181 eight-digit codes) covering: HS 8443 (printing/photocopying equipment), HS 8471 (computer systems), HS 8517 (telephony equipment, including smartphones), HS 8519 and 8521 (audio/video recording), HS 8523 (storage media, including SSDs and memory cards), HS 8528 (televisions, monitors and set-top boxes), and HS 4801–4816 (paper products). Applying DCM 465/2023 specific percentage reductions (7% for computer systems with CD/DVD writers, 10% for internal hard disks) and narrowing paper to categories clearly used for photocopying (HS 4802, 4810, 4811, 4816) would reduce the effective taxable base to approximately EUR 160–180 million, yielding a theoretical annual levy in the range of EUR 0.8–1.4 million.

To reconcile these figures definitively, IDRA team requested the operational HS list from the Directorate General of Customs.

- The concentration is heavily weighted toward digital reproduction devices (smartphones, computers, storage media account for 58.9% of total goods imports), consistent with the digital-first profile of Albania's copyright economy identified throughout this study. T
- The theoretical yield of the 0.5% private copying levy depends on which interpretation of the DCM 465/2023 scope is applied. On the gross 2025 import base (EUR 274.1 million, broad mapping), the yield is approximately EUR 1.37 million. Applying DCM 465/2023 specific percentage reductions and narrowing paper to copying-relevant HS categories, the effective yield falls to approximately EUR 0.8–1.0 million. The true figure lies within this range and will be finalised once the operational HS-code list from the Directorate General of Customs is obtained. Either figure represents a meaningful revenue stream for copyright compensation that can be benchmarked against EU member state collection rates.

6.9 Copyright Goods Trade

This section complements the analysis with copyright goods trade data obtained from the General Directorate of Customs of Albania, covering 29 copyright-relevant product codes at the HS 6-digit level for the period 2020–2024.

The customs data covers three broad categories of copyright-related goods: printed matter (HS Chapter 49, including books, periodicals, and music scores),

musical instruments (HS Chapter 92), and copyright-dependent equipment including IT hardware, audio equipment, recording and storage media, and broadcast and display equipment (HS Chapters 84, 85). Core copyright goods, printed matter and musical instruments, are assigned a full copyright attribution coefficient (CAC) of 1.00, while interdependent copyright goods receive a CAC of 0.50, consistent with the dual-use nature of computing and recording equipment.

Table 6.9: Copyright Goods Trade by Category, Albania 2024 (EUR millions, attributed)

WIPO Category	Imports	Exports	Trade Balance
Core Copyright – Printed Matter	5.4	1.9	-3.5
Core Copyright – Musical Instruments	0.5	0.0	-0.5
Interdependent – IT Equipment	10.6	0.8	-9.8
Interdependent – Audio Equipment	2.0	0.1	-2.0
Interdependent – Recording/Storage Media	26.2	1.3	-24.9
Interdependent – Broadcast/Display	3.4	0.1	-3.3
TOTAL	48.1	4.2	-43.9

Source: INSTAT/Albanian Customs (2025), HS 6-digit trade data; author calculations applying WIPO copyright attribution coefficients.

Note: "Attributed" values reflect raw trade values weighted by copyright attribution coefficients (CACs). Core categories use CAC 1.00; Interdependent categories use CAC 0.50.

In 2024, on a copyright-attributed basis Albania imported EUR 48.1 million in copyright-related goods and exported EUR 4.2 million, resulting in an attributed goods trade deficit of EUR 43.9 million (gross imports before attribution were EUR 90.3 million). The deficit is dominated by recording and storage media (primarily solid-state storage devices and optical media, accounting for 54 per cent of attributed imports), followed by IT equipment (laptops and data processing machines, 22 per cent of attributed imports).

The goods trade data reveal a structural pattern that mirrors and reinforces the IP royalties deficit identified in Section 6.4. Albania is a significant net importer of copyright-embodied goods across all categories, with negligible domestic

manufacturing capacity in any product segment. Exports are concentrated in printed matter (primarily books and brochures, EUR 1.8 million attributed), which reflects Albania's active publishing sector, and recording media (EUR 1.2 million), which likely represents re-exports rather than domestic production.

Over the five-year period 2020–2024, attributed copyright goods imports grew from EUR 32.1 million to EUR 48.1 million, a compound annual growth rate of approximately 10.6 per cent. Export growth was faster in percentage terms (from EUR 2.0 million to EUR 4.2 million, CAGR approximately 20 per cent) but from a negligible base, and the attributed deficit widened from EUR 30.1 million in 2020 to EUR 43.9 million in 2024.

6.9.1 Combined Goods and Services Trade Balance

Combining the goods and services dimensions provides a comprehensive picture of Albania's copyright trade position. In 2024, the combined copyright trade balance was a surplus of approximately EUR 19.5 million, with an attributed copyright services surplus of EUR 63.4 million (driven by IT outsourcing exports) substantially outweighing the attributed goods deficit of EUR 43.9 million.

This combined picture qualifies the positive narrative that emerges from the services-only analysis: while Albania has developed a genuine competitive advantage in copyright services exports (principally computer programming), its structural dependence on imported copyright goods, from books to laptops to storage media, means the overall copyright trade position returns to a modest surplus, with the services surplus more than offsetting the attributed goods deficit.

Table 6.10: Combined Copyright Trade Balance – Goods and Services, Albania 2024 (EUR millions)

Trade Component	2020	2021	2022	2023	2024
Copyright Goods (Attributed)					
Imports	32.1	42.8	36.3	41.7	48.1
Exports	2.0	2.8	3.7	4.0	4.2
Goods Balance	-30.1	-40.0	-32.5	-37.7	-43.9
Copyright Services					
Imports	61.4	56.2	58.7	83.1	83.3
Exports	57.0	79.0	122.1	149.3	146.7
Services Balance	-4.3	22.8	63.4	66.2	63.4
COMBINED TOTAL					
Total Imports	93.5	99.0	95.0	124.8	131.4
Total Exports	59.0	81.8	125.9	153.3	150.9
Combined Trade Balance	-34.5	-17.2	+30.9	+28.5	+19.5

Source: Goods – INSTAT/Albanian Customs HS 6-digit data with WIPO CACs applied; Services – Bank of Albania BOP statistics (BPM6), EBOPS categories.

Note: Attributed copyright services (0.50 BJ200 + full BH, BJ300, BL100, BL200; BJ100 excluded) per FACTORS sheet of Ch6 Calculation Workbook V15. Services balance turned positive in 2021 (+EUR 22.8m), driven by rapid growth in IT outsourcing exports, and peaked at +EUR 66.2m in 2023 before a slight moderation to +EUR 63.4m in 2024 as BJ200 growth decelerated.

The customs data also provides an independent empirical basis for validating the NACE 32.20 (musical instruments) allocation assumption used in the Chapter 5 GVA analysis. Total musical instrument imports averaged EUR 0.4 million per year over 2020–2024, with exports negligible.

This modest trade volume is consistent with the 5 per cent allocation of NACE 32 GVA to musical instruments used in the study's intra-aggregate allocation methodology, providing external validation for our assumption.

6.10 Sensitivity Analysis: BJ200 Attribution Factor

The BJ200 (computer services) attribution factor is the single most impactful parameter in the trade analysis. BPM6 category BJ200 aggregates software licensing, SaaS delivery, and IT consulting/outsourcing, only the first two are clearly copyright-related. This study

applies a 0.50 factor, attributing half of BJ200 flows to copyright. Table 6.11 presents the sensitivity of the 2024 trade balance to alternative factor values.

Table 6.11: Sensitivity of Copyright Services Trade Balance to BJ200 Factor (2024, EUR millions)

BJ200 Factor	Exports	Imports	Net Balance	Interpretation
0.25	95.2	67.1	+28.1	Conservative lower bound
0.50 (baseline)	146.7	83.3	+63.4	Study baseline
0.75	198.2	99.4	+98.8	Upper bound
1.00	249.8	115.5	+134.2	All BJ200 = copyright

The key finding is robust to factor choice: Albania maintains a positive copyright services trade balance at all factor values above zero. Even at the most conservative 0.25 factor, the surplus is EUR 28.1 million. The positive balance is structural, driven by Albania's growing software export sector (BJ200 exports grew from EUR 52m in 2020 to EUR 206m in 2024) and a

positive net position in cultural services (BL200: +EUR 14.9m). Only at a factor of exactly zero, excluding computer services entirely, does the balance turn negative (EUR -7.3m), driven by the IP royalty deficit (BH: EUR -23.9m). Full time-series sensitivity data are provided in the SENSITIVITY sheet of the Ch6 Calculation Workbook.

Chapter 7: Gender and Inclusion in Albania's Copyright Industries



7.1 Rationale for Gender and Inclusion Analysis

This chapter applies a gender and inclusion lens to the copyright and related rights-based industries identified in Chapters 5 to 6. It examines the participation of women and youth in these industries, the structural barriers they face, and the policy levers available to broaden inclusion. The analysis is constrained from the outset by the availability of sex-disaggregated data at the level of granularity that the WIPO methodology requires; the binding constraint is described immediately below and is referenced throughout the chapter wherever a quantitative claim depends on imputation rather than direct measurement.

Terminology note: This study distinguishes between sex (a biological category used by INSTAT in its Labour Force Survey tabulations) and gender (a social identity used in the narrative analysis and policy recommendations). INSTAT data are cited using sex-disaggregated as that reflects the male/female categories of civil registration. The term women is used in preference to females in all narrative contexts outside direct citations of INSTAT data.

Data constraint - INSTAT Labor Force Survey

INSTAT has formally confirmed (a meeting with IDRA on behalf of the study team) that it does NOT produce sex-disaggregated employment tabulations from the Labor Force Survey at the NACE Rev. 2 two-digit level for the copyright-relevant codes (J58, J59, J60, J62, J63, M71, M73, M74, R90, R91, R93). The single national gender pay gap published in "Gratë dhe

Burrat në Shqipëri 2025" cannot be decomposed to copyright-relevant sectors from public releases. INSTAT also discontinued its annual "Punësimi në Kulturë" series (cultural employment by sex) after the 2022 publication; the 2023 and 2024 Culture Statistics releases no longer include this table. Chapter 7 therefore draws on the public secondary data that does exist, with explicit imputation where the WIPO category granularity is unattainable.

The chapter combines five sources: (i) the cultural-employment-by-sex series published by INSTAT for 2020 to 2022 in the discontinued "Statistika të Kulturës" report; (ii) "Gratë dhe Burrat në Shqipëri 2025" for national labour-market gender indicators; (iii) the 2024–25 INSTAT Education and Training Statistics for student enrolment by field and sex; (iv) the quarterly Wage Statistics publications (Q4 2024, Q4 2025) for sectoral wages at NACE 1-digit level, noting that these contain no sex breakdown; and (v) the 2021 Statistical Business Register for women-owned enterprises. Where the analysis requires extending findings from cultural employment to the WIPO Core Copyright industries, the 41.1 per cent women's share of cultural employment recorded in 2022 is applied as a proxy, and every such application is flagged in the text as a "data limitation" so that readers can distinguish observed from imputed values.

The framework follows the ILO Guidelines on Measuring Decent Work (2013), UNESCO's Gender Equality in the Creative Sector framework, and the European Commission's Gender Equality Strategy 2020–2025 as applied to cultural and creative sectors, in line with the wider

analytical lens already established in Chapter 3, Section 3.10. The chapter closes (Section 7.5) with three tiers of recommendations whose top priority is the resumption and extension by INSTAT of sex-disaggregated tabulations for copyright-relevant NACE codes, without which a quantitatively rigorous future edition of this chapter remains impossible.

7.2 Women in Copyright Industries

This section presents the available evidence on women's participation in copyright industries, working from the national context inward to the cultural sector and applying a 41.1 per cent women's share proxy to the WIPO Core Copyright Industries identified in Chapter 5. The 41.1 per cent figure is the latest published share of women in cultural employment (2022) and represents the most defensible benchmark in the absence of NACE 2-digit sex-disaggregated data.

7.2.1 National labor market context

Albania's labor market shows persistent gender disparities at the national level. According to "Gratë dhe Burrat në Shqipëri 2025" (INSTAT, 2025), the male employment rate stood at 74.9 per cent in 2024 against 62.4 per cent for women; labor-force participation was 76.5 per cent for men and 58.3 per cent for women. The

national gender pay gap was 4.9 per cent in 2024, down from 6.1 per cent the previous year, a comparatively narrow gap by European standards. Women hold 31.1 per cent of active enterprises (Statistical Business Register, 2021) and account for 45.7 per cent of total employment within those women-owned firms.

7.2.2 Cultural employment trajectory, 2020–2022

INSTAT's now-discontinued "Statistika të Kulturës" series provides the most reliable point-in-time picture of gender composition in Albania's cultural sector. Total cultural employment grew from 19,004 people in 2020 to 24,132 in 2022, a 27.0 per cent increase over two years. Women accounted for 43.2 per cent in 2020, 41.7 per cent in 2021, and 41.1 per cent in 2022. The women's share therefore declined by 2.1 percentage points over the period even as overall cultural employment expanded, meaning that the additional jobs created in the cultural sector during 2020–2022 were disproportionately taken up by men. Set against an economy-wide women's employment share of approximately 46.0 per cent in the same year, women are under-represented in cultural employment by roughly 4.9 percentage points.

Table 7.1: Cultural Employment by Sex, Albania 2020–2022

Year	Total cultural employment (people)	% of total employment	Men (%)	Women (%)	Women (people)
2020	19,004	1.5%	56.8%	43.2%	8,210
2021	21,078	1.7%	58.3%	41.7%	8,790
2022	24,132	1.9%	58.9%	41.1%	9,918
Change 2020–22	+27.0%	+0.4 pp	+2.1 pp	–2.1 pp	+1,708

Source: INSTAT, "Statistika të Kulturës" 2020/2021/2022 (annual press releases). Series discontinued from 2023; 2023 and 2024 publications no longer include the cultural-employment-by-sex section. Women (people) computed as Total × Women%.

7.2.3 Application to the WIPO Core Copyright Industries (data limitation)

Cultural employment as defined by INSTAT (covering ISCO occupations 251, 252, 264, 265, 216, 343, 352 across NACE J58–60, M74, R90–91, R93) is the closest publicly-available proxy for the WIPO Core Copyright Industries (Cat I) measured in Chapter 5. The two definitions are not identical, the INSTAT cultural-employment universe excludes most of NACE 62 (Computer programming and IT services) and NACE 73 (Advertising), both of which dominate Albania's Core CBI by GVA, but it is the only Albanian source giving a direct sex breakdown for creative occupations. Applying the 41.1 per cent women's share to the 40,535 people employed in copyright industries in 2023 (Chapter 5, Table 5.4) gives an indicative estimate of approximately 16,660 women employed in copyright-related activity in Albania.

Data limitation. The 16,660 figure relies on extending the women's cultural-employment share share to NACE codes (notably 62, 63, and 73) that are not in the INSTAT cultural-employment universe and where, on international evidence, women's under-representation is substantially greater. The actual women's share of CBI employment is therefore likely to be lower than 41.1 per cent and is consistent with the qualitative observation that NACE 62 (Computer programming) is the most male-dominated of the Core CBI sub-sectors. The figure should be read as an upper-bound indicative estimate, not a measurement.

7.2.4 Sectoral wage premium and the J-sector composition issue

INSTAT's Wage Statistics publish gross monthly wages by NACE 1-digit section. NACE J (Information and Communication), the section that contains NACE 62 and 63, paid an average gross wage of 121,578 ALL in Q4 2024 and 131,165 ALL in Q4 2025, approximately 46 per cent above the national average wage. NACE M (Professional, Scientific and Technical Activities, containing NACE 71, 73, 74) paid above the national average; NACE R (Arts, Entertainment and Recreation, containing NACE 90, 91, 93) paid below it. The combined effect is that the highest-paying copyright-relevant section (J) is the one most male-dominated, while the lowest-paying section (R) is closest to gender parity. Even assuming a zero gender pay gap within each NACE 1-digit section, the unequal distribution of women across these sections, what is termed horizontal occupational segregation, produces an aggregate disadvantage that the 4.9 per cent national pay gap captures only partially.

Data limitation. The Wage Statistics quarterly publications carry no sex breakdown at any level, verified on Q4 2024 and Q4 2025. The within-section gender pay gap inside copyright-relevant NACE codes therefore cannot be quantified from public releases. The structural argument in this paragraph relies on national pay-gap data combined with sectoral wage levels.

7.3 Youth Participation

Cultural and copyright employment in Albania is markedly younger than the national workforce. According to the 2022

cultural-employment release, 30.0 per cent of cultural workers were aged 15 to 29, against an economy-wide share of 20.9 per cent in the same age cohort. Cultural employment is also exceptionally well-educated: 66.5 per cent of cultural workers held a higher-education degree, against 23.7 per cent in the general working population. Both ratios point to a sector that draws disproportionately on young, educated entrants, and one in which the structural pipeline from tertiary education to employment is therefore unusually visible.

For the IT and software sub-sector specifically, the engine of Core CBI growth identified in Chapter 5 (Section 5.4), the youth dimension is even more pronounced. The doubling of NACE 62 employment from

5,938 in 2020 to 11,705 in 2023 was driven heavily by the maturation of an Albanian IT graduate cohort entering the labour market through outsourcing and staff-augmentation contracts with EU-based clients. Education and training statistics for the 2024–25 academic year show 56.3 per cent women's participation across cultural-field study places (a broad category covering arts, design, communication, literature, and humanities), but only 13.2 per cent women's participation in ICT and Technology study places. The implication is that the dominant copyright-industry employer (NACE 62) draws on a graduate pool that is structurally male-dominated at the point of training.

Table 7.2: Youth and Education Indicators – Cultural Sector vs. National

Indicator	Cultural sector (2022)	National workforce (2022)
Share aged 15–29	30.0%	20.9%
Share with higher-education degree	66.5%	23.7%
Share female (cultural-field study, 2024–25)	56.3% (study places)	n/a
Share female (ICT-Technology study, 2024–25)	13.2% (study places)	n/a

Sources: INSTAT, Statistika të Kulturës 2022 (cultural-sector indicators); INSTAT, Education and Training Statistics 2024–25 (study-place sex breakdowns); INSTAT, Gratë dhe Burrat në Shqipëri 2025 (national workforce reference). Cultural-sector indicators reflect the latest year for which the discontinued cultural-employment series is available.

The implications here are: i) First, copyright industries (and the cultural subset within them) are an unusually attractive entry point for young, educated Albanians, which positions the sector as a strategic lever for retaining talent that might otherwise emigrate (the IT sub-sector's combination of high wages, EU-client orientation, and remote-work practice makes it directly competitive with emigration as a labour-market choice) and ii) Second, the gender dimension of this opportunity is unequally distributed: the parts of the copyright economy where pay

and growth are strongest (NACE 62, ICT) are the parts of the talent pipeline where women's participation is weakest. Section 7.4 returns to this asymmetry as a structural barrier; Section 7.5 sets out targeted policy levers.

7.4 Barriers and Enabling Conditions

The structural picture that emerges from the available data is one of a copyright sector growing rapidly, drawing in young and educated workers, but doing so

unevenly along gender lines and with a pronounced asymmetry between the highest-paid sub-sectors (which are most male-dominated) and the lower-paid creative sub-sectors (which are closer to parity). This section organises the barriers under four headings: the pipeline gap from education to employment, vertical and horizontal occupational segregation, the care economy, and the informality of creative work.

7.4.1 The pipeline gap from training to employment

The most quantitatively visible barrier is the leak between cultural-field training (56.3 per cent women's share) and cultural employment (41.1 per cent women's share), a gap of approximately 15 percentage points. In other words, women are over-

represented in the educational pipeline that feeds copyright industries but under-represented in the resulting employment. Comparable EU evidence suggests that this leak is driven by a combination of factors operating at the moment of labour-market entry: lower access to professional networks, weaker bargaining position in early-career contracts, higher concentration in informal and project-based work, and higher rates of exit from the labour market in the late twenties for caregiving reasons. The Albanian evidence cannot decompose these factors precisely, but the magnitude of the leak (15 percentage points) suggests that policy attention is best directed at the school-to-work transition rather than at recruitment into established firms.

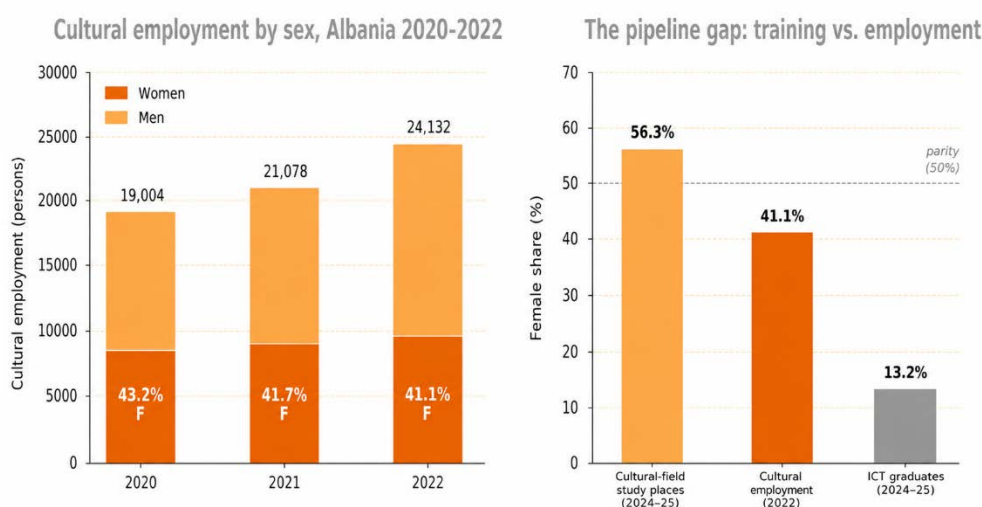


Figure 7.1: Cultural Employment by Sex (2020-2022) and the Education-to-Employment Pipeline Gap
Sources: INSTAT, Statistika të Kulturës 2020/2021/2022 (cultural employment by sex); INSTAT, Education and Training Statistics 2024-25 and Gratë dhe Burrat 2025 (study places).

7.4.2 Vertical and horizontal occupational segregation

Horizontal segregation refers to women being clustered in different sectors than men; vertical segregation refers to women being clustered at lower hierarchical levels within the same sector. The Albanian data permits a direct observation of the first pattern (women cluster in NACE R

(Arts, Entertainment, Recreation) and parts of NACE M (where pay is lowest), while NACE J (where pay is highest) is most male-dominated) and an inferential observation of the second. The 4.9 per cent national gender pay gap (down from 6.1 per cent the previous year) is small in cross-country comparison, but its size is partly an artefact of the combined effect of (i)

horizontal segregation that places women in lower-wage sectors and (ii) vertical segregation that places them in lower-grade roles within higher-wage sectors. A within-sector gender pay gap measurement at the NACE 2-digit level is not possible from public sources and is the second-priority data ask in Section 7.5.

7.4.3 The care economy

Albania has high informal care responsibilities concentrated on women, and limited public childcare infrastructure (kindergarten enrolment of children aged 3–5 is below the EU average and varies sharply between urban and rural areas). This pattern affects copyright industries through two channels. First, the project-based and freelance work patterns common in the music, audiovisual, design, and visual-arts sub-sectors place a premium on schedule flexibility, which in practice often translates into longer or more unpredictable hours that are harder to combine with caregiving, this is one reason why women are concentrated in the more institutionalised parts of the creative sector (broadcasting, libraries, museums) where regular hours are more compatible with care work. Second, the rapid expansion of the IT sub-sector since 2020 has been accompanied by widespread adoption of remote and hybrid work practices, which on balance is a positive development for caregivers but does not by itself overcome the underlying skills-supply barrier identified at the training stage.

7.4.4 Informality and the gig economy

A meaningful share of creative work in Albania is performed informally or through short project contracts that do not appear in INSTAT's Structural Business Survey. The Chapter 5 figures rely on SBS data and therefore systematically under-count freelance musicians, performing artists, journalists, photographers, designers, and translators who work outside the formal employer-employee model. Available European evidence (notably the EU Voices of Culture 2021 synthesis on gender balance in the cultural and creative sectors and UNESCO's 2021 outlook on the cultural and creative industries during COVID-19) suggests that women in creative industries are disproportionately represented in informal, freelance and short-term contractual work, where pay and social protection are systematically lower than in formal employment²⁹. Direct Albanian evidence on this point is not available; if the European pattern holds in Albania, the women's share of total copyright-related work, including informal, is likely higher than what the formal-sector statistics in this chapter show, but the corresponding income and protection levels are systematically lower. The chapter cannot quantify this effect without a dedicated cultural-and-creative-work survey, the case for which is set out in Chapter 9.

7.5 Policy Recommendations for Gender and Inclusion

The recommendations below mirror the three-tier structure used in Chapter 9. They

²⁹ EU Voices of Culture (2021), Gender Equality: Gender Balance in the Cultural and Creative Sectors, Brainstorming Report, structured dialogue with the European Commission, Brussels. UNESCO (2021), Cultural and Creative Industries in the Face of COVID-19: An Economic Impact Outlook, Paris. See also OECD

(2022), The Culture Fix: Creative People, Places and Industries (Local Economic and Employment Development series), and ILO (2018), Women and Men in the Informal Economy: A Statistical Picture, 3rd ed., Geneva, for the broader pattern of women's over-representation in informal employment economy-wide.

focus on what is implementable within the existing institutional architecture (Tier 1), what requires modest legal or institutional reform (Tier 2), and what would constitute structural change (Tier 3). The single most important recommendation, restated from Chapter 9 and made specific here, concerns the resumption and extension by INSTAT of sex-disaggregated tabulations for copyright-relevant NACE codes, without this, none of the other recommendations can be evidence-based or monitored over time.

Tier 1 - Immediate (2025–2026)

- i) INSTAT to resume the "Punësimi në Kulturë" employment-by-sex series in the 2025 Culture Statistics release and extend it to NACE 1-digit J, M and R sex-disaggregated employment, using LFS quarterly data already collected. The marginal cost is low because the underlying microdata already records sex; the constraint is publication policy, not measurement.
- ii) The MTCS Copyright Directorate, working with the four CMOs (ALBAUTOR, AKDIE, FABER, FAAD) and SUADA, to begin recording sex of rights-holder in royalty distribution data from 2026 onward. This is a lightweight administrative change that immediately produces a longitudinal dataset on women authors, performers, and producers receiving royalties, currently absent from any Albanian source.
- iii) Producer associations and the leading sector federations (chambers of

commerce, IT and creative-industry associations) to include sex-disaggregated questions in their annual member surveys, with publication of aggregate results.

Tier 2 - Medium-term (2026–2027)

- i) INSTAT to provide research access to the Labour Force Survey microdata for 2024 onward under Article 27 of Law 17/2018 ("Aksesi për qëllime kërkimore shkencore"), enabling the construction of sex × NACE 2-digit × ISCO crosstabs for copyright-relevant codes, without which a proper Albanian gender pay gap measurement inside copyright sectors remains impossible.
- ii) Targeted scholarships and re-skilling programs for women into ICT and Technology study tracks, addressing the 13.2 per cent women's share of ICT graduates that constrains the pipeline into the highest-paid copyright-relevant sub-sector. Funding sources could include the EU IPA III instrument and bilateral programs already committed to digital-skills development.
- iii) A dedicated cultural-and-creative-work survey, jointly commissioned by MTCS and the Ministry of Finance, designed to quantify informal and project-based creative work, explicitly including the sex of workers and the income and protection levels associated with this work. The Chapter 5 baseline and the Chapter 7 gender analysis both depend on this survey for their next iteration.

Tier 3 – Structural and longer-term (2027 onward)

- (i) Mainstreaming of sex-disaggregation in the data architecture of all copyright-relevant administrative records, INSTAT national accounts, SBS, LFS, customs trade in copyright goods, BoA balance of payments services, MTCS copyright registrations, and CMO royalty distributions, through a single MTCS-coordinated requirement linked to the planned National Copyright Industries Strategy. The intent is to make the absence of sex-disaggregated data the exception rather than (as today) the default.
- (ii) Gender-responsive procurement criteria in public commissioning of creative content (national broadcaster, public film and theatre funding, public-sector communications, design and architectural services), requiring funded productions to track and report sex of rights-holder.
- (iii) Establishment of a permanent Gender and Inclusion Observatory for the creative and copyright industries, hosted within INSTAT or jointly with MTCS, with the explicit mandate of producing biennial reports on women's participation, pay, and rights-holder revenues across the copyright economy. The Observatory would absorb the data-collection recommendations above and replace the current ad-hoc, study-by-study approach with a routine monitoring function.

Chapter 8: International Benchmarking



8.1 Purpose and Scope of the Benchmarking Exercise

Benchmarking Albania's copyright and related rights-based industries against comparable international studies serves two complementary objectives. First, it situates Albania's results within a regional and global frame of reference, allowing policymakers and rights-holder organisations to interpret performance relative to peers. Second, it tests the robustness of the Albanian estimates by verifying that the magnitudes, sectoral patterns, and growth trajectories observed in Chapters 5 through 7 fall within internationally plausible ranges.

The present chapter draws on seven external studies conducted under the WIPO Guide on Surveying the Economic Contribution of the Copyright-Based Industries (2015 edition): (i) the Kosovo study covering 2017–2019, conducted under the EU IPR Support Programme in cooperation with WIPO; (ii) the Serbian study covering 2008–2012, conducted by FREN (Foundation for the Advancement of Economics); (iii) the Netherlands study covering 2019 and 2022, prepared by SEO Amsterdam Economics and IViR for the Dutch Ministry of Economic Affairs; (iv) the Croatian study covering 2002–2004, conducted under the Croatian Bureau of Statistics; (v) the Bulgarian study covering data up to 2005, conducted in cooperation with the National Statistical Institute; (vi) the Romanian study covering 2002–2005, using Ministry of Public Finance and customs data; and (vii) the Singaporean study covering 2001, conducted for WIPO using a mixed-method approach combining official statistics, enterprise surveys, and input-output analysis.

Albania's reference figures in this chapter are drawn from Chapters 5 through 7 of this study. Where full INSTAT sectoral GVA disaggregation was not yet available at the time of writing, estimates are clearly marked as such and are based on employment-weighted or CAC-weighted imputations documented in the Calculation Workbooks. All comparator data are drawn from published WIPO studies with their original reference years clearly indicated. Because data coverage spans from 2001 (Singapore) to 2024 (Albania), direct ranking comparisons carry methodological caveats that are addressed in Section 8.9.

An important innovation in this revised chapter is the addition of a methodological benchmarking dimension. Rather than comparing only headline results, Section 8.3 systematically maps how each comparator handles industry classification granularity, copyright attribution factors, treatment of non-dedicated industries, and data-gap mitigation. This is consistent with WIPO's own emphasis that cross-country comparability depends as much on documenting methodological choices as on publishing a single GDP share.

8.2 Comparator Country Profiles

8.2.1 Kosovo (Study Period: 2017–2019)

The Kosovo copyright study is the most directly comparable to the Albanian exercise in terms of methodology, regional context, and economic structure. Kosovo's economy in the study period was characterised by a large services sector, a dominant diaspora-driven remittance inflow, and a growing but still modest IT services industry. The study found that copyright-based industries (CBIs) contributed 2.35% of GDP, with total CBI

employment reaching 18,920 people (5.21% of total employment).

The Core CBI category dominated, accounting for 1.85% of GVA (EUR 105.8 million) and 15,219 jobs (80.4% of total CBI employment). Within the Core, Press and Literature was the largest subsector at 27.1% of Core GVA, followed by Software and Databases at 20.7% and Advertising and Market Research at 17.6%. The CBI CAGR over 2017–2019 was 3.7%, below the national GDP CAGR of 4.4%, indicating that the sector had not yet established the faster growth trajectory that would increase its share of the economy.

Methodologically, Kosovo's study is notable for its use of NACE 4-digit consolidation in its workflow, explicit attribution factors for "common activities" to avoid double counting across copyright groups, and detailed CN→NACE concordance mapping for trade data. These practices set a useful reference point for Albania's own methodological development.

8.2.2 Serbia (Study Period: 2008–2012)

The Serbian WIPO study, conducted by FREN and covering the period from the global financial crisis through to early recovery, represents a more structurally developed CBI ecosystem. Serbia's CBIs contributed 4.61% of GVA and 4.00% of GDP at the end of the study period (2012), with approximately 90,503 people employed in copyright industries (4.06% of total employment).

The Core CBI in Serbia accounted for 3.10% of GVA, significantly larger than Kosovo's 1.85%, with the Press and Literature subsector contributing 1.20% of GVA and Software and Databases 0.90%. Labour productivity data showed that CBI workers

averaged higher output per head than the national average, a pattern that is consistent with the skill-intensive nature of creative industries. Serbia's study is also notable for its careful distinction between GDP and GVA shares, documenting the wedge introduced by non-attributable taxes and VAT.

8.2.3 Netherlands (Study Period: 2019 and 2022)

The Netherlands study provides an upper-bound reference for a mature, high-income EU digital economy. With a total CBI contribution of 6.0% of GDP (EUR 59,996 million) in 2022, the Netherlands exceeded both the WIPO global average of 4.9% and was close to the OECD average of 6.2%, reflecting a deep and diversified creative economy that spans technology, media, design, and publishing.

The Core CBI was dominated by Software and Databases (64.8% of Core GVA), reflecting the Netherlands' position as a European technology hub. Press and Literature accounted for 13.8%, Advertising for 8.1%. Employment reached 623,900 FTE (8.1% of total FTE), equivalent to about 757,000 jobs. The study is particularly valuable as a methodological benchmark because it presents explicit robustness checks: under alternative factor and sector assumptions, the GDP share ranges from 5.2% to 7.1%, demonstrating the sensitivity of results to classification and attribution decisions.

8.2.4 Croatia (Study Period: 2002–2004)

The Croatian WIPO study covers a period when Croatia was preparing for EU accession, a context directly relevant to

Albania's current trajectory. Total copyright industries contributed 4.44% of GDP in 2002 and 4.3% in 2004, with employment at 4.23% (2002) and 4.65% (2004) of total employment. The study reports both goods and services trade data using BoP methodology.

Croatia's study is particularly instructive because it explicitly links its analysis to "grey economy" exhaustiveness work in the national accounts context. For Albania, where informality remains a significant factor in economic measurement, Croatia's approach to acknowledging and partially adjusting for unobserved economic activity provides a useful methodological precedent.

8.2.5 Bulgaria (Study Period: up to 2005)

Bulgaria's WIPO study found that total copyright-based industries contributed 2.81% of GDP, with the Core category accounting for 1.57%. Employment in copyright industries totalled approximately 104,814 people. The study was conducted using a Bulgarian NACE variant (NKID) at a relatively detailed coding level.

The Bulgarian experience is particularly relevant to Albania because it directly confronts the problem of "mixed codes", NACE categories where copyright-relevant and non-relevant activities are bundled together. The study recommends revising national NACE coding practice to separate these activities, a recommendation that applies equally to Albania's current 2-digit NACE constraint. Bulgaria's relatively low GDP share (2.81%) at a similar development stage provides a useful lower-bound regional benchmark.

8.2.6 Romania (Study Period: 2002–2005)

Romania's WIPO study showed a notably rising trend in copyright industry contribution: from 3.75% of GDP in 2002 to 5.55% in 2005. Employment in copyright industries represented 2.36% of the total working population in 2005. The study used CANE (a NACE-like classification) with conversion tables and drew on Ministry of Public Finance data and customs records.

Two features of the Romanian study are relevant for Albania's benchmarking. First, it demonstrates how copyright industries can grow their GDP share rapidly during a period of economic transition, a pattern that Albania appears to be replicating. Second, Romania reports a non-dedicated impact factor of approximately 0.01, which is substantially lower than Albania's WIPO-derived factor (3.07–4.31% over 2020–2024), highlighting the sensitivity of this component to economic structure and methodology.

A note on temporal comparability: several comparator figures (Bulgaria 2005, Romania 2005, Serbia 2012) are 15–20 years old and reflect economies that have since undergone substantial structural change. In particular, the universal growth of the software and IT sector since 2012 means these older studies almost certainly understate the weight of computer programming and related services in the copyright economy. Readers should interpret cross-country comparisons involving pre-2015 studies with this directional bias in mind.

8.2.7 Singapore (Study Period: 2001)

Singapore's early WIPO study found that copyright industries contributed 5.7% of GDP and 5.8% of total employment. The study identified 29 copyright-related

industries and is notable for its mixed-method approach combining official statistical data with enterprise surveys and in-depth interviews, as well as its use of input-output multiplier analysis.

Singapore's methodological contribution is particularly relevant: the study explicitly documents the completeness-versus-reliability tradeoff in copyright factor derivation, using a conservative estimation strategy for uncertain categories. This approach, erring on the side of underestimation where direct measurement is not possible, provides a model for how

Albania could refine its own copyright attribution coefficients in future iterations.

8.3 Methodological Benchmarking Against International Practice

A strengthened benchmarking exercise must compare not only headline results but also the methodological approaches used to generate them. The following table provides a structured comparison of Albania's methodology against its seven comparator countries across six key dimensions drawn from the WIPO Guide and national implementation practice.

Table 8.1: Methodological Comparison Across WIPO Comparator Studies

Dimension	Albania (2024)	Kosovo (2019)	Serbia (2012)	Netherlands (2022)	Croatia (2004)	Bulgaria (2005)	Romania (2005)	Singapore (2001)
Industry coding	NACE 2-digit only	NACE 4-digit consolidation	Detailed industry / group reporting	Microdata-based (sub-2-digit)	NCA / ESA context	NKID at detailed level; mixed codes flagged	CANE + conversion tables	29 industries identified
Primary data sources	INSTAT national accounts; BoA BoP; LFS	KAS; customs; central bank	Official stats + interviews	CBS microdata; SEO studies	CBS and national systems	NSI; central bank	Ministry of Finance; customs	DOS, EDB; surveys + interviews
Copyright factors	Single CAC per 2-digit NACE; no enterprise survey	Attribution factors for common activities; overlap control	GDP vs GVA wedge documented	Explicit factors; alt. sets tested	Non-ded. factor varies with Cat I-III	Mixed-code grouping; NACE revision recommended	Non-ded. factor ~0.01	Conservative factors; survey-based for partials
Robustness checks	Sensitivity on CAC and non-ded. factor	Not reported in available excerpts	Not reported in available excerpts	GDP range 5.2–7.1% under alt. assumptions	Not reported in available excerpts	Not reported in available excerpts	Not reported in available excerpts	Explicit tradeoff documentation
Trade coverage	BPM6 services (BoA);	Goods + services via BoP	Goods only (services)	Goods + services via BoP	Goods + services via BoP	Not specified in detail	Exports/imports with classification	Foreign trade included

Dimension	Albania (2024)	Kosovo (2019)	Serbia (2012)	Netherlands (2022)	Croatia (2004)	Bulgaria (2005)	Romania (2005)	Singapore (2001)
	customs goods		excluded due to data limits)				on mapping	
Indicators reported	GDP/GVA share, employment, trade, I-O multipliers	GDP/BPV, employment, export/import shares	GDP, GVA, employment, trade	GDP, employment (FTE), goods trade	GDP, employment, trade	GDP, GVA, employment, growth	GDP, employment, trade	GDP, employment, trade, multipliers

Sources: WIPO Guide (2015); Kosovo EU IPR Study (2021); Serbia FREN/WIPO (2014); Netherlands SEO (2025); Croatia CBS/WIPO; Bulgaria NSI/WIPO; Romania MoPF/WIPO; Singapore DOS/WIPO.

The methodological comparison reveals several important patterns.

- First, Albania is the only country in the comparator set that relies exclusively on 2-digit NACE coding, all others use more granular classification or explicit concordance mechanisms.
- Second, only the Netherlands and Singapore conduct formal robustness checks with alternative factor sets, although Albania's study does include CAC and non-dedicated factor sensitivity analysis.
- Third, the treatment of trade data varies substantially: the Netherlands notably excludes services trade due to attribution difficulties, whereas Albania includes BPM6 services data from the Bank of Albania. These

differences must be kept in mind when interpreting the comparative tables that follow.

A further comparability consideration concerns the non-dedicated (ND) factor methodology. This study uses the WIPO-derived ND factor, which is algebraically endogenous and converges to the final CBI/GDP ratio by construction, making it an upper bound. Earlier WIPO country studies, including Serbia 2012, used a flat 0.02 ND factor. The WIPO-derived factor is methodologically superior, but readers should note that this difference affects cross-country comparisons: **Albania's headline CBI/GDP figure is not directly comparable to studies using the flat 0.02 factor, as the latter would produce a lower estimate for Albania.**

8.4 Comparison of GVA/GDP Contribution

Table 8.2: CBI Contribution to GVA/GDP by Category – Comparative Overview

Category	Kosovo (2019)	Serbia (2012)	Netherlands (2022)	Croatia (2004)	Bulgaria (2005)	Romania (2005)	Singapore (2001)	Albania (2024e)
	% of GDP	% of GDP	% of GDP	% of GDP	% of GDP	% of GDP	% of GDP	% of GDP
Core CBI	1.49%	2.69%	4.6%	n/a	1.57%	n/a	n/a	-3.34%
Interdependent CBI	0.22%	0.50%	0.4%	n/a	n/a	n/a	n/a	-0.13%
Partial CBI	0.18%	0.19%	0.4%	n/a	n/a	n/a	n/a	-0.22%
Non-dedicated Support	0.47%	0.62%	0.6%	n/a	n/a	n/a	n/a	-0.63%
TOTAL CBI	2.35%	4.00%	6.00%	4.30%	2.81%	5.55%	5.70%	-4.31%
Absolute CBI (local)	EUR 165m	n/a	EUR 59,996m	n/a	n/a	n/a	n/a	
Study reference year	2019	2012	2022	2004	2005	2005	2001	2023

Sources: Kosovo EU IPR Study (2021); Serbia FREN/WIPO (2014); Netherlands SEO (2025); Croatia CBS/WIPO; Bulgaria NSI/WIPO; Romania MoPF/WIPO; Singapore DOS/WIPO. 'n/a' = category breakdown not available in published study excerpts. Note: Kosovo and Serbia values are converted from the % of GVA reported in their studies to % of GDP (using each study's GVA/GDP ratio) for comparability with the other countries and Albania.

Table 8.2 reveals a clear development-stage pattern across the expanded comparator set. The total CBI/GDP share ranges from Bulgaria's 2.81% (2005) at the lower end to the Netherlands' 6.0% (2022) at the upper end, with Singapore (5.7%, 2001) and Romania (5.55%, 2005) also above the WIPO global average of 4.9%. Albania's estimated 4.31% (2023) places it in the mid-range of the comparator set, above both Kosovo (2.35% of GDP) and Bulgaria (2.81%), and close to Serbia's 4.00%. Croatia's 4.3% (2004) during its pre-EU accession period suggests that Albania's CBI share could continue to increase as the economy integrates further with the EU.

The composition of the Core CBI reflects development trajectories. In Kosovo and

Serbia, Press and Literature remained the largest single Core subsector. In the Netherlands, Software and Databases represents nearly two-thirds of the Core. Albania's estimated Core CBI composition, with Software and Databases at approximately 35% of Core GVA, represents a structural resemblance to the Netherlands rather than to its immediate regional peers.

Romania's rapid increase from 3.75% (2002) to 5.55% (2005) is particularly instructive: it demonstrates that copyright industries can grow their GDP share substantially during economic transition, a pattern that Albania appears to be replicating through the expansion of its IT services sector.

8.5 Employment in Copyright-Based Industries

Table 8.3: CBI Employment – Comparative Overview

Indicator	Kosovo (2019)	Serbia (2012)	Netherlands (2022)	Croatia (2004)	Bulgaria (2005)	Romania (2005)	Singapore (2001)	Albania (2023)
Total CBI employment	18,920	90,503	623,900 FTE	n/a	104,814	n/a	n/a	40,535 (2023)
CBI employment share	5.21%	4.06%	8.10% (FTE)	4.65%	n/a	2.36%	5.80%	3.38%
Core CBI share of total CBI emp.	80.4%	n/a	n/a	n/a	n/a	n/a	n/a	73.3%
Measurement basis	Headcount	Headcount	FTE	Headcount	Headcount	Working pop.	Headcount	LFS headcount
Study reference year	2019	2012	2022	2004	2005	2005	2001	2023

Sources: As Table 8.2. 'n/a' = not available in published study excerpts. Employment measurement bases differ across studies.

Employment benchmarking is complicated by differences in measurement conventions across studies. Kosovo and Serbia report headcounts; the Netherlands reports FTE; Romania uses “working population”; Albania uses LFS-derived headcounts. These definitional differences mean that the employment shares are not directly comparable in strict statistical terms, though they provide useful order-of-magnitude context.

Albania’s CBI employment share of 3.38% is below Kosovo’s 5.21%, Serbia’s 4.06%, and the Netherlands’ 8.1%, though above Romania’s 2.36%. This might reflect the capital and skill intensity of the dominant software sector, a pattern of high GVA per worker but relatively fewer total jobs. Romania’s low employment share (2.36%) despite a high GDP share (5.55%) suggests a similar structural pattern, providing partial validation of Albania’s estimates.

In relative terms, Kosovo’s CBI employment share (5.21%) is the highest of the group aside from the Netherlands, which may

appear paradoxical given its lower GVA share. This reflects a structural feature common to early-stage creative economies: a large number of small, informally organised creative enterprises generating employment but with relatively low value added per worker.

An analytical note on the relationship between GVA and employment shares. In most industrialised economies, the GVA share of copyright industries tends to be smaller than the employment share. This pattern reflects the Baumol cost-disease effect: copyright industries are dominated by labour-intensive services and public-facing creative activities (theatre, music, libraries, education, broadcasting) where productivity grows more slowly than in capital-intensive sectors. The WIPO global average is consistent with this pattern (4.9% GVA share vs. 5.78% employment share, i.e. a GVA-to-employment ratio of 0.85). Albania, however, displays the inverse pattern: a 4.31% GVA share against a 3.38% employment share, a ratio of 1.30.

Serbia (4.00% / 4.06%) shows a similar pattern. This anomaly is structural and is driven primarily by the high productivity per worker in the dominant software sub-sector, which in turn reflects the export of developer-hours to higher-income clients. The Albanian developer who would generate (say) EUR 25,000 of annual GVA when working for a domestic firm generates EUR 60,000–100,000 when contracted to a foreign client, a labour-

arbitrage premium that mechanically inflates the GVA-per-worker ratio without a corresponding increase in domestic value capture. Policymakers should treat this asymmetry not as a sign of structural strength but as evidence that current value flows can shift rapidly if global IT outsourcing demand contracts (see also the AI-related structural risk discussed in Section 6.3).

8.6 Trade in Copyright Goods and Services

Table 8.4: Trade in Copyright Goods and Services – Comparative Overview

Trade Indicator	Kosovo (2019)	Serbia (2012)	Netherlands (2022)	Albania (2024)
Exports (EUR m)	173.0	778.7	n/a	-151
Imports (EUR m)	254.4	1,323.5	n/a	-131
Net Balance (EUR m)	-81.5	-544.8	-4,700	+19.5
Copyright export share	8.40%	n/a	n/a	-3.5% ^e
Trade coverage	Goods + services	Goods + services	Goods only	BPM6 services + customs goods
Study reference year	2019	2012	2022	2024

Sources: Kosovo EU IPR Study (2021); Serbia FREN/WIPO (2014); Netherlands SEO (2025). Albania estimates from Chapter 6.

The trade comparison reveals Albania's most distinctive structural characteristic relative to its peers. Both Kosovo and Serbia show net deficits in copyright-related trade when considered in full (Serbia's deficit of EUR 545 million reflects substantial IP licensing imports). The Netherlands is also a net importer of copyright goods, although its services trade is not included in the study.

Albania, by contrast, shows an estimated trade surplus of approximately EUR +63 million in attributed copyright-related services in 2024, driven primarily by computer services exports (EUR 206 million raw, EUR 103 million attributed at the 0.50 copyright attribution factor). This

structural surplus is unique among the Western Balkan comparators and reflects Albania's emerging position as an IT services outsourcing destination.

An important methodological caveat applies to the trade surplus comparison with the Netherlands. The Netherlands 2022 study notably excludes services trade from its copyright trade balance on the grounds that attribution is inherently uncertain for BPM6 service categories. Albania's inclusion of BPM6 services data, which drives the positive trade balance, means the two studies are not strictly comparable on this dimension. If the Netherlands methodology were applied to Albania's trade data (i.e., excluding

services), Albania would show a trade deficit driven by the IP royalties deficit, rather than the surplus highlighted as a distinctive structural characteristic. The services-inclusive approach adopted in this study is nevertheless defensible and consistent with the methodology used by Kosovo and Serbia, but readers should exercise caution when interpreting the trade surplus comparison with the Netherlands.

An important caveat noted from the Netherlands study applies here: services trade attribution is inherently more uncertain than goods trade because service categories in BPM6 do not map one-to-one to copyright industries. The Netherlands explicitly excludes services trade from its copyright trade balance for this reason. Albania's inclusion of BPM6 services data, while defensible, means that the trade figures are subject to greater attribution uncertainty than the GVA estimates.

8.7 Core CBI Sector Breakdown Comparison

Table 8.5: Core CBI Sector Composition – Comparative Overview

Core CBI Sector	Kosovo 2019 (% Core GVA)	Serbia 2012 (% total GVA)	Netherlands 2022 (% Core GVA)	Albania 2024e (% Core GVA)
Press & Literature / Publishing	27.1%	26.0%	13.8%	15%
Software & Databases / IT	20.7%	19.6%	64.8%	35%
Advertising & Market Research	17.6%	7.1%	8.1%	7%
Music, Theatre & Opera	5.0%	2.3%	1.9%	2%
Film, Video & Photography	3.5%	4.4%	3.38%	5%
Radio & Television	14.9%	11.7%	4.9%	10%
Visual & Graphic Arts	1.2%	2.2%	1.0%	1%
Other Core	10.0%	n/a	2.7%	10%

Sources: Kosovo EU IPR Study (2021); Serbia FREN/WIPO (2014); Netherlands SEO (2025). Albania estimates from Chapter 5.

The sectoral composition of the Core CBI across the comparator countries reflects different technological and cultural endowments, as well as the timing of each study. The dominance of Software and

Databases in the Netherlands (64.8%) and in Albania's estimates (~35%) stands in contrast to Kosovo and Serbia, where Press and Literature still holds the largest share.

8.8 Albania in the WIPO Global Ranking Context

Table 8.6: WIPO Global Benchmark Reference Points

Benchmark / Reference Point	Value	Source
WIPO global average CBI/GDP (2015 Guide)	4.9%	WIPO (2015)
OECD average (Netherlands 2022 study)	6.2%	SEO/WIPO (2025)
Developed economies average	-7.4%	WIPO synthesis (2021)
Emerging economies average	-5.1%	WIPO synthesis (2021)
Transition economies average	-5.0%	WIPO synthesis (2021)
Developing economies average	-3.5%	WIPO synthesis (2021)
WIPO average employment share	5.78%	WIPO synthesis (2021)
Albania estimated CBI/GDP (2024)	4.31%	This study
Albania estimated CBI employment (2023)	3.38%	This study

Sources: WIPO Guide (2015); WIPO cross-country synthesis (2021); Netherlands SEO (2025); this study.

At an estimated 4.31% of GDP, Albania is positioned below the WIPO global average of 4.9% but above the developing-economy average of -3.5% and within reach of the transition-economy average of -5.0%. The employment share (3.38%) is below the WIPO average of 5.78%, consistent with the capital-intensive nature of Albania's dominant IT services sector.

Serbia, at 4.00% of GDP (2012), ranked 34th of 40 countries in the WIPO global ranking at the time of its study. Albania's 4.31%, while lower in absolute terms, is measured in a more recent year with a faster growth trajectory. Direct ranking comparisons carry methodological caveats: reference years differ across studies, copyright attribution factors are not standardised internationally, and the application of the WIPO non-dedicated factor formula produces materially different results depending on economic structure.

8.9 Methodological Limitations: The 2-Digit NACE Constraint

Albania's current study relies on NACE 2-digit sectoral data from INSTAT, which is materially coarser than the classification granularity used by most comparators. Kosovo explicitly consolidates data at NACE 4-digit level; Bulgaria applies its national NKID at detailed code level; the Netherlands uses microdata below published aggregation levels. Albania is the only country in the comparator set that works exclusively at the 2-digit level.

This constraint introduces four identifiable error channels that should be acknowledged when interpreting the results:

Aggregation error. A 2-digit NACE code can contain both highly copyright-intensive 4-digit activities and weakly related activities. If a single copyright attribution coefficient is applied to the full 2-digit aggregate, the estimate may diverge from the "true" contribution that would be measured with finer granularity.

Misclassification risk. Activities that are copyright-intensive at the 4-digit level may

be bundled with non-copyright-intensive activities under the same 2-digit heading, leading to either over- or under-attribution depending on the applied coefficient.

Bias direction ambiguity. The net direction of these errors is not determinable a priori. If highly copyright-intensive sub-activities are a small share of a 2-digit group, applying a full copyright factor to the aggregate overstates the contribution. Conversely, if a 2-digit group is coded as “non-copyright” but contains meaningful copyright sub-activities, the contribution is understated. Kosovo’s use of explicit “common activities” attribution factors helps mitigate this problem; without 4-digit data, Albania cannot replicate this approach.

Overlap risk. With 2-digit aggregates, the risk of double-counting activities that span

multiple WIPO categories increases, because the boundaries between categories are less precise at the 2-digit level.

These limitations do not invalidate Albania’s estimates, but they do mean that the headline figures carry a wider implicit uncertainty band than those of comparators with finer classification data. The sensitivity analysis in the Calculation Workbooks (Chapter 5) partially addresses this by testing alternative CAC values, but a full quantification of 2-digit aggregation uncertainty would require access to NACE 4-digit business register or LFS microdata from INSTAT.

9.1 Summary of Quantitative Findings

The quantitative analysis, drawing on INSTAT national accounts, the Structural Business Survey, and Bank of Albania balance of payments data for 2020–2024, yields the following headline findings:

GDP contribution. All copyright industries contributed an estimated 4.31% of GDP in 2024, equivalent to ALL 108.6 billion (approximately EUR 1,048 million). The total rose from 3.80% (2020) to a peak of 4.54% (2023), with a marginal moderation to 4.31% in 2024. Core copyright industries (Category I) accounted for 3.34% of GDP, driven primarily by IT and software (NACE 62–63), which alone represented 34.9% of Core CBI GVA.

Employment. Total attributed copyright industry employment reached 40,535 people in 2023 (3.38% of the national workforce; latest LFS data available), up from 29,398 people in 2020 (2.50%). Employment growth of 38% significantly outpaced the national labour market. The software sector (NACE 62) accounted for the largest share, with employment nearly doubling from 5,938 to 11,705 people over the period.

Foreign trade. Albania's copyright services trade reversed from a deficit of EUR –29.7 million (2014) to a attributed surplus of EUR +63.4 million (2024), driven by computer services exports (BPM6 BJ200), which grew from EUR 9.5 million to EUR 206.1 million over the decade (CAGR 36%). Software now represents 70.2% of all copyright service exports (after 0.50 copyright attribution factor). A structural IP royalties deficit of EUR –23.9 million (2024) persists, reflecting dependence on

foreign software platforms and media content licensing.

International benchmarking. Albania's estimated 4.31% GDP share positions it below the WIPO global average (4.9%). Albania is showing a positive copyright services trade balance, reflecting the structural importance of its software export sector. The Core CBI composition, with software at approximately 35%, resembles the Netherlands more than Kosovo or Serbia, where publishing remains dominant.

Trend direction. All indicators point to a structurally positive trajectory. Total copyright GVA grew 72.4% in nominal terms over 2020–2024, outpacing overall GDP growth. The software sector's GVA more than doubled. The copyright industry employment grew at roughly eight times the national rate. The trade surplus widened by more than EUR 60 million in a decade.

Legal and institutional readiness. Albania's copyright framework, established by Law No. 35/2016 on Copyright and Related Rights, has been substantially strengthened through the amendments adopted by Parliament on 10 July 2026³⁰, further advancing alignment with the EU copyright acquis, including key elements of the Digital Single Market (DSM) Directive, the Online Transmissions and Retransmissions (SatCab II) Directive, and the Collective Rights Management (CRM) Directive. The institutional architecture, led by the Directorate General of Copyright (DPDA) within the Ministry responsible for copyright policy and supported by SUADA, the National Copyright Council, the State Inspectorate for Market

³⁰ See footnote 2 above, regarding the publication status of the July 2026 amendments.

Surveillance (SIMS), the Audiovisual Media Authority (AMA), the Authority for Electronic and Postal Communications (AKEP), Customs Administration and the State Police, provides the institutional framework for copyright administration and enforcement. Continued implementation of the July 2026 reform³¹ will depend on strengthening institutional capacity, secondary legislation and effective enforcement. The principal gaps are in enforcement capacity and the private copying levy system: actual SUADA levy collections in 2024 amounted to just EUR 15,100 against a theoretical yield in the range of EUR 0.8–1.4 million (a collection rate of 1.1–1.9%), indicating that the levy infrastructure remains largely non-operational.

9.2 Summary of Qualitative Findings

The qualitative analysis, drawing on desk research, institutional mapping, and the legal and regulatory review in Chapter 2, identifies several structural features of Albania's copyright ecosystem that contextualise and complement the quantitative findings.

Legal and institutional readiness. While the legislative framework has been substantially strengthened, its practical impact will depend on effective implementation through secondary legislation, strengthened institutional capacity, enhanced digital copyright enforcement, transparent and efficient collective rights management, and consistent administrative and judicial practice capable of supporting the

sustainable development of Albania's copyright-based industries. However, enforcement capacity remains constrained by limited staffing and the absence of specialised IP courts.

Collective management and revenue collection. The SUADA One-Stop Shop model represents a meaningful institutional advance, but total collective management revenue of ALL 42.5 million (EUR 410,000) in 2024 is exceptionally low for a country of 2.8 million people. The revenue base is highly concentrated at the sector level: audiovisual media service providers (OSHMA – the broadcasting sector as a whole, covering RTSH and all licensed private broadcasters) account for 73% of all collections, while the long tail of commercial users (hotels, restaurants, retail, fitness centres) together contribute only about 23%. The private copying levy system, despite covering an upper-bound import base of EUR 274 million in 2025 (effective taxable base –EUR 160–180 million after DCM 465/2023 percentage reductions), achieves a collection rate of only 1.1–1.9%, indicating a systemic gap between the legal framework and operational implementation. These figures suggest that copyright creators in Albania are receiving far less remuneration than their counterparts in comparator countries.

In-depth stakeholder consultations conducted for this study (ALBAUTOR, January 2026; SUADA, February 2026; CMO profiles) confirm and deepen these findings. The collective management system operates with a combined staff of fewer than 10 people across all four CMOs and SUADA, down from approximately 15 at SUADA alone in 2019. Enforcement depends on approximately 10 SIMS

³¹ See footnote 2 above, regarding the publication status of the July 2026 amendments.

inspectors covering 36,000 potential users, resulting in only 230–300 inspections annually. The public broadcaster RTSH does not fulfil its legal obligation to allocate 1% of its budget to SUADA. Trust in the system is low among both creators and users: CMOs are perceived as lacking transparency in revenue distribution, while users face unclear obligations. Several sectors; visual arts, books, galleries, remain entirely outside effective collective management. These operational realities explain why total collection (EUR 410,000) is a fraction of what comparable systems produce in peer economies.

IP ownership and value capture. A critical structural observation is that Albania's dominant copyright export sector, computer services, operates primarily through staff augmentation and outsourced development models, where foreign clients retain intellectual property ownership. While this generates significant GVA and employment, the long-term royalty stream and IP asset value accrue abroad. Albania's structural IP royalty deficit (EUR 29.7 million in payments vs. EUR 5.9 million in receipts in 2024) quantifies this imbalance. Transitioning from service provision to proprietary product development would fundamentally change Albania's position in the global copyright value chain.

EU accession context. Copyright alignment under Chapter 7 of the *acquis* is both a legal requirement and an economic opportunity. The comparative analysis in Chapter 8 shows that Croatia and Romania experienced growth in their copyright industry GDP share during the pre-accession and early accession period, suggesting that the regulatory harmonisation process itself can stimulate

creative sector development. Albania's current trajectory is consistent with this pattern.

9.3 Policy Recommendations

Based on the quantitative and qualitative findings of this study, the following recommendations are organised by priority tier and by responsible institution.

Tier 1: Immediate Actions (2025–2026)

1. The Ministry responsible for copyright policy should prioritise the timely implementation of the amendments to Law No. 35/2016 adopted by Parliament on 10 July 2026³² through the adoption of the necessary secondary legislation, operational guidance, institutional strengthening, and coordinated implementation across the copyright ecosystem. Particular attention should be given to the effective application of the new provisions governing digital copyright, collective rights management, online licensing, and copyright enforcement in the digital environment, thereby supporting both Albania's continued approximation with the EU copyright *acquis* and the development of a modern digital creative economy. [Lead: Ministry responsible for copyright policy / Directorate General of Copyright (DPDA)] [Lead: MTCS / Copyright Directorate]

2. Address the private copying levy collection gap. SUADA and the Customs Administration should establish systematic data-sharing to identify non-compliant importers among the 2,875 companies importing levy-eligible devices. The current 1.1–1.9% collection rate against an upper-bound import base of EUR 274 million

³² See footnote 2 above, regarding the publication status of the July 2026 amendments.

(effective taxable base -EUR 160–180 million after DCM 465/2023 percentage reductions) represents approximately EUR 0.8–1.4 million in foregone annual revenue for creators. As an immediate priority, the operational list of HS tariff codes notified by the Directorate General of Customs to SUADA under Article 9 of DCM 465/2023

should be obtained and published, and an operational review of the collection mechanism, including automated customs-to-SUADA notification protocols, should be completed within six months. [Lead: SUADA / General Directorate of Customs]

3. Commission INSTAT to produce NACE 4-digit tabulations for copyright-relevant sectors. Albania's reliance on 2-digit NACE data is the study's single most significant methodological limitation relative to international practice. INSTAT should be requested to provide business register and LFS tabulations at the 4-digit level for NACE codes 58–63, 73, 90–93, and key partial-industry codes. This would enable a "NACE bridge" approach that substantially reduces classification uncertainty. [Lead: INSTAT / Ministry of Finance]

Tier 2: Medium-Term Reforms (2026–2027)

4. Establish a dedicated copyright industry statistical programme. INSTAT should include a copyright industry satellite account module in its structural business survey programme, following the WIPO methodology implemented in this study. Annual production of key indicators (GVA share, employment, trade balance) would enable time-series monitoring and support evidence-based policy evaluation. [Lead: INSTAT]

5. Strengthen CMO revenue collection and institutional capacity. Total collective management revenue of EUR 410,000 is unsustainably low and heavily dependent on a single regulated sector (OSHMA, audiovisual media service providers, at 73%), with very limited contribution from commercial users. Stakeholder consultations identified several concrete reform pathways: (a) integrate copyright tariffs into existing billing systems such as utility invoices or local tax collection mechanisms, embedding copyright payments into routine financial obligations; (b) enforce RTSH's legal obligation to allocate 1% of its budget to SUADA and to broadcast copyright awareness programming; (c) establish a centralised works registry with unique identification codes to enable accurate tracking and attribution; (d) grant SUADA executive title status to enable direct enforcement of payment claims. In parallel, the Copyright Directorate should conduct a market study of tariff compliance among commercial users (hotels, restaurants, retail, digital platforms) and develop a phased compliance programme with SIMS enforcement support. Regional comparators suggest that achievable annual CMO revenue for Albania's market size is at least 3–5 times the current level. [Lead: Copyright Directorate / SIMS / SUADA]

6. Support the transition from IT outsourcing to proprietary software products. The software sector's staff augmentation model generates employment and export revenue but leaves IP ownership and the associated royalty streams with foreign clients. Policy incentives should target Albanian-owned software product development, including: R&D tax credits for firms developing

proprietary software, co-investment funds for IP-generating startups, and IP literacy programmes for technology entrepreneurs. [Lead: AIDA (Albanian Investment Development Agency) / Ministry of Economy / NAIS (National Agency for Information Society)]

7. Conduct an enterprise-level copyright factor survey. Following the approach recommended by the WIPO Guide, a targeted survey of enterprises in partial-copyright NACE codes (architecture, design, furniture) would calibrate the copyright attribution coefficients used in this study. This would replace desk-derived estimates with empirically grounded factors and strengthen the credibility of future measurement iterations. [Lead: Copyright Directorate / INSTAT]

Tier 3: Structural and Long-Term Actions (2027+)

8. National Copyright Industries Strategy. Building on the evidence base established by this study, the government should develop a cross-ministerial strategy that integrates copyright policy with digital economy, education, trade, and EU accession objectives. The strategy should set measurable targets for copyright industry GDP share, employment, and trade balance, benchmarked against the WIPO transition-economy average of -5.0%. [Lead: MTCS / Interministerial]

9. Invest in creative sector infrastructure beyond IT. While software is the current growth engine, a diversified copyright economy requires investment in audiovisual production facilities, music recording infrastructure, digital

distribution platforms, and publishing modernisation. EU IPA III funds and Creative Europe programme participation should be leveraged to support these sectors. [Lead: Ministry of Economy and Innovation / Ministry of Tourism, Culture and Sport]

10. Integrate gender and inclusion monitoring into copyright industry statistics. This study's gender analysis (Chapter 7) was constrained by the absence of sex-disaggregated data for copyright-relevant sectors. Future INSTAT surveys should systematically collect gender, age, and regional breakdowns for NACE codes 58–63, 73, and 90–93, enabling evidence-based policies for inclusive participation in the creative economy. [Lead: INSTAT / Ministry of Health and Social Protection]

11. Develop a Creative Economy Satellite Survey. INSTAT should explore a complementary creative economy satellite survey methodology, potentially through a hybrid enterprise/household approach, to capture informal creative workers in music, performing arts, and digital content creation who are systematically underrepresented in the Structural Business Survey. The value chain profiles in Chapter 7 indicate that these sectors are highly informalised, with most artists working on a project basis. A dedicated survey instrument would strengthen the evidence base for the sectors where formalisation is lowest and where the current methodology is most likely to understate economic contribution. [Lead: INSTAT / Ministry of Tourism, Culture and Sport]

Annex A: Methodological Annex – Complete Technical Documentation



"This annex constitutes the complete technical audit trail for the quantitative analysis in Chapters 5, 6, and 8. It is designed to complement – not repeat – the methodological narrative in Chapters 3 and 4, which should be read first. The six tables below document: the Copyright Attribution Coefficients applied to each NACE division and their derivation (Table G-1); the principal analytical hypotheses tested and their outcomes (Table G-2); the BPM6 trade categories included in Chapter 6 and the attribution treatment applied to each (Table G-3); all known methodological limitations with their materiality rating and recommended mitigation (Table G-4); the master register of all primary data sources used in the analysis (Table G-5); and the complete record of stakeholder consultations conducted for this study (Table G-6).".

6.1 Copyright Attribution Coefficients Applied in Chapter 5

Table G-1 sets out the complete set of WIPO Copyright Attribution Coefficients applied in Chapter 5, together with the WIPO-recommended ranges, the justification for the coefficient selected, and the V12 Annex IV validation result.

Conservative values were applied where Albanian-specific enterprise-level evidence was limited.

Methodological note on the Non-Dedicated Factor (Table G-1, Row 10): The "Applied" column for the Non-dedicated category shows "DERIVED" because this study uses a WIPO-derived factor (f) rather than a fixed coefficient. The factor is calculated as: $f = D / (F - E)$, where D = attributed GVA of Categories I–III, E = raw GVA of Category IV industries, and F = total GDP. This formula is algebraically equivalent to the final CBI/GDP share (since $\text{Total CBI GVA} = D + E \times f$, and substituting $f = D/(F-E)$, the ratio Total CBI/GDP simplifies to f). This endogeneity means the factor is not an independently calibrated parameter but rather an adapted scenario that ensures internal consistency. Both the WIPO-derived factor and the traditional flat 0.02 coefficient are presented as alternative scenarios in the sensitivity analysis (Section 5.4). The WIPO-derived factor yields a non-dedicated contribution of approximately 0.25% of GDP, compared to approximately 0.08% under the flat 0.02 approach. See Chapter 5, item (8) for the full validation discussion.

NACE Code	Sector Description	WIPO Category	Min	Max	Applied	Justification
NACE 58–60	Publishing, Audiovisual & Broadcasting	I – Core	1.00	1.00	1.00	Core copyright industry, all output is a copyright work. Full attribution.
NACE 62–63	Computer Programming & IT Services	I – Core	1.00	1.00	1.00	Core copyright industry, software is a protected work under ACL. Full attribution.
NACE 90–93	Arts, Entertainment & Culture (adj.)	I – Core (adj.)	1.00	1.00	1.00	V12: NACE 90 standalone Core. NACE 92 (gambling) and 93 (sports) excluded per Annex IV. NACE 91 split separately (see below).

NACE 73	Advertising & Market Research	I – Core	1.00	1.00	1.00	Phase 1 validated: WIPO Guide classifies advertising as Core. SBS 2023: 3,169 emp, 643 ent. Employment-weighted GVA allocation from NACE 72–75.
NACE 26, 17, 32.20	Electronics, Paper & Musical Instruments	II – Interdependent	0.20	0.50	0.25	V12: NACE 26 (electronics), NACE 17 (paper – essential input to printing/publishing), NACE 32.20 (musical instruments). NACE 27–30 excluded per Annex IV. Midpoint of WIPO 0.20–0.50 range applied.
NACE 61	Telecommunications	IV – Non-dedicated	–	–	DERIVED	Reclassified from Cat II to Cat IV (v3.0) per WIPO Guide 2015. CAC = WIPO-derived factor
NACE 16	Manufacture of Wood Products	III – Partial	0.25	0.35	0.05	V12: NACE 18 (Printing) reclassified to Core (1.00); NACE 17 (Paper) to Cat II (0.25). NACE 16 (Wood) retained in Cat III at CAC 0.05, less than 1% of output goes to copyright sectors per I–O analysis.
NACE 71	Architecture & Engineering	III – Partial	0.10	0.20	0.10	V12: NACE 69–70 (legal, management consulting) excluded per Annex IV. NACE 71 retained, architectural works are copyright-protected, engineering output is not. Conservative 0.10 applied.
NACE 13–15, 23, 31, 32, 91.02/03	Textiles, Glass, Furniture, Other Mfg, Museums	III – Partial	0.10	0.20	0.15	V12: Textiles (13–15) at 0.05, Glass/non-metallic (23) at 0.02, Furniture (31) at 0.05, Other manufacturing (32 excl. 32.20) at 0.05, Museums (91.02/03) at 0.15. Weighted average reflects low copyright intensity across these sectors. Note: NACE 72/74/75 row removed, NACE 74 reclassified to Core at CAC 0.70 (see Section 3.3.1); NACE 72 and 75 remain at Cat III 0.15.
Remaining	Non-dedicated support sectors	IV – Non-dedicated	0.01	0.03	DERIVED	WIPO-derived factor $f = \text{Attributed GVA (Cat I+II+III)} / \text{Non-distribution GDP}$. Flat 0.02 used as sensitivity baseline.

Source: WIPO Guide on Surveying the Economic Contribution of the Copyright Industries (2015), Table 3.1; IDRA coefficient selection with INSTAT SBS employment cross-check. Conservative bias applied throughout.

6.2 Key Analytical Hypotheses and Outcomes

Table G-2 summarises the eight principal analytical hypotheses tested or adopted in Chapters 5, 6, and 9, together with their rationale, verification data, and outcome.

H#	Hypothesis	Chapter / Data	Outcome
H1	Albania's CBI collectively contribute more than 3% of GDP	Ch 5 – INSTAT GVA vs GDP	CONFIRMED. Total CBI = 4.31% of GDP (2024); peak 4.54% (2023). Albania above Kosovo (2.35%) but below Serbia (4.00%) benchmark.
H2	IT & Software (NACE 62–63) is the single largest and fastest-growing sub-sector within Core CBIs	Ch 5 – INSTAT SBS + national accounts	CONFIRMED. NACE 62–63 reached 34.9% of Core CBI GVA in 2023. GVA grew 102% over 2020–2024.
H3	Albania runs a structural IP royalties deficit (BH)	Ch 6 – Bank of Albania BoP	CONFIRMED. Net deficit EUR –23.9m in 2024. Structural deficit persists across entire 2008–2024 series.
H4	Computer services (BJ200) surplus offsets the IP deficit, placing Albania in overall copyright surplus	Ch 6 – Bank of Albania BoP	CONFIRMED. BJ200 attributed surplus = EUR +70.8m (2024, at 0.50 factor). Total attributed copyright services balance = EUR +63.4m.
H5	Albania's CBI GDP share is disproportionately high relative to WB peers (software anomaly)	Ch 5 + Ch 9 – INSTAT + comparator studies	CONFIRMED. 4.31% GDP estimate (2024) exceeds Kosovo (2.35%) and Serbia (4.00%)
H6	WIPO standard CACs are adequate proxies without enterprise surveys	Working assumption	ADOPTED. No Albanian enterprise survey exists. Cross-checks do not contradict CAC-derived estimates. Survey recommended.
H7	V12: NACE 90 standalone Core (1.00), NACE 91 split, NACE 92–93 excluded per Annex IV	Working assumption	SUPERSEDED. V12 applies Annex IV sector-level classification: NACE 90 Core (1.00), 91.01 Core (1.00), 91.02/03 Cat III (0.15), 92–93 excluded.
H8	Year-specific BoA rates applied for EUR conversions	Working assumption	CORRECTED. Year-specific Bank of Albania average rates applied (123.77–103.59 ALL/EUR). GDP share calculations unaffected (ALL÷ALL).

Source: IDRA Research & Consulting; WIPO Albania Study methodology working papers. H = Hypothesis. Confirmed = tested against data and validated. Adopted = accepted as working assumption without formal testing.

6.3 BPM6 Trade Classification - Chapter 6

Table G-3 summarises the BPM6 service categories used in Chapter 6, their copyright relevance, and the treatment decision applied.

BPM6 Code	Category	Copyright Link	Treatment	Notes
BH	Charges for use of intellectual property n.i.e.	Direct – royalties and licensing	Include (100%)	Licensing fees, royalties. Structural deficit for Albania.
BJ200	Computer services	Direct – software and IT exports	Attributed (50%)	Core export driver. 0.50 copyright attribution factor applied (see Section 6.3). 36% CAGR 2014–2024.
BJ300	Information services (derived)	Direct – data and content services	Include (100%)	Residual: BJ total – BJ100 – BJ200. Small in Albanian context.
BL100	Audiovisual and related services	Direct – film, music, streaming	Include (100%)	Small but growing. 2023 spike (EUR 29.4m) requires verification.
BL200	Other personal, cultural & recreational	Direct – cultural services	Include (100%)	Includes artist fees, cultural events, creative service exports.
BJ100	Telecommunications services	Infrastructure only	EXCLUDE	Not copyright content. Excluded from all copyright trade totals.

Source: Bank of Albania, Balance of Payments Statistics, Table 4, 2008–2024. IDRA classification decisions consistent with WIPO Guide Chapters 4 and 6.

6.4 Known Limitations and Mitigations

Table G-4 documents the principal methodological limitations of the study, their materiality to overall conclusions, and recommended mitigations for future revisions.

L#	Limitation	Chapters	Materiality	Mitigation / Recommendation
L1	No Albanian enterprise copyright survey – CACs applied from WIPO standard ranges	5	Medium	Commission INSTAT enterprise survey for next study cycle (2026). Cross-checks performed.
L2	INSTAT NACE 90–93 not disaggregated – sports and gambling included in arts aggregate	5	Low–Medium	V12: NACE 90 Core (1.00), 91 split, 92–93 excluded. SUT-based employment weights used for GVA allocation. Request 4-digit NACE data from INSTAT.
L3	2024 BOP data preliminary – Bank of Albania subject to revision	6	Low	Flagged throughout Chapter 6. Minor revisions expected; will not change structural conclusions.
L4	Full WIPO goods trade module not implemented. Customs HS data used for VKM	6	Medium	Services trade captures dominant flows. Customs data used for private copying levy analysis (EUR 274.1m import base). Full

	465 levy base analysis only (Section 6.8)			goods trade module recommended for next study cycle.
L5	Chapter 8 comparators use different base years (Kosovo 2019, Serbia 2012, NL 2022)	9	Low	All comparisons clearly labelled with base year.
L6	Employment data from SBS has variable sector coverage, some NACE codes underreported	5	Low	LFS national employment denominator used (more reliable). SBS used only for within-sector distribution.

Source: IDRA Research & Consulting; WIPO Albania Study methodology peer review. Materiality assessed against impact on headline GDP share figure.

6.5 Data Source Register

Table G-5 provides the master register of all primary data sources used in Chapters 5, 6, and 9.

Data Source	Publisher	Period / Year	Data Items Extracted
Annual National Accounts (sector GVA)	INSTAT	2020–2024	GVA by NACE code (2-digit); nominal ALL millions, current prices. Basis for Ch 5 calculation.
Structural Business Survey (SBS)	INSTAT	2020–2023	Employment by NACE code; enterprise counts. Used in Ch 5 employment analysis.
Labour Force Survey (LFS)	INSTAT	2020–2023	National employment (annual average). Used as denominator in copyright employment share.
GDP Estimates (Nominal)	INSTAT	2020–2024	Nominal GDP, current prices, ALL millions. Denominator for all % of GDP calculations.
Balance of Payments, Table 4	Bank of Albania	2008–2024	BPM6 credits/debits: BH, BJ, BJ100, BJ200, BL100, BL200 (EUR millions). Basis for Ch 6.
Kosovo Copyright Industries Study	Kosovo Government / WIPO	2017–2019	GVA share, employment share, trade balance, WIPO CACs applied. Chapter 8 comparator.
Serbia Copyright Industries Study	Serbia Government / WIPO	2008–2012	GVA share, employment share, sector breakdown, GDP context. Chapter 8 comparator.
Netherlands Copyright Industries Study	Dutch Gov. / WIPO	2022	GVA share, employment, AV/IT sector composition, EU digital market position. Chapter 8 comparator.
EUR/ALL Exchange Rate	Bank of Albania	2020–2024	Annual average nominal rate. Year-specific BoA average rates applied (123.77 for 2020, 122.33 for 2021, 118.77 for 2022, 108.20 for 2023, 103.59 for 2024, 96.5 for 2025).

Table G-6: Stakeholder Consultations Conducted for This Study

Institution	Category	Date	Format	Key Information Provided	Used In
ALBAUTOR	Collective Management Agency (authors' rights)	20 January 2026	In-depth interview	membership (490 active members); 84 reciprocal international agreements; staffing (approx. 4 employees); reliance on international vs. domestic collections	Ch. 2 §2.3.2; Ch. 9 §9.2
SUADA	One-Stop Shop for Copyright Administration	13 February 2026	In-depth interview	2024 revenue distribution (ALL 42.5m total); payer composition; governance structure; staffing decline (15 → 4 employees); enforcement constraints; reform proposals	Ch. 2 §2.3.3; Ch. 6 §6.8; Ch. 9 §9.2
FAAD	Collective Management Agency (audiovisual authors and producers)	19 February 2026	In-depth interview	Membership (120 audiovisual authors, 32 producers); 18 international reciprocal agreements; estimated market value EUR 20m; domestic collection largely non-functional	Ch. 2 §2.3.2
A.K.D.I.E.	Collective Management Agency (performers' rights)	21 February 2026	In-depth interview	Operational profile; role in music and audiovisual rights management	Ch. 2 §2.3.2
Copyright Directorate (MTCS)	Competent authority for copyright policy and CMO licensing	17 December 2025, 22 January– 13 February, 22 March 2026	Desk consultation / document review and meetings	CMO licensing data; enforcement architecture; institutional mandate; EU accession alignment status	Ch. 2 §2.1–2.5
General Directorate of Customs	Customs authority	29 March 2026	Data provision	2025 customs data: imports within DCM 465/2023 scope (EUR 274.1m across 2,875 importers)	Ch. 2 §2.3.4; Ch. 6 §6.8
INSTAT	National Statistics Institute	9 February 2026	Formal written confirmation	Confirmed that sex-disaggregated LFS tabulations are not produced at 2-digit NACE level	Ch. 7 §7.1
Validation workshop	All key stakeholders	25 May 2026	Stakeholder workshop	Findings presented and validated; comments incorporated into final version	Ch. 1 §1.1; Annex A

6.6 Input-Output Analysis – Technical Documentation

This annex documents the technical derivation of the input-output multipliers summarised in Section 5.5. The analysis draws on INSTAT's official 2023 Supply-Use Tables (64×64 sector classification, current prices). Copyright-relevant activities are captured within the 64-sector groupings; a few of these (notably IT with information services, and film with broadcasting) appear as combined sectors, which sets the level of detail of the estimates.

Methodology. The 64×64 intermediate consumption matrix Z was extracted from the Use table. Total output per sector was computed as $x = IC + GVA$ and cross-validated against the Supply table (zero mismatches across all 64 sectors). The technical coefficient matrix A was derived as $a(i,j) = z(i,j)/x(j)$, with all column sums satisfying the Hawkins-Simon condition ($\max = 0.82$, well below 1.0). The Leontief inverse $L = (I - A)^{-1}$ was computed for 63 active sectors (excluding sector U with zero output). The matrix is well-conditioned (condition number = 3.99) with no negative elements, confirming numerical reliability. Type I output multipliers are the column sums of L ; Rasmussen backward and forward linkage indices are computed as each sector's column (row) sum normalised by the economy-wide average.

Type I Output Multipliers. The economy-wide average Type I output multiplier is 1.95, meaning that each ALL 1 of final demand generates ALL 1.95 of total output on average (direct plus indirect effects). Eight of the fourteen copyright-related sectors exceed this average, indicating that copyright industries are, on the whole, more deeply embedded in the domestic

production network than the typical Albanian sector. The highest multipliers among copyright sectors are: Telecommunications (J61: 2.63), Wood Products (C16: 2.42), Paper Products (C17: 2.33), Film/TV/Broadcasting (J59_60: 2.23), Sports and Amusement (R93: 2.06), Advertising (M73: 2.04), and Publishing (J58: 1.98). IT and Software (J62_63: 1.65) and Arts/Entertainment (R90T92: 1.57) show lower multipliers, reflecting their high value-added intensity (GVA/output ratios of 67% and 70% respectively) and correspondingly lower intermediate purchasing from other domestic sectors.

Backward and Forward Linkages. Three copyright-related sectors qualify as “key sectors” (both backward and forward linkage indices above 1.0): Telecommunications (J61: BL 1.35, FL 1.17), Paper Products (C17: BL 1.20, FL 1.24), and Wood Products (C16: BL 1.24, FL 1.04). Several core copyright sectors show strong backward linkages only: Film/TV/Broadcasting (J59_60: BL 1.14), Publishing (J58: BL 1.01), Printing (C18: BL 1.01), and Advertising (M73: BL 1.04). This means these sectors pull above-average inputs from other domestic sectors, generating significant upstream demand-stimulus effects.

I-O Validation of Copyright Attribution Coefficients. The intermediate flow analysis provides an independent evidence base for validating the Copyright Attribution Coefficients applied in Chapter 5. Three findings are noteworthy:

(i) Telecommunications (J61, CAC 0.02): 34.2% of telecom's intermediate purchases flow to copyright sectors; advertising (ALL 6.7 bn, 10.9%), film/TV content (ALL 4.5 bn, 7.4%), paper (ALL 4.1 bn, 6.7%), and printing (ALL 3.9 bn, 6.4%). While these backward linkages are substantial, the

WIPO Guide (2015) explicitly places “telephony and internet” in Category IV (Non-dedicated Support). Interdependent industries are defined as hardware/equipment enabling copyright consumption (TV sets, computers, etc.), whereas telecom is distribution infrastructure. The I-O backward linkage data are documented here as valuable structural context, but do not override the WIPO classification framework.

(ii) NACE 16–18: The I-O data reveal sharply different copyright intensities within this former aggregate, which informed reclassification. Wood products (C16) sells less than 1% of its intermediate output to copyright sectors, retained in Cat III at CAC 0.05. Paper products (C17) has a real but secondary copyright link: 10.9% of sales go to printing, publishing, film/TV,

and advertising at CAC 0.25. Printing (C18) is directly copyright-linked at CAC 1.00.

(iii) The I-O analysis confirms that copyright industries, taken as a group, generate above-average multiplier effects in the Albanian economy. This is policy-relevant: investment in copyright sectors yields higher-than-average total economic stimulus, strengthening the economic case for intellectual property protection and creative-sector development.

Important note. The Supply-Use Tables reflect the 2023 economic structure, while Chapter 5’s GVA time series extends to 2024 with preliminary data. I-O coefficients and multipliers are structurally stable year-on-year, so the 2023 linkage analysis remains analytically valid for interpreting 2024 dynamics. Full results are provided in the accompanying Excel workbook (IO_Analysis_Albania_2023.xlsx).

This annex provides a technical summary of the WIPO Guide on Surveying the Economic Contribution of the Copyright Industries (2015 edition) as applied in this study, including standard industry groupings, recommended attribution coefficients, copyright goods HS code lists, and guidance on data sources.

The WIPO Guide on Surveying the Economic Contribution of the Copyright Industries (2015 edition) establishes the following standard classification framework. This annex reproduces the key reference tables as applied in this study.

A.1 Standard Industry Groupings

The WIPO methodology classifies copyright-relevant industries into four categories based on the degree to which copyright is central to their function: (I) Core Copyright Industries, industries whose primary purpose is to create, produce, distribute, or exhibit copyright materials; (II) Interdependent Copyright Industries, industries that facilitate the creation, production, or use of copyright materials through equipment supply; (III) Partial Copyright Industries, industries where a portion of activities relates to copyright materials; and (IV) Non-Dedicated Support Industries, industries that support the distribution of copyright materials as part of broader commercial activities.

A.2 Recommended Attribution Coefficient Ranges

The WIPO Guide (2015) does not provide a single recommended numerical range applicable across all countries for Category II–IV coefficients. Rather, the Guide recommends that "the value assigned to them would be based on the judgment of the research team undertaking

the analysis and the experience of past studies" (paras. 143–148, p. 59–60). For Category III (Partial Copyright), the Guide describes a survey-based procedure (Section 6.2.3.8, paras. 357–359) in which firm responses are mapped to copyright factors ranging from 50% to 1%, depending on the answer category. For Category IV (Non-dedicated), the Guide provides an explicit formula: $f = \{(Core - d) + (Interdependent - d) + (Partial - d)\} / GDP - D$ (Section 6.2.3.9, para. 360), where d denotes dedicated distribution industries. Empirical comparator factors compiled across national studies (e.g., Netherlands 2025, Appendix B.1) confirm substantial cross-country variation – factors for the same industry can range by an order of magnitude across countries (e.g., apparel and textiles factors from 0.005 in Moldova to 0.87 in France). This study therefore selects coefficients from the empirical comparator literature rather than from a (non-existent) specific WIPO numerical range, with each choice documented in Annex A alongside its comparator basis.

A.3 Three Analytical Dimensions

For each industry category, the WIPO Guide requires measurement of three dimensions: (i) Gross Value Added (GVA) and its share of GDP, using national accounts data mapped from the national industry classification to the WIPO reference list; (ii) Employment, measured as total people employed (with full-time equivalents and sex-disaggregation where available); and (iii) Foreign Trade in copyright goods and services, using customs data (for goods, classified by HS codes listed in the Guide) and balance of payments data (for services, using BPM6 categories).

Annex C: Statistical Tables

Full statistical tables supporting all quantitative findings in Chapters 5 and 6. Tables are provided in disaggregated form to support future replication and methodological audit.

The tables below present the detailed statistical data underlying the quantitative analysis in Chapters 5 and 6. All figures are sourced from the Chapter 5 and Chapter 6 Calculation Workbooks.

Table C-1: Gross Value Added by NACE Aggregate, 2020–2024 (ALL millions, raw, pre-attribution)

Cat.	NACE Sector	2020	2021	2022	2023	2024
I	58–60 Publishing, audiovisual & broadcasting	9,222	10,379	11,233	11,438	11,779
I	62–63 IT & computer services	13,971	18,541	24,990	28,773	28,203
I	90–93 Arts, entertainment & recreation	13,510	17,758	21,836	27,100	29,960
I	72–75 Professional, scientific & technical (incl. 73 advertising, 74 design)	20,390	20,640	26,066	29,560	29,700
I	16–18 Wood, paper & printing	6,810	7,224	8,820	9,476	9,088
II	26–30 Electronics & computing equipment	2,717	3,971	5,798	9,577	9,512
III	13–15 Textiles, apparel & footwear	34,475	35,993	45,292	45,915	39,283
III	31–33 Furniture & other manufacturing	7,677	9,453	12,900	13,131	11,709
III	69–71 Legal, accounting & architecture	42,243	42,641	57,032	60,417	62,309
III	22–23 Rubber, plastics & non-metallic minerals	16,863	18,816	23,414	19,708	19,528
IV	61 Telecommunications	14,755	14,375	15,934	17,811	17,240
IV	46 Wholesale trade	98,798	112,605	159,090	169,802	179,012
IV	47 Retail trade	82,134	89,547	126,017	126,844	132,476
IV	49–53 Transportation & storage	42,096	52,801	73,993	75,759	83,862

Table C-2: Employment by NACE Code, 2020–2023 (people)

Cat.	NACE Sector	2020	2021	2022	2023
I	58 Publishing	1,137	1,564	1,499	1,522
I	59 Film/Video/Sound	622	676	787	856
I	60 Broadcasting	4,159	4,294	4,528	4,407
I	62 Computer programming	5,938	8,636	10,599	11,705
I	63 Information services	2,051	2,081	2,448	2,784
I	73 Advertising	2,152	3,192	3,635	3,169
I	90 Creative arts (raw)	957	1,294	1,483	1,761

I	91 Libraries/Museums (raw)	577	575	606	668
II	26 Electronics mfg.	132	142	180	242
III	17 Paper products	2,612	2,801	3,571	3,207
III	71 Architecture/Engineering	6,123	6,922	7,501	7,595
III	74–75 Professional activities	1,498	1,015	1,627	2,068
IV	61 Telecommunications	3,801	4,275	4,212	4,207

Table C-3: Copyright Services Trade by BPM6 Code, 2008–2024 (EUR millions, credits)

BPM6 Code	2008	2014	2018	2022	2024
BH – IP Royalties	26.7	0.6	12.7	12.4	5.9
BJ200 – Computer Services	11.7	9.5	37.6	141.1	206.1
BJ100 – Telecom Services	99.0	114.9	26.4	14.5	15.1
BL100 – Audiovisual	1.0	1.8	8.0	9.9	14.1
BL200 – Cultural/Recreational	8.1	7.3	4.0	28.7	23.3

Source: Tables D-1 and D-2 from Ch5 Calculation Workbook (RAW_GVA, RAW_EMP sheets). Table D-3 from Ch6 Calculation Workbook (RAW_BOP sheet). All GVA figures are raw (pre-attribution). Employment figures are raw headcounts from INSTAT SBS. Trade figures are Bank of Albania BoP Table 4 (credits = exports). Selected years shown; full annual series available in workbooks.

Note: Complete annual data for all years and all BOP codes are available in the companion Excel workbooks. The tables above present selected years for readability. Attributed (post-CAC) GVA and employment figures are presented in the main text (Chapter 5, Tables 5.1–5.4).

Annex D: Glossary of Terms



Term	Definition
Copyright industries	Industries whose primary or partial economic function involves the creation, production, distribution, or exhibition of copyright-protected works.
Core copyright industries	Industries in which copyright is wholly or primarily essential to their activities (WIPO Category I).
Gross Value Added (GVA)	The value of output minus the value of intermediate consumption; the primary measure of economic contribution at the sector level.
Attribution coefficient	A factor (between 0 and 1) applied to industries in WIPO Categories III and IV to estimate the share of their economic activity attributable to copyright content.
CMO	Collective Management Organization, an entity that collectively administers copyright and related rights on behalf of rights-holders through licensing.
NACE Rev. 2	The European standard classification of economic activities, used by INSTAT in Albanian national statistics.
LFS	Labour Force Survey, the primary INSTAT household survey measuring employment, unemployment, and labour market characteristics.
BPM6	Balance of Payments and International Investment Position Manual, 6th edition, the IMF standard used for trade in services statistics.
EU acquis	The accumulated body of EU law and obligations that candidate countries (including Albania) must transpose and implement as part of the EU accession process.
DSM Directive	EU Directive 2019/790 on Copyright in the Digital Single Market, a key piece of pending transposition for Albania under Chapter 7.



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