

Skills2Capabilities

Working Paper No. 2

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ABSTRACT

Education and skills are central for both economic performance and societal well-being. This insight has been increasingly addressed by policy-makers on national and European level. In order to address these overarching challenges, an increasing share of countries have used strategic policy documents in the area of skills policy. However, the overall goals and orientation of different strategies and their proposed actions can vary substantially. Policy-making in industrialized economies has long focused on the benefits of acquiring skills for realizing prospective economic returns via access to well-paid jobs, but the importance of skills for a wider range of social and human/personal development aspects has in part also been taken up by policy-making. The tensions between such different orientations and approaches will be analysed as part of Work Package 2. In this first deliverable of Work Package 2 (D2.1), we provide a review of the literature, present our analytical framework for analysing skills strategies as well as our empirical approach, and present our analysis of strategic policy documents on skills at the hand of 6 country case studies, capturing the strategic document's main foci, their comprehensiveness and the extent of their implementation.

Skills2Capabilities, a Horizon Europe study, is about understanding how skills systems need to develop if they are to assist people to make labour market transitions – i.e. between jobs, employers or sectors – and thereby reduce the level of skill mismatch which might otherwise arise. This Working Paper is part of Skills2Capabilities WP2 on ‘Skills Policies’

For more information please visit skills2capabilities.eu

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Preface & Summary

Education and skills are central for both economic performance and societal well-being. This insight has been increasingly addressed by policy-makers on national and European level. In particular structural challenges as the twin digital and green transition, combined with the recent Covid-19 pandemic, have shown that skills are essential for individuals to participate both in economy and society. In order to address these overarching challenges, an increasing number of countries have used strategic policy documents in the area of skills policy in the past two decades. For example, the OECD has promoted manifold national skills strategies in their member countries (OECD, 2019) (Denmark, Spain, Lithuania, to just mention a few), an approach which has also been emphasized in the new European Skills Agenda (European Commission, 2020b). Similarly, a variety of countries have launched dedicated Lifelong Learning Strategies, in part (but not exclusively) in relation to the European Union's focus on Lifelong Learning (European Parliament and Council of the European Union, 2006).

However, the overall goals and orientation of different strategies and their proposed actions can vary substantially, as also visible in the major scientific contributions inspiring skills policy making in industrialized economies. A main angle of skills policy-making has certainly been the insight that acquiring skills facilitates the realization of prospective economic returns via access to well-paid jobs (see for example the seminal contribution of Becker, 1964). However, skills policy-making has increasingly also taken into account the importance of skills and learning for a wider range of social and personal/human development aspects (e.g. democratic participation, social engagement and inclusion), seeing access to well-paid employment/a vocation as only one of manifold “functionings” of skills.

The tensions between such different orientations and approaches will be analysed as part of Work Package 2. As the first deliverable of Work Package 2, this report (D2.1) observes skills policies at the example of national skills strategies. We assume that the analysis of skills strategies and their goals will allow us to make broader statements of the direction of skills policies in a country per se, therefore providing a ‘shortcut’ for identifying the direction of policy-making in a given country and its development over time and how they balance economic vis-à-vis social & personal/human development aims. Furthermore, we argue that analysing skills strategies is of essential relevance on itself, given the high importance that such strategic documents have gained in policy-making over the last years. However, despite this apparent importance, little systematic accounts exist that analyse strategic policy documents and their implementation across countries.

Skills strategies are analysed through 6 country case studies, capturing the strategic policy documents' main foci, their comprehensiveness and the extent to which they have

been implemented. After an introduction to the report, including a literature review and a presentation of our rationale for observing national skills strategies (strategic policy documents), we present our approach for analysis, including methods and case selection and our analytical framework used for analysing national skills strategies. The case studies are then presented one by one. The presented case studies constitute first draft versions to be further developed, and ultimately to be used as a basis for comparison in the Comparative Report D2.3 due in December 2024.

Introduction and rationale

The importance of education and skills for economic performance and societal well-being has become conventional wisdom among policy making. The recent prominence of mega-trends in political discussions, including the twin digital and green transition and the recent Covid-19 pandemic, have even increased this focus, as visible in the European Skills Agenda that aims to improve and adapt skills development and use to such challenges (European Commission, 2020b). Future job growth will to a significant extent take place in the service sector, while jobs in “non-green” industries (those dependent on fossil fuels and energy-intensive manufacturing) are projected to decline (European Commission, 2020a). Studies have shown that due to digitisation and automation and the continued growth of the service sector, skill demands of businesses are increasing, and ICT and soft skills are becoming more important (Cedefop, 2018b; Helmrich et al., 2016). At the same time, certain skills, for example with regard to ICT and soft skills, also become more and more essential to participate in society and democracy, as for example the increase of digital forms of communication and E-government have shown.

In the past decades, policy-making in industrialized economies has often focused on the benefits of acquiring skills for realizing prospective economic returns via access to well-paid jobs (cf. Becker, 1962). Scientific contributions to the debate often encouraged the orientation of education and training investments according to the immediate needs of labour markets, as for example reflected in publications and policy recommendations from the Organisation of Economic Development and Cooperation (OECD, 2019). Frequent main goals of policy strategies following this rationale consequently include resolving “skills mismatches” (Cedefop, 2015). Such skills mismatches refer to a “gap between the aggregate supply and demand for skills, typically with reference to a specific geographical unit [...], and to the fact that observed matches between available workers and available jobs offered by firms [...] are sub-optimal” (Brunello and Wruuck, 2021). More specifically, on the one hand, policy responses in many countries aim to resolve skills shortages (i.e. employers facing an insufficient supply of candidates with the skills they deem suitable), which might arise due to horizontal mismatches (an insufficient supply of candidates with the ‘right’ types of skills regarding sectors/occupations) or vertical mismatches (employers facing a supply of candidates with too low levels of skills) (Cedefop, 2010). On the other hand, also the topic of ‘overskilling’ can be, with variation among countries, a focus of policy makers, with workers showing a higher level of skills than required by their actual job (Cedefop, 2018a; McGuinness; Pouliakas and Redmond, 2018). In any case, common of such approaches aiming to resolve skills mismatches is their focus on labour market imbalances, with a tendency for policy interventions to target the supply side of skills (i.e. education and training of individuals) in order to match the demands of firms.

In part, however, policy-makers have become also increasingly attentive to the role skills and learning might play for a wider range of societal and citizenship issues, for example by “maintaining polity and civil society” (Holford et al., 2008). This is reflected for example in the European Union’s recommended key competences for lifelong learning, which include issues like “social and civic competences” and “cultural awareness and expression” (European Parliament & Council of the European Union, 2006). Similarly, already the 2002 UNESCO report “Education for all” suggested that policies should be “judged to be successful if they have enhanced peoples’ capabilities”, and not only their income (Global Education Monitoring Report Team, 2002). Theoretically, these ambitions align with contributions that see access to well-paid employment/a vocation as only one of manifold “functionings”¹ of skills, inspired by the works of Sen (1999) and Nussbaum (2020).

Evidently, orienting education and training systems alongside economic goals and immediate labor market needs might certainly help to improve individuals’ “capabilities” for achieving the functioning of a well-paid job. However, manifold other potential functionings of skills might be disregarded by such a human capital focused perspective, in turn restricting individuals’ capabilities. Also other potential functionings, for example democratic participation, social engagement and individuals’ overall well-being, are highlighted in the literature, and applied to various education sectors such as higher education (e.g. Walker and Unterhalter 2007), compulsory education (e.g. Graf, Kapferer and Sedmak 2013), vocational education (e.g. Powell and McGrath 2019) and adult education (e.g. Boyadjieva and Ilieva-Trichkova 2021), and skills policies in general (Bryson, 2015). These different approaches towards skills and education are not only theoretically relevant, they can offer a useful analytical tool to distinguish the different policy approaches applied on the national-level. Not only can such different approaches towards skills policies be reflected in the positions of political parties, but also different institutions (Ministries of Education, Ministries of Labour), educational sectors and ultimately national policy strategies (as reflected in strategic policy documents).

In the past decades, an increasing share of countries have used strategic policy documents in the area of skills policy (“national skills strategies”). Strategic policy documents can be defined as “official policy documents on an important policy area that are usually issued by top-level authorities and set out specific objectives to be met and/or detailed steps or actions to be taken within a given time frame, in order to reach a desired goal” (European Commission; EACEA and Eurydice, 2021), and have to be differentiated

¹ In the human capability approach, a “functioning is an achievement that reflects the various things a person may value being or doing” (Bryson 2015).

from (lower-level) actions of such strategies². However, the analysis of national skills strategies has remained limited, and “little is known about the effectiveness, results and impact of developing such strategies” (Working Group on Adult Learning, 2022). This is striking, given the increasing importance of strategic documents for policy-making in the past decades and the emphasis organizations as the OECD and the EU place on such strategies in their respective policy recommendations. For example, the OECD has promoted manifold national skills strategies in their member countries (OECD, 2019) (Denmark, Spain, Lithuania, to just mention a few), an approach which has also been highlighted as essential by the new European Skills Agenda (European Commission, 2020b). Similarly, a variety of countries have launched dedicated Lifelong Learning Strategies, in part (but not exclusively) in relation to the European Union’s focus on Lifelong Learning (European Parliament and Council of the European Union, 2006). However, academic literature on skills policies has remained reluctant in focusing on strategic documents, and only isolated accounts exist explicitly tackling them as an analytical focus (Markowitsch; K  pplinger and Hefler, 2013). In applied research literature and national monitoring and evaluation reports, the topic of strategic documents on skills has become more pronounced in recent years, however, not without shortcomings.

Isolated analyses of individual strategies exist (Hefler et al., 2018; OECD, 2021a; Unterweger, 2020), as well as reports that provide a cross-national, descriptive overview over existing national lifelong learning and skills strategies (Andriescu et al., 2019; European Commission; EACEA and Eurydice, 2015, 2021; Working Group on Adult Learning, 2022). However, none of these accounts attempt to provide broader lessons learned for the design and implementation of national skills strategies that at least allow for “contingent generalization” across a “bounded population of cases” (Beach and Pedersen, 2016b). Existing comparative reports also offer little systematic, analytical insights on how different countries’ approaches towards developing strategic documents vary, and do not aim to use comparative methods to identify broader lessons learned concerning the respective comprehensiveness and implementation of these strategies. Furthermore, no studies are known to the authors observing how different countries approaches towards national skills strategies and their goals and implementation have developed over time. Finally, while some general contributions to assess strategic policy documents exist (for a review, see for example Aubrechtova; Semancikova and Raška, 2020), they either remain on a very superficial level, providing “one-size-fits-all” solutions with few empirical evidence provided (see for example the approach by Doran, 1981

² Instruments, measures and projects that are individual and “concrete policy interventions with a plan, a budget, a start, and an end date” (Cedefop, 2015).

originating from management studies) or usually do not take the context of skills policy making into account.

Consequently, generating comparative insights (cross-country and intertemporal) appear to be central, and could consequently be vastly beneficial for developing the next generation of such policy-documents. Work Package 2 aims to address these research gaps, attempting to provide broader lessons learned for policy makers while at the same time remaining attentive to different countries' contexts and therefore to the different conditions national skills strategies face (e.g. types of political economies, skill formation systems and industrial relations traditions present).

Approach of the study

Case study design

For deliverable D2.1, in total 6 country case studies have been produced, each of which analyses national skills strategies within the respective country. In a later, separate comparative report (D2.3), cross-country analysis will be carried out (see also outlook chapter), analysing different approaches towards designing and implementing skills strategies, with potentially variations in success for reaching their goals.

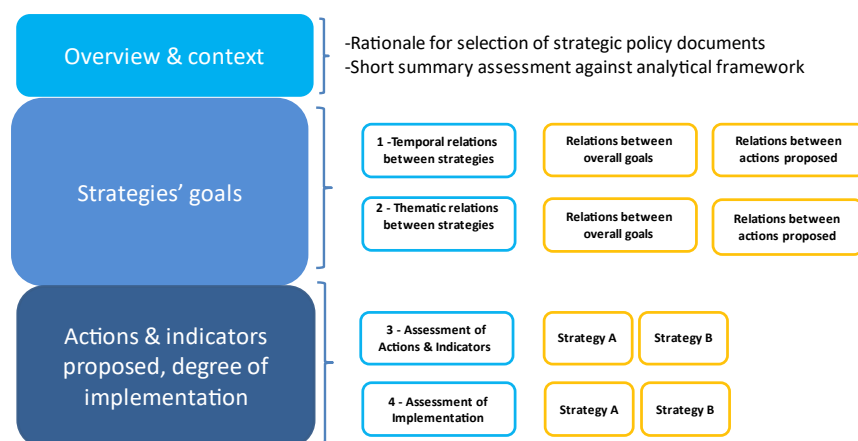
A figure indicating the country case studies' structure is presented below. Even though data gathered is in part extensive³, included case studies are kept at a limited length in order to produce a shorter and easily comprehensible deliverable that can be subsequently transformed/expanded into publishable material (e.g. journal articles, book chapters, etc.). Consequently, the included case studies only constitute first draft versions to be further developed, and to be used as a basis for comparison in the Comparative Report D2.3 due in December 2024.

In each case study, we are interested in

- The **temporal relation between strategies within a country**, more specifically how the different strategies developed over time, and in how far their overall goals built upon each other or signify a shift in priorities.
- The **thematic orientation of strategies within a country**, including in how far the different goals of the strategies align with economic and/or social & personal development goals.
- The inclusion of quantitative **indicators** to capture progress on goals, the inclusion of specific **actions** to follow up on goal (e.g. larger system-level reforms, the introduction of single new policy instruments, etc.), as well as their respectively proposed timeline.
- The **implementation of a strategy**, which addresses if the respective quantitative targets have been reached, as well as if the proposed actions to follow up on goals have been implemented. Furthermore, barriers for not reaching goals/not implementing actions should be part of the analysis.

³ For example, a full application of the analytical framework (see next section) to each case study has been conducted, which can be accessed on our project homepage.

Figure 1 Elements of country case studies on national skills strategies



To guide data collection and the analysis of skills strategies and ensure comparability across cases, an analytical framework has been developed, which is presented in the next section.

Analytical framework

The developed analytical framework makes comparison between different national skills strategies, their goal dimension, as well as actions & indicators proposed and their degree of implementation possible while at the same time supporting country researchers to write the case studies. The analytical framework has been structured into several “issue areas” (i.e. topics - indicated in the first column) that built upon the European Union’s Skills Agenda and the OECD Skills Strategy framework (European Commission, 2020b; OECD, 2019). We structured the framework into the following issue areas/topics:

1. Vocational education and training (IVET, CVET)
2. General and higher (academic) education
3. Governance and coordination; Stakeholder/social partner involvement
4. Skills for life & skills to cope with structural transitions (basic skills, green skills, digital skills, transversal skills, entrepreneurship skills)
5. Skills information systems: Anticipating/forecasting skills
6. (Career) guidance and validation

Country research teams could in addition inductively add additional issue areas in order to cover all of the most important issue areas considered by the respective skills strategy/lifelong learning strategy in the respective country, in case the strategies’ breadth could be covered solely by the issue areas already included in the framework.

For each analysed strategy and structured into the different observed issue areas, country research teams were asked to insert the following types of information in the cells of the analytical framework (columns 3-7):

- Which goals the strategy presents with regard to the respective issue area
- Which actions are proposed in the strategy to follow up on goals
- Which quantitative indicators were defined on how to capture progress on goals/actions
- Which actions to follow up on goals have been implemented
- If progress against indicators been achieved/quantitative targets reached

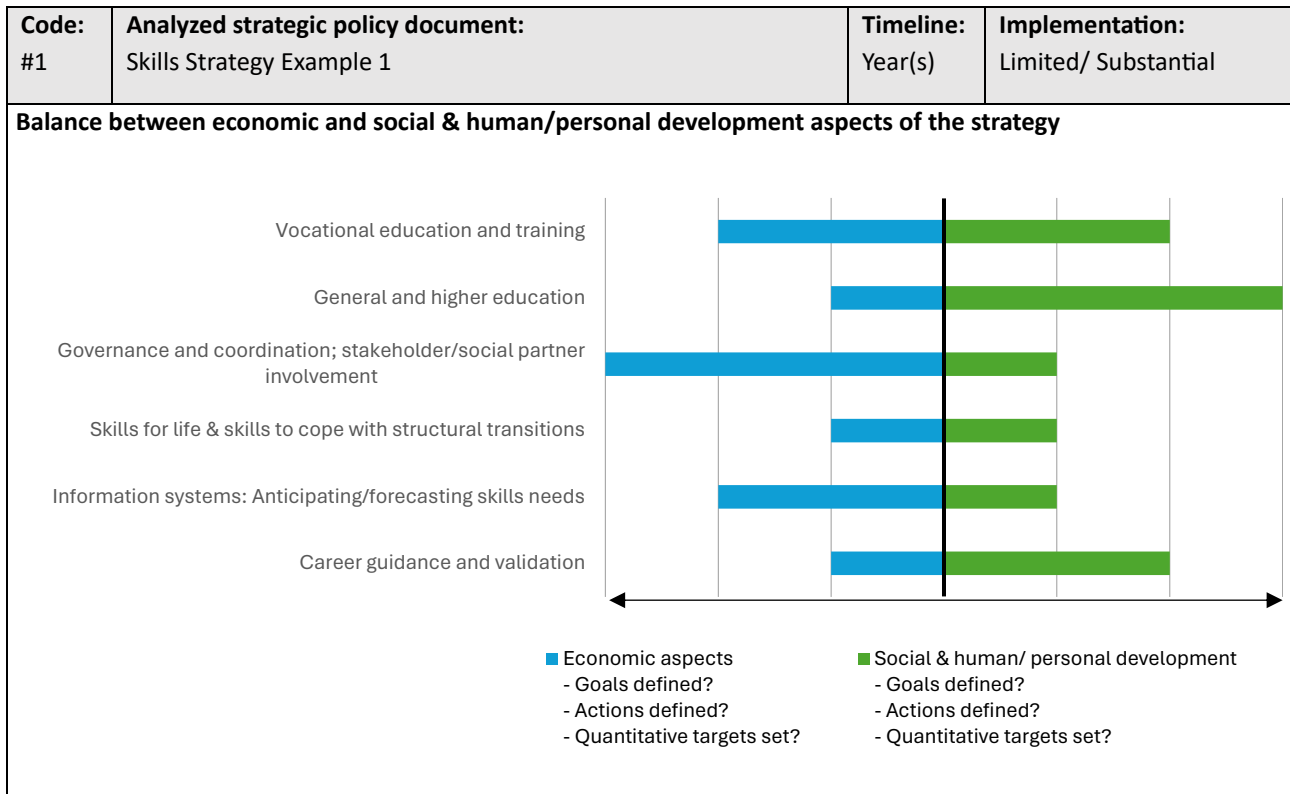
The respective information was inserted in the blue, yellow or green cells depending on if the goal/indicator/action's *orientation* aligns more with economic goals (blue), social & human/personal development goals (green) or both/ aspects not clearly associated with either economic or social & human/personal development goals (yellow). This information allows for the possibility to analyse the balance between the different types of goals per strategy.

In order to ensure that the interpretation of what can be considered as an economic goal respectively a social or human/personal development goal is comparable across country research teams, the analytical framework template distributed to country research teams was pre-filled with deductively created examples. These examples were drawn from a wide range of literature from academic and applied research, including accounts originating from human capital theory as well as the capabilities approach (Arenas Diaz, 2020; Bonvin, 2012; Boyadjieva, 2021; Bryson, 2015; Cedefop, 2023a; Dean, 2005; López-Fogués, 2012; McGrath, 2022; Muñoz, 2022; Nussbaum, 2011; OECD, 2019; Oliver, 2019; Otto, 2017; Rodríguez-Soler, 2018; Vero, 2012). The full framework including examples drawing on this literature is provided in the annex to this report. Below, a reduced version of the framework without these examples is provided for illustrative purposes.

Name of Skills/lifelong learning Strategy: Indicated duration of Skills/lifelong learning Strategy:							
Issue area	Orientation	Which goals does the strategy outline with regard to the respective issue area?	Are actions proposed to follow up on goals?	Are quantitative indicators defined on how to capture progress on goals/actions?	Have the actions to follow up on goals been implemented?	Has progress against indicators been achieved/quantitative targets reached?	
1. Vocational education and training (secondary and higher; IVET and CVET)	Aspects depicted as of mainly economic importance						
	Aspects depicted as of importance for both economic and social & personal/human development aims						
	Aspects depicted as of importance for social & personal/human development aims						
2. General and higher (academic) education	Aspects depicted as of mainly economic importance						
	Aspects depicted as of importance for both economic and social & personal/human development aims						
	Aspects depicted as of importance for social & personal/human development aims						
3. Governance and coordination; Stakeholder/social partner involvement in skills policies	Aspects depicted as of mainly economic importance						
	Aspects depicted as of importance for both economic and social & personal/human development aims						
	Aspects depicted as of importance for social & personal/human development aims						
4. Skills for life & skills to cope with structural transitions	Aspects depicted as of mainly economic importance						
	Aspects depicted as of importance for both economic and social & personal/human development aims						
	Aspects depicted as of importance for social & personal/human development aims						
5. Information systems: Anticipating/forecasting skills needs	Aspects depicted as of mainly economic importance						
	Aspects depicted as of importance for both economic and social & personal/human development aims						
	Aspects depicted as of importance for social & personal/human development aims						
6. (Career) Guidance and Validation	Aspects depicted as of mainly economic importance						
	Aspects depicted as of importance for both economic and social & personal/human development aims						
	Aspects depicted as of importance for social & personal/human development aims						

When applied to a specific strategic policy document on skills, the analytical framework consequently allows to draw conclusions on the issue areas considered per strategy, the balance between economic goals and social & human/personal development goals per issue area, as well as their implementation. An overview box graphically illustrating this information has been created per strategy, as visible in the example box below. ⁴

Box 1 Example of analyzed strategic policy documents



⁴ Per issue area, the graph illustrates the comprehensiveness of a strategy. Economic aspects are depicted on the left side, social & human/personal development aspects of the strategy on the right side. A maximum of 3 “points” can be added on the left as well as the right side of the graph. One “point” is added if 1) the respective economic or social & human/personal/development goal has been considered by the strategy, 2) an action has been defined to implement the respective economic/social& human personal/development goal, 3) a quantitative target has been defined to track progress of respective economic/social& human personal/development goals. Half blocks were assigned in case goals/actions/quantitative targets were partly considered by the strategy. Implementation is addressed separately above the graph.

Case selection

In each country chosen for analysis, we have identified (at least) 2 major skills and/or lifelong learning strategies according to the following criteria:

1. We are interested in *major*, high-level, large-scale skills strategies that encompass more than one educational sector (e.g. initial vocational training + continuing vocational training, general (liberal) adult education + job-related adult learning, continuing vocational training + higher education, etc.)
2. We are only interested in strategies whose planned timeframe is already over, so that we can assess which of the proposed actions have been implemented, while at the same time focusing on more recent strategies to keep the analysis relevant for policy-making

Based on these criteria, in most cases, the most recent major strategic policy documents on skills whose timeframe is already over, as well as its predecessor strategy, were selected for analysis. In terms of countries chosen for analysis, we aimed to cover of all main types of skill formation systems present in Europe: collective (dual apprenticeship) skill formation systems; statist (school-based) skill formation systems; liberal skill formation systems, hybrid skill formation systems combining more than one tradition, as well as transitional skill formation systems (as identified in Eastern Europe). We cover different geographical regions within Europe (North, South, West, East) and countries of different sizes. Furthermore, we aimed to look at different adult learning systems concerning their participation rates (high, medium, low) and the extent of involvement of the state and employers in funding and providing adult learning. Based on this consideration, we selected Austria, Germany, Italy, Norway, Bulgaria and the England (UK) out of the project's partner countries. Furthermore, we are currently exploring the opportunity to collaborate with researchers in North America and Asia to create additional, smaller case fiches for countries outside Europe⁵.

⁵ 3s is currently in contact with KRIVET, the Korean Research Institute for Vocational Education and Training, who have signaled potential interest to join the project as an associated partner and provide a case study on Korea for Work Package 2.

Table 1 Strategies selected within respective member state

Country	Skill formation	Adult learning	Region/ Population (million)	Strategies selected
DE	Collective	Education and training provides appropriate skills. Comparatively low participation	Central 82.8	1) Strategy for Lifelong Learning in the Federal Republic of Germany (2004) 2) Advancement through Education (2008 – 2015) 3) National Skills Strategy (2019 – 2022)
AT	Hybrid (Collective/Statist)	Education and training provides appropriate skills. Comparatively low participation	Central 8.8	1) Lifelong Learning Strategy for Austria (LLL) (2011 – 2020) 2) Qualification Plan Vienna (2013 – 2020)
NO	Hybrid (Statist/Collective)	Prevalent, often subsidised by the state	North 5.3	1) Strategy for Lifelong Learning in Norway: Status, Challenges and Areas of Priority (2006) 2) The Norwegian Strategy for Skills Policy (NKPS) (2017– 2021)
IT	Statist	Low participation, inequality in participation high	South 60.5	1) National Guidelines for Lifelong Guidance (2014) 2) National Guidelines for the Dual System of Training (2019)
BG	Transitional	Participation very low, inequality on participation quite high	East 7.1	1) National Strategy for Lifelong Learning for The Period (2008 – 2013) 2) National Strategy for Lifelong Learning For The Period (2014 – 2020)
UK	Liberal	Relatively widespread, unevenly distributed, mostly in-company training	West 66.3	1) Leitch Implementation Plan (2007) 2) Skills for Sustainable Growth Strategy (2010)

Note: Types of Skill Formation Systems taken from Busemeyer and Trampusch (2012); Nyen and Tønder (2020); Seitzl and Unterweger (2022); Tutlys et al. (2022); patterns of adult learning taken from by Boeren; Whittaker and Riddel (2017); Saar; Ure and Desjardins (2013).

The case selection strategy has also been chosen in order to allow for systematic comparison in *deliverable D2.3 which will be due in December 2024*. A preliminary outlook on these considerations is provided in the following. First of all, by using our cases as a “contrast of contexts” (Skocpol and Somers, 1980), this case selection should allow us to observe how designing strategic policy documents plays out differently depending on different skill formation systems, adult learning systems and wider political-economic contextual factors, with particular attention to potential variations in how these countries prioritize economic and/or social & personal/human development goals in their strategies. Second, through this selection, skills strategies can be systematically compared in order to isolate overarching key conditions for success in their implementation. On the one hand, we can compare cases where the foreseen actions and goals of skills strategies have largely been implemented, respectively the necessary conditions for success in implementation. This will be done by using “Mill’s Method of Agreement” respectively the “most different system design” (Ragin, 1989):

Despite the countries' differences with regard to several key characteristics mentioned further above, what are the common factors in the design of the national skills strategies that enabled the implementation of the strategy? On the other hand, the same strategy can be applied for national skills strategies with a less successful implementation process. In other words, what are the common factors that led to an only limited implementation of these strategies? In a complementary step, using “Mill’s Method of Difference”, we can also compare successful and unsuccessful skills strategies, therefore further facilitating the identification the key differences in design that led to success in implementation. These comparative strategies will be applied in the comparative report (D2.3).

Methods

Methodologically, we rely mainly on two approaches

- The majority of analysed data for this work assignment will result from desk research, most importantly an analysis of primary documents (the respective strategic policy documents themselves as well as available accompanying/monitoring reports), existing academic literature & applied research on the topic, and available information on the respective online presence of the responsible national authorities.
- Complementary semi-structured expert interviews (Hammer and Wildavsky, 1983; Leech, 2002; Mills; Durepos and Wiebe, 2010; Tansey, 2007) were conducted with national stakeholders in order to *fill gaps of knowledge that could not be addressed via desk research and to triangulate findings of desk research*. Country researchers tailored their questionnaires according to the extent of already gathered information in desk research and still existing gaps in knowledge, with focus on the latter; as well as the background of the respective interviewee and field of responsibility/expertise, with certain questions (e.g. on specific policy actions) only to be asked to individuals knowledgeable about them.

Some initial questions have been created based on the foreseen structure of the case study and the analytical framework (see annex), however, mostly serve illustrative purposes, as country researchers translated & tailored their questionnaires to their respective situation and context.

Interviewees include representatives of the main ministries involved in the respective skills strategies, social partners involved in (aspects of) skills strategies, and/or government agencies involved in respective skills strategies, experts particularly knowledgeable about respective skills strategies (e.g., academia, individuals involved in evaluations, etc.). If possible, at least one person per involved ministry/government agency were interviewed, and supplemented with information from independent experts. As interview participants for older strategic policy documents can be unavailable, focus has been applied on interview partners relevant for the more recent strategy selected. Furthermore, as the types of participants interviewed can vary across the different case study countries, the selection of participants also depends on which information is already available by means of desk research. Interview data gathered in this work package is therefore used as one source alongside other available information (e.g., primary and secondary documents and literature), with the various sources of information complementing each other and enabling triangulation (Beach and Pedersen, 2016a; Blatter and Haverland, 2012).

An informed consent form has been distributed alongside each interview invitation, lining out the purpose of the research, details of gathered data and how their data will be handled. It has been ensured that

- Experts were free to decide whether their names/the names of their organizations should be reported or should be anonymized
- When experts choose anonymity, personal information was removed in interview summaries, with names replaced by country abbreviation and two-digit code (e.g., AT04)
- Personal data collected was deidentified as soon as possible and will be stored only as long as needed

Case Studies

Austria

Authors: Eva Steinheimer, Günter Hefler (3s)

Box 2 Analyzed strategic policy documents for Austria

Code:	Analyzed strategic policy document:	Timeline:	Implementation:																											
AT1	Lifelong Learning Strategy for Austria 2020	2011 – 2020	Substantial																											
<p>Balance between economic and social & human/personal development aspects</p> <table border="1"> <caption>Data for AT1 Balance Chart</caption> <thead> <tr> <th>Category</th> <th>Economic aspects (Blue)</th> <th>Social & human/ personal development (Green)</th> </tr> </thead> <tbody> <tr> <td>Vocational education and training</td> <td>Left of center</td> <td>Right of center</td> </tr> <tr> <td>General and higher education</td> <td>Left of center</td> <td>Right of center</td> </tr> <tr> <td>Governance and coordination; stakeholder/social...</td> <td>Left of center</td> <td>Right of center</td> </tr> <tr> <td>Skills for life & skills to cope with structural transitions</td> <td>Left of center</td> <td>Right of center</td> </tr> <tr> <td>Information systems: Anticipating/forecasting skills needs</td> <td>Left of center</td> <td>Right of center</td> </tr> <tr> <td>Career guidance and validation</td> <td>Left of center</td> <td>Right of center</td> </tr> <tr> <td>Preschool and primary school education</td> <td>Left of center</td> <td>Right of center</td> </tr> <tr> <td>Labour market, workplace</td> <td>Left of center</td> <td>Right of center</td> </tr> </tbody> </table> <p>Legend: ■ Economic aspects (Blue), ■ Social & human/ personal development (Green)</p>				Category	Economic aspects (Blue)	Social & human/ personal development (Green)	Vocational education and training	Left of center	Right of center	General and higher education	Left of center	Right of center	Governance and coordination; stakeholder/social...	Left of center	Right of center	Skills for life & skills to cope with structural transitions	Left of center	Right of center	Information systems: Anticipating/forecasting skills needs	Left of center	Right of center	Career guidance and validation	Left of center	Right of center	Preschool and primary school education	Left of center	Right of center	Labour market, workplace	Left of center	Right of center
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AT2	Qualification Plan Vienna 2013 – 2020	2013 – 2020	Substantial																											
<p>Balance between economic and social & human/personal development aspects</p> <table border="1"> <caption>Data for AT2 Balance Chart</caption> <thead> <tr> <th>Category</th> <th>Economic aspects (Blue)</th> <th>Social & human/ personal development (Green)</th> </tr> </thead> <tbody> <tr> <td>Vocational education and training</td> <td>Left of center</td> <td>Right of center</td> </tr> <tr> <td>General and higher education</td> <td>Left of center</td> <td>Right of center</td> </tr> <tr> <td>Governance and coordination; stakeholder/social...</td> <td>Left of center</td> <td>Right of center</td> </tr> <tr> <td>Skills for life & skills to cope with structural transitions</td> <td>Left of center</td> <td>Right of center</td> </tr> <tr> <td>Information systems: Anticipating/forecasting skills needs</td> <td>Left of center</td> <td>Right of center</td> </tr> <tr> <td>Career guidance and validation</td> <td>Left of center</td> <td>Right of center</td> </tr> <tr> <td>Preschool and primary school education</td> <td>Left of center</td> <td>Right of center</td> </tr> <tr> <td>Labour market, workplace</td> <td>Left of center</td> <td>Right of center</td> </tr> </tbody> </table> <p>Legend: ■ Economic aspects (Blue), ■ Social & human/ personal development (Green)</p>				Category	Economic aspects (Blue)	Social & human/ personal development (Green)	Vocational education and training	Left of center	Right of center	General and higher education	Left of center	Right of center	Governance and coordination; stakeholder/social...	Left of center	Right of center	Skills for life & skills to cope with structural transitions	Left of center	Right of center	Information systems: Anticipating/forecasting skills needs	Left of center	Right of center	Career guidance and validation	Left of center	Right of center	Preschool and primary school education	Left of center	Right of center	Labour market, workplace	Left of center	Right of center
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Overview & context

In Austria, the development and adoption of strategic policy documents have become an increasingly prevalent move across various policy domains since the start of the new millennium. The development has been strongly fuelled by Austria's accession to the European union in 1995 as the development of strategies lies at the heart of the Open Method of Coordination, the key policy mechanism in all policy domain, where the Member States have broadly kept their exclusive say. Governance by strategic policy making has been the hallmark in areas such as the employment and education policy, with the emerging field of lifelong learning among its key fields of application. EU policy documents of all kinds, with Council Recommendations in particular beget strategies at the Member State Level. Overall, a crud mixture out of Austria's responses to EU policy prescriptions and a domestic appetite using policy strategies for a plethora of more or less legitimate goals have led to something which might be described as a "strategy inflation", with practically all actors involved in a multitude of processes simultaneously. It is commonly assumed that an overuse of policy strategy backing is undermining the effectiveness of this type of policy making per se, as any new strategy compete for attention and resources in an already saturated policy landscape.

Against this backdrop, it is even more essential that strategic policy processes are well designed, thereby maximizing their potential and avoiding pitfalls. The current contribution selects for analysis two strategic documents and their underpinning processes, namely Austria's Lifelong Learning Strategy issued in 2011 (*LLL:2020 Strategy*), responding to the EU level invitation to issue such a recommendation 10 years earlier as well as a strategy for improving the local qualification levels in Vienna (*Vienna Qualification Plan 2020, Qualifikationsplan Wien*), which origins can be traced back to the territorial employment pacts of the late 1990s. The Austrian LLL:2020 strategy had been selected as the most up-to-date and by far most comprehensive attempt to promote learning over the whole life span, thereby running into some of the most highly contested issues in Austrian politics. The Vienna Qualification Plan has been selected as an informative example for coherent regional policy making in the intersection of educational and employment policies, allowing also to discuss the paramount importance of the regional/federal state level in the Austrian Skill Formation/Adult Learning Systems.

Both strategies have been relatively successful, when assessed for what they have actually contributed to policy making, including what could be achieved prior to their adoption. However, both strategies have only partly reached their targets and remained particularly ineffective in fields known for their poor development. So, both, people seeing the glass half full or observing the glass half empty have many arguments on their side.

Existing literature on the analysis of these strategies is scarce. While they are poorly reflected in international academic literature, some national contributions on the LLL:2020 strategy can be mentioned (Lassnigg, 2010; Lassnigg, 2014; Lassnigg, Lorenz, 2020). For both strategies monitoring reports shed some light on the implementation (Hefler, Günter et al., 2018; Hefler, Günter et al., 2018; Hefler et al., 2019; waff (Wiener ArbeitnehmerInnen Förderungsfonds), 2016, 2017, 2018b). However, this case study will contribute to a more comprehensive view of Austrian policy strategies regarding their connection to the broader direction of skills policies and how they align with human capital or human capability approaches.

Strategic processes are understood as giving voice to multiple stakeholders, who in turn support the agreed-on goals by mobilising their particular competencies and funding sources. Cooperation is thought to be facilitated by SMART approaches (*Specific Measurable Achievable Reasonable Time-bound*) and routed in a philosophy of evidence-based policy making.

Strategies goals

The first steps⁶ towards the development of a Lifelong Learning Strategy in Austria were already set in the early 2000s in the aftermath of the EU Memorandum on LLL (2000)⁷. In a broad initiative carried by experts and stakeholders, the outline for a strategic document (ExpertInnengruppe, 2004) was developed in a consensual setting beyond the political arena (Lassnigg, 2014). In 2007, the Austrian social partners issued a strategic education programme with a focus on labour market relevance of reforms including quantitative indicators for assessing progress (Österreichische Sozialpartner, 2007). In an expert consultation process, the synthesis of the described initiatives was summarised in another paper published the following year stating many of the corner stones of the LLL strategy to be (Chisholm et al., 2009). Next, a ‘task force’ with representatives of the four core ministries in question (education, labour, economic affairs, and science) was set up under the newly built coalition government led by the social democratic party after seven years under a conservative-far-right coalition. Thereby, the debate was on the political level again, promoting the delayed publication of an LLL-strategy. At the same time the final strategy paper was limited in terms of far-reaching reform ideas and abolished some fundamental ideas of the expert consultation process. The original scope of suggestions was still wider, for example in respect to the role of non-formal not job related adult education and informal learning (Lassnigg, Lorenz 2020; Lassnigg, Lorenz, 2020).

⁶ See also table in Annex 1

⁷ However, the first overarching strategy was the LLL:2020 strategy published in 2011.

With the LLL:2020 Strategy, objectives, and measures for promoting lifelong learning were formulated in line with the guidelines chosen in European lifelong learning policy. Following a holistic perspective, the strategy addresses early childhood education, the development of primary and secondary education, support for transitioning from school to the labour market, adult education, and the attainment of qualifications in later life, general and vocational adult education, the higher education sector as a site for lifelong learning, workplace learning, company-based further education, and learning in the post-career phase. A specific focus is dedicated to the tasks of increasing permeability between different learning offerings and making learning outcomes visible and documenting them in a transparent manner. In total, 53 objectives and 70 specific proposed measures were organized into ten issue areas, which were intended to be implemented from 2012 to 2020. Additionally, statistical benchmarks were agreed upon for monitoring purposes.

The strategy was initiated by (at the time) four federal ministries, who dispatched representatives to a task force responsible for coordinating the strategy's implementation. A monitoring and reporting cycle was established for the strategy (annual presentation in the Council of Ministers), along with a planned final evaluation in 2020 (BMBF; BMASK and BMWFW, 2014, 2015, 2016; BMUKK et al., 2012, 2013; Hefler, Günter et al., 2018). To accompany the implementation process, a National Platform was established, which included representatives from other federal ministries and agencies, representatives from the Länder, representatives from interest organisations in the education sector, and representatives from social partners. Additionally, representatives from two research institutions were part of the platform.

In parallel, the perceived lack of policy coordination, particularly between regional Active Labour Market policies (largely represented by the regional office of the PES) and other policy domains crucial for lifelong learning, prompted the formulation of regional strategies related to lifelong learning across nearly all of Austria's *Länder* from 2010 onwards. In Vienna, the need to implement the Territorial Employment Pacts framework, rooted in the European Employment Strategy, played a significant role in driving policy coordination in the field of lifelong learning (Weishaupt, 2011). Starting from 1999, policy actors from various fields and spanning both national and regional policy levels had to reach consensus on supported measures as part of the TEPs. With the European Employment Strategy emphasizing supply-side measures, particularly in further training, the issue of lifelong learning gained prominence in regional policy coordination. Projects carried out under the TEP in Vienna facilitated inter-agency collaboration to address specific challenges and target specific groups. The waff (*Wiener ArbeitnehmerInnen Förderungsfonds*), a semi-autonomous agency frequently served as a facilitator in these

cooperative projects or participated as a formal player within the established frameworks.⁸

The Vienna Qualification Plan 2020 was initially introduced in 2012 by the waff (Wiener ArbeitnehmerInnen Förderungsfonds) (2013), with an ambitious framework for policy coordination aimed at promoting qualification programmes for individuals with low formal qualifications. Its objective was to significantly decrease the proportion of adults with low levels of formal qualification in the city of Vienna. The policy paper is structured into three main issue areas structured into 19 objectives and aligned with multiple measures. Quantitative indicators were matched with some of the objectives.

The strategic planning and execution of the Qualification Plan involve various organisations, including the City Council of Vienna, the waff, the regional PES, the Vienna Office of the Federal Office for Social Affairs and Disabled Persons, the Vienna School Board and the regional organisations of the social partners (Economic Chamber Vienna, Chamber of Labour Vienna, Federation of Industries Vienna, Austrian Trade Union Federation). Representatives from all these entities participate in a steering committee, which serves as a platform for discussing the ongoing implementation progress, addressing emerging challenges, and collaborating on further enhancements to the Vienna Qualification Plan. The waff plays a pivotal coordination role and is tasked with the ongoing evaluation of benchmarks, as well as overseeing the coordination of the monitoring process (waff (Wiener ArbeitnehmerInnen Förderungsfonds), 2016, 2017, 2018b). In 2018, it was decided to continue this initiative as the Vienna Qualification Plan 2030, with plans to release updates every three years along with regular annual monitoring reports (waff (Wiener ArbeitnehmerInnen Förderungsfonds), 2018).

Table 2 Main characteristics of the compared strategic documents

	LLL:2020 Strategy	Vienna Qualification Plan 2020
Date of publication	2011	2012
Involved stakeholders	4 ministries ('Task Force' as coordinator) Within the National Platform (social partners, PES, Länder, municipalities, HE and adult education institutions, researchers)	waff (coordination) city council of Vienna, social partners, regional PES, municipal social office, municipal education authority, guidance and education providers
Policy areas addressed	Education over the lifespan: elementary education, initial school education, transition from school to work, adult basic education, second chance education, CVET, workplace learning, community education, learning in the	Labour market and employment policies, IVET and CVET, focus on hindering school drop-outs and on supporting low-skilled adults

⁸ The waff, as an entity, exemplifies a (semi-)autonomous agency according to Pollitt (2004). It carries out the directives of the political executive, in this case, the Vienna city government (*Landesregierung*), as well as other administrative units like the Vienna Public Employment Service, with a notable level of independent decision-making and authority.

		post-occupational phase, guidance and validation, etc.	
Influence level	European	EU LLL Memorandum, Lisbon strategy, Europe 2020	Territorial Employment pacts rooted in the European Employment Strategy
Preceding national/regional discourses		Expert and stakeholder networks Social partner paper Consultation process	Vienna youth guarantee
Monitoring, mechanism	updating	Annual monitoring until 2018, unpublished pre-evaluation, no final evaluation, no updating mechanism	Annual reports, in 2018 introduction of regular updating of work programme under the new title Vienna Qualification Plan 2030
Follow-up documents	strategic	No similarly broad strategy document after that (yet, announced in the current government programme) Various strategies covering certain aspects (e.g., validation, early school leavers, social dimension in HE)	Vienna Qualification Plan 2030 (2018)

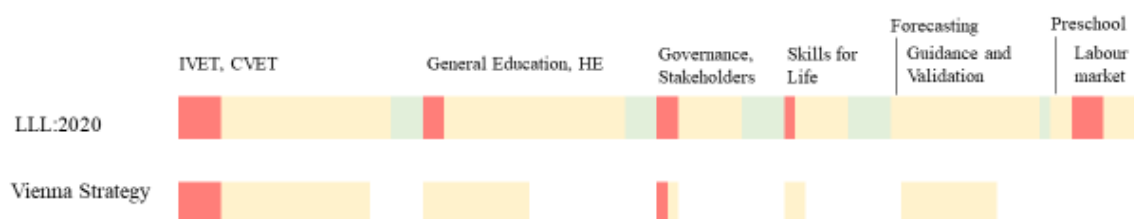
Source: Own description

One distinctive feature of the LLL:2020 Strategy lies in the layered structure of the document, which encompasses several cross-cutting themes. The ten substantive issue areas (*Aktionslinien*, literally ‘lines of action’) are not only linked to 13 goals (*Strategische Ziele*, literally ‘strategic objectives’) with subordinate quantitative benchmarks, but also subject to the four fundamental principles of Gender & Diversity, Equal Opportunities and Social Mobility, Quality and Sustainability, as well as Efficiency and Innovation. The formulation of these principles clearly demonstrates the coexistence of economic and social objectives: ‘Equal opportunities for children and learners are a core task of democratic of democratic politics and will enable fair opportunities for advancement. Equal opportunities are also an economic necessity to be able to make use of all potentials.’ (*general principle, p 10*). This emphasis is rhetorically underscored in the introductory sections preceding each substantive chapter, titled ‘Vision’ where the respective policy areas are outlined in an aspirational future context.

On the level of the issue areas, the emphasise on social and/or economic goals differs. There is a strong emphasis on equal opportunities in issue areas addressing elementary and school education as well as adult basic education. A broad understanding of “functionings” of skills (see general introduction) can be detected in the issue areas on community education and learning beyond retirement age, two of the parts of the strategy where the lifelong – respectively life accompanying as in the German title – learning understanding beyond goals of employability and material security are strongest. The holistic perspective was meant to strengthen the policy areas with ‘weaker’ representation and support in general debates, that are often those addressing

capabilities. The weak point in the strategic process, however, was the missing link to (extra) budgets foreseen for the proposed measures; stakeholders were meant to pursue the goals based on existing resources leaving little leeway to increase activities.

Figure 2 Objectives of the LLL:2020 Strategy and the Vienna Qualification Plan 2020 representing mostly economic (red), both economic and social (yellow) and social goals (greens)



Source: Own description based on the detailed analysis of the two strategies in the analytical framework

The focus of the regional skills strategy for Vienna is narrower and centres on three main issue areas: supporting young people in their initial education to attain qualifications beyond compulsory schooling, promoting the upskilling of individuals with limited formal qualifications, irrespective of their labour market status, and expanding career information and guidance services for those with low qualifications.

Of key importance within the Viennese context, are the strategic goals under the issue areas to support young people in initial education on a pathway beyond compulsory schooling and to implement the Vienna vocational training guarantee (*Wiener Ausbildungsgarantie*). The guarantee was introduced in 2010 integrating several measures with the goal to support disadvantaged young people and avoid youth unemployment. The Austrian apprenticeship system with its combination of work-based learning in a company with school-based learning spells is crucial for youth employment policies. In recent years, Vienna has faced a steep decline of available regular apprenticeship places where employers provide the practical training and pay the apprentices' wages. So, that important root for young people into the labour market became increasingly unavailable for young people living in Vienna. In addition to the role out of a new transition system for young people after completing compulsory schooling (*Übergangssystem*) on national level, mainly based on supra-company apprenticeships (*Überbetriebliche Lehrausbildung*), Vienna started to strongly invest on its own into the emerging system of alternative apprenticeship pathways and vocational opportunities for young people who are not continuing school-based education on upper secondary level, yet, could not find a regular apprenticeship. Vienna's Vocational Training Guarantee covers all opportunities that help young people to obtain a qualification beyond compulsory level. The target group are all young people in Vienna with a completed compulsory school certificate until the age of 21 (25 for youth with disabilities). There is a strong alignment of policy objectives between the national and regional strategy discussed in this chapter regarding youth policies.

The second major issue area focusses on the promotion of adults without formal qualifications regardless their employment status in upskilling. Support to improve basic skills and to catch up on missed opportunities to gain qualifications is complemented by improvement of guidance, recognition of qualifications gained abroad and validation of non-formally and informally acquired competences. For these objectives again, a strong cohesion with the goals of the LLL:2020 Strategy can be detected. The objectives are each linked to highly specific measures, in contrast to the LLL:2020, where the connection between objectives and measures often remains vague. While the emphasis of the Vienna Qualification Plan is clearly on improving employability of targeted groups, personal development goals are implicitly part of many measures. Topics such as promoting democracy or participation are not addressed or are understood to lie outside the scope of the strategy's direction.

Indicators, actions and implementation

The comprehensive groundwork and implementation of the LLL strategy have firmly established a holistic perspective on lifelong learning in Austria and significantly strengthened cooperation between different policy areas and levels. Particularly before and immediately after the adoption of the strategy, important political impulses emanated from the strategy process, which were reflected in a large number of subsequently realised initiatives. The overall architecture of the strategic document, with its combination of visions, objectives, and concrete proposed measures, is also a strength, as is the establishment of an inter-ministerial task force for guidance and the integration of accompanying monitoring for strategy implementation. For the monitoring of the strategy, ten quantitative benchmarks had been agreed upon, which in combination should reflect the progress in lifelong learning. In total, six of the benchmarks set could be achieved by 2020. An analysis shows that, for various reasons, the indicators as a whole can only give a realistic impression of progress in LLL policy to a limited extent. Of the ten indicators, only three appeared to be well suited to measure progress in the intended way, five only conditionally suited and two not suited. Progress in reducing inequality of educational opportunities is only insufficiently observed by the chosen indicators⁹. In particular, the monitoring did not provide a sufficiently informative overall picture of the progress achieved or not achieved with regard to lifelong learning. (Hefler et al., 2019)

⁹ An example is the participation of low-skilled employees in corporate training which was intended to be increased from 5.6% (AES 2007) to 15%. While the benchmark was already reached in 2016, the indicator is only partly suited to explain if the access of low qualified to corporate training has actually been improved. An increase can also be observed when compulsory training measures (e.g. safety training) are implemented. Furthermore, the indicator is not suited to describe how the overall possibilities for upskilling for the target group are developing.

Due to the breadth of the strategy, which addressed all areas of education and life phases, limitations arose during the implementation process, as only a selection of issues could mobilise the necessary efforts and collaborations. The construction and assignment of tasks to the body accompanying the strategy implementation (*National Platform*) were found to be ineffective as the contribution of the stakeholders dropped over time and the high commitment from early phases could not be held up. Further weaknesses included a weak connection to the policy processes and funding logics of the European Union, as well as insufficient consideration of the crucial level of the Austrian federal states for many areas of action. The financing mix for the planned measures was inadequately clarified. The long duration of the strategy without designated update points emerged as a significant shortcoming, contributing to a marked decrease in the effectiveness of the strategy process over time without any adaption to changing frameworks. Apart from an initial phase, successful policy processes could only be initiated in connection with the strategy if they stemmed from the current priorities of the involved ministries - the binding nature of the strategy itself was low.

Overall, the LLL:2020 Strategy has satisfactorily fulfilled its mission of anchoring a holistic perspective on lifelong learning in Austria, bringing the focus to the design of transitions in educational and learning processes, and raising awareness of the need for collaboration across policy boundaries. Significant progress, especially in the design of educational transitions and the participation of adults in education between 2010 and 2018, was made possible by the mobilization and coordination effect generated by the strategy. Important recent focal points of LLL policy - such as digitization or the integration of migrants, especially refugees - are inadequately prepared in the strategy and require reintegration into its holistic perspective.

Significant parts of the measures outlined in the strategy have been implemented, albeit to varying degrees. Many measures have led to the creation of long-term processes or enduring structures that sustainably support the strategy's objectives. Among the most important implemented measures recommended by the strategy are the nationwide expansion of youth coaching and lifelong guidance, the establishment of free adult basic education offerings and preparation for gaining a compulsory schooling certificate (*Initiative for Adult Education*) (Hefler and Steinheimer, 2019), further expansion of educational leave options for part-time studies, and the introduction of the skilled workers' grant.¹⁰ Development processes with important cross-connections to the strategy include the National Strategy for Preventing Early (Educational) Dropouts (2012/2016) and the framework *Ausbildung bis 18* (2017) introducing mandatory

¹⁰ For more on the last two see Cedefop's Financing Adult Learning Database: <https://www.cedefop.europa.eu/en/tools/financing-adult-learning-db>

participation in education or training until the age of 18 with accompanying support structures, the National Strategy for the Social Dimension of Higher Education, the development and implementation of the National Qualifications Framework, and the development of the Strategy for Validating Non-formal and Informal Learning (2017).

For certain measures or areas of responsibility, little or no progress has been made during the current duration of the strategy. Important examples include the failure to establish a federal framework law for pre-schools and the nationwide, needs-based expansion of day-care facilities for infants as well as school children. There are still no harmonised public funding offers for formal educational steps beyond compulsory schooling in adulthood. Little progress has been made in promoting (informal) workplace learning. Similarly, no significant progress has been achieved in promoting community education and learning in the post-career phase. Many of the tasks where little progress has been made require broad coalitions of different political actors and substantial financial investment both in the preparation and implementation of the initiatives which were not given under the umbrella of the LLL:2020 Strategy; instead, new alliances would need to be formed around each individual issue, which have not lost relevance in themselves. However, it can be said that little progress could be achieved concerning social/human development goals that were only stated as general principles or visions for the future.

Table 3 Comparison of SMART characteristics of the two strategic documents

	LLL:2020 Strategy	Vienna Qualification Plan 2020
Specific	Varying degree of precision in goal formulation; distinction between goals and measures, yet no direct link for all items	Goals are clearly formulated and linked to specific measures (ongoing or to initiate)
Measurable	Set of quantitative indicators, partly suitable to demonstrate process with respect to goals	Quantitative indicators for all three topic lines, partly under development
Achievable	Varying between issue areas, not all issue areas receive (additional) budgets, not all stakeholders have liable	To a high degree, close to already ongoing processes, unforeseen external events can be disruptive
Relevant	Most goals were highly relevant at the time of negotiation,	Highly relevant
Time-bound	Timeframe for overall strategy: 2020. Annual monitoring. No timeframe for implementation steps.	Timeframe for overall strategy: 2020. Annual monitoring. Switch to a three-year-midterm cycles in follow up Qualification Plan 2030

Source: Own description [preliminary representation, may be shortened]

For the Vienna Qualification Plan 2020 goals were clearly formulated and explicitly linked to specific measures including ongoing programmes, projects and initiatives as well as new measures to be set up. The Vienna Qualification Plan 2020 stressed the importance

of evidence-based policy making and defined quantitative benchmarks, which included (among others)

- a) Reduction of the share of young people leaving school after nine years of compulsory schooling not continuing education or training from 9% (2008/09) to 7% (2020)
- b) Reduction of the share of Early School Leavers from 11,8% (2009) to 8,1% (2020)
- c) Increase of number of external apprenticeship examination from 2244 (2011) to 3590 (2015) redefined to 2330 (2017)

The ESL indicator was also used by the LLL:2020 Strategy. There were no overlaps for the remaining chosen indicators, however, no contradictions in set qualitative goals for the dimensions being part in both strategies can be observed. The annual monitoring reports for the Vienna Qualification plan have shown that progress could be made for the majority of indicators, whereas some benchmarks were out of reach due to contextual changes – with the consequences of the large influx of refugees from the year 2015 onwards as an important explanation (waff (Wiener ArbeitnehmerInnen Förderungsfonds), 2018b). Against the backdrop of the ongoing changes with regard to demography, migration, digitalisation and changing skill demands in the labour market, the organisations supporting the strategy have agreed on a renewed version of the strategy in Spring 2018, the Vienna 2030 Qualification Plan (waff (Wiener ArbeitnehmerInnen Förderungsfonds), 2018a).

The main objective has kept constant, helping low qualified adults to acquiring higher levels of qualifications and skills. Mechanisms for setting benchmarks has deliberately changed, opting for newly defined benchmarks every third year, as the experience had shown that due to the highly volatile environments (in particular, with regard to immigration), benchmarks may need adaptation to remain realistic (waff (Wiener ArbeitnehmerInnen Förderungsfonds), 2018a) which was proven at several occasions since then as for example the distortions in the aftermath of the pandemic.

The clear linkage between set goals and explicit measures can be considered one of the main strengths of the strategy's setup. Together with the broad process that advanced the publication of the strategy with involvement of all key stakeholders the concreteness of the actions to take and the yearly monitoring supported deepened cooperation and strengthened the long-term commitment. Periodic meetings of members of a steering board with leading representatives of all stakeholders worked as a forum where the activities were followed but also brought decisions makers together. This board is still active in the follow-up period of the strategy and a renewed working plan for the years 2024-2027 is expected to be published in spring 2024. The Vienna Qualifications Plan has become a respected institution and the partners still engage in the implementation and

further development of the measures, although the initially effective public presence of the strategy has somewhat faded over the years.

Progress can be observed in all three issue areas and the implementation of a few major activities together with several smaller complementing measures has advanced. In the issue area targeting young people the regional support network has been expanded alongside the implementation of national policies (see above, *Ausbildung bis 18*). In the issue area for promoting the upskilling for low-qualified adults, efforts have been made to increase offers of basic education, the acquisition of an apprenticeship exam for adults (supported by demand side funding instruments (*Chancen-Scheck*)) and to support the recognition of qualifications gained abroad as well as the validation of prior learning (for example in the pilot measure *Meine Chance – Ich kann das!*). An initiative that was started through the tightened coordination by the Vienna Qualification Plan was the introduction of an instrument to document prior qualifications and competences, work experience and steps taken for further training (*Qualifikationspass*) that can be used across organisations (PES, waff, providers). This instrument shall be ensured that an individual gets continuous support regardless their labour market status and thereby at least partly lessen the effects of divided responsibilities.

The final issue area addressing career information and lifelong guidance for the target groups of the Vienna Qualification Plan has initiated innovative forms of outreach including a framework for coordinating outreach activities (*Wiener Wochen für Beruf und Weiterbildung*) and events of a broad set of organisations throughout the city and active in different subfields in support and guidance (youth, adults, migrants, women etc.).

Bulgaria

Authors: Veneta Krasteva, Svetlana Alexandrova, Pepka Boyadjieva & Petya Ilieva-Trichkova (Institute of Philosophy and Sociology at the Bulgarian Academy of Sciences)

Box 3 Analyzed strategic policy documents for Bulgaria

Code:	Analyzed strategic policy document:	Timeline:	Implementation:
BG1	National Strategy for Lifelong Learning for The Period 2008 – 2013	2008 – 2013	Limited
Balance between economic and social & human/personal development aspects			
<p>Legend: ■ Economic aspects ■ Social & human/ personal development</p>			
Code:	Analyzed strategic policy document:	Timeline:	Implementation:
BG2	National Strategy for Lifelong Learning for The Period 2014 – 2020	-2014 – 2020	Limited
Balance between economic and social & human/personal development aspects			
<p>Legend: ■ Economic aspects ■ Social & human/ personal development</p>			

Overview & context

Bulgaria has a long tradition of adult education dating back to the late 19th century, when Sunday schools were active (Boyadjieva et al., 2013; Boyadjieva, 2018). During the time of communist rule (1944–1989), adult education was carried out in evening schools; there was also a system of well-developed vocational schools. After 1989, this system underwent significant changes, the result of a sharp drop in industrial production in the country due to the closure of scores of enterprises and factories. Whole industries were declining, which also affected the professions connected with them, culminating in the closure or restructuring of a series of technicums and vocational secondary schools.

Bulgaria still has the lowest participation among adults in education and training: 1.7% against an EU average of 11.9% for 2022, a tendency that not only failed to improve over the last decade but also slightly dropped from 2% in 2013 (Eurostat)¹¹. This low participation in adult learning is the main challenge confronting skills and LLL policies in Bulgaria (Boyadjieva, 2023). Their realisation depends largely on effective collaboration and cooperation between all stakeholders. To cite Hall and Soskice (2001: 46), this mutual process is on one hand dependent on the availability of appropriate social organisations and on the norms and institutions which support this collaborative effort on the other. Through the creation of strategic documents for LLL, the government has presented a formal framework as well as the regulations through which this collaboration can take place in order to accomplish the set objectives.

The country was one of the first to participate in the process of consultations in developing the Memorandum on Lifelong Learning since 2000. Up until Bulgaria's European Union (EU) accession in 2007, various (uncoordinated) strategic documents on education and instruction were drafted separately by state institutions, which also carried out several projects in this direction. However, the strongest impetus for the development and application of concrete policies regarding lifelong learning (LLL) over the last 15 years in Bulgaria belongs to the EU and its recommendations, given due to the need for reforms and evolution in this sphere. Since 2007 a number of policy documents have constructed a very broad normative framework linked directly or indirectly to LLL in Bulgaria.

The documents chosen for analysis in the present case study are the most consistent with the stated understanding of strategic policy documents in the field of LLL: the

¹¹ Eurostat. (2023). Participation rate in education and training (last 4 weeks) by sex, age and educational attainment level, code: trng_lfs_02, available at: https://ec.europa.eu/eurostat/databrowser/view/TRNG_LFS_02_custom_6633206/default/table?lang=en.

National Strategy for Lifelong Learning 2008–2013 (NSLLL 2008–2013) and the National Strategy for Lifelong Learning 2014–2020 (NSLLL 2014–2020). Both documents are directed toward overcoming the challenges associated with the dissemination and application of the lifelong learning concept and contribute to enhancing Bulgarian citizens' potential in harmony with the skills and key competences defined by the EU.

Strategies goals

There had been efforts and activities in the field of LLL prior to Bulgaria's EU accession, but they lacked synchronisation between institutions and were therefore quite fragmented. At the start of preparations for the NSLLL 2008–2013, another process began: *“synchronisation of actions and developing a single document, not fragmented documents, on the part of institutions”* (expert 2). The experts (experts 2–5) underline that the establishment of these LLL strategies under the influence of European policy and the unified approach represents consolidated efforts among various institutions and the creation of a cohesive environment for education, training and LLL: *“[o]n the basis of these strategies, we can see who are the responsible institutions. That is the main goal. This strategy should unify the efforts of all institutions connected with the problem”* (expert 5). A common space has been created through these strategies, one in which LLL actions are normatively and financially secured and the efforts of all stakeholders are united. According to the experts (expert 2), a top-down approach can be seen through those objectives which are external and perhaps novel for Bulgarian social attitudes, as well as institutionalised automatic transfers of ideas in the attempts to reach national targets.

The NSLLL 2008–2013 indicates that its creation was dictated by the necessity for the results of the Bulgarian education system to become synchronised with standard skills and competences as in the other member states of the EU and for Bulgarian citizens to be prepared to participate in the common European and global economy. The process of preparing the first Strategy for LLL, as confirmed by the interviewed experts (expert 2, expert 3), began as an effort to grapple with the country's socio-economic struggles — a high unemployment rate, especially among disadvantaged groups on the labour market; a shortage of workers with the qualifications and skills sought by employers; a need for improving the quality of education and instruction; a mismatch between labour supply and demand; and seriously lagging indicators for education and training compared to EU levels. Concurrently, both strategies needed to respond to a mass of problems relating to adult participation in lifelong learning activities, striving to embrace the entire life trajectory of the individual (expert 6).

These efforts came about due to the severity of the problem, which is assumed in the policy discourse to be largely solvable through the implementation of LLL measures, particularly by increasing the number of workers with those professional skills and qualifications being sought by employers. Experts note that the national objectives for the two periods covering both strategies were set on the basis of European strategic goals (expert 6). The NSLL 2008–2013 notes that LLL in Bulgaria is seen as an instrument contributing to the achievement of one shared European objective: for the European Union to become “the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion” (NSLLL 2008–2013: 4). In the NSLLL 2014–2020, the increasing deficit of workers who possess the necessary qualifications is viewed as a significant impediment to economic growth and attracting new investments in Bulgaria (alongside an ageing population and slow-paced educational reforms) (NSLLL 2014–2020: 3).

The first strategic document, NSLLL 2008–2013, was accepted more than a year after Bulgaria’s EU accession in 2007. Its preparation was influenced greatly by the European Union’s call for member states to create coherent national strategies for lifelong learning. The main vision of the NSLLL 2008–2013 is: “[b]y 2013, to reach a significant increase in Bulgarian citizens’ participation in lifelong learning, to provide them with free access and conditions for training in order to develop as individuals responsible to themselves and society, using the possibilities of modern knowledge” (NSLLL 2008–2013: 7). The objective pursued by the strategy is: “provide all Bulgarian citizens with the conditions to develop their personal and professional knowledge, skills and abilities to improve their own well-being as well as the national economy”.

The main problems identified in the NSLLL 2008–2013 are:

- weak participation among Bulgarian citizens in adult education (in 2007, when the strategy was developed, a mere 1.6% of the population ages 25–64 had participated in lifelong learning (Eurostat data)¹²;
- need for the legal framework to be adapted to current European LLL priorities;
- issues with the regulatory framework regarding adults’ access to education and training, as well as the recognition of informal learning and independent study;
- lack of systematised information about the various training courses available and their admission requirements;
- not enough effective coordination between participants in the process of adult education at the national and regional levels;

¹² Eurostat. (2023). Participation rate in education and training (last 4 weeks) by sex, age and educational attainment level, available at: https://ec.europa.eu/eurostat/databrowser/view/trng_lfs_02_custom_8320588/default/table?lang=en.

- a learning environment lacking sufficient stimulation in terms of modern infrastructure and unresponsive to the need for continuous improvement of knowledge and skills;
- inadequate geographic and financial distribution of educational and training institutions;
- poor quality and ineffectiveness of lifelong learning and a need to update educational content;
- mismatch between continuing vocational training and labour market needs;
- lack of transparency and recognition of qualifications;
- strong influence of the socio-economic environment on participation in various forms of lifelong learning.

The second strategy (NSLLL 2014–2020) was accepted in early 2014 and, as expected, perceived as a response to all the emerging challenges in regard to social inclusion and economic growth. Like the first strategy, this one was influenced by European trends and the EU Memorandum on LLL 2000, whose definition of LLL was adopted in the strategic document. But the strategy was also influenced by European efforts to achieve smart, sustainable and inclusive growth. The main vision pursued by the 2014–2020 strategy is: “[b]y 2020, for Bulgaria to be a country where conditions have been created for the full creative and professional success of the person and where access to various and quality forms of lifelong learning has become a reality for all its citizens” (NSLLL 2014–2020: 18).

These are the main problems to be solved as laid out in the NSLLL 2014–2020:

- lack of consistent qualifications systems to match new economic processes;
- disjointed approaches to structuring, statutory support, governance and organisation in the national education and training system;
- low participation in LLL and adult education and an underdeveloped continuing education system — in 2013, when the strategy was developed, only 2% of the population aged 25–64 were involved in lifelong learning (Eurostat data), a level that had increased since 2007 but still represented the lowest (with Romania) in the EU;
- the vocational education and training system in Bulgaria still cannot provide the necessary knowledge, skills and competences demanded on the labour market;
- shortage of workers with needed qualifications (Informatics, Technical Equipment, Manufacturing and Processing, and Architecture and Construction);
- need for reforms in the education and training system to respond to the rapid spread of new technologies;
- need for enhancing the quality of school education and training towards attaining key competences;

- upgrading the professional qualification of teaching staff;
- high level of early school leavers (in 2013, when the strategy was adopted, 12.5% of Bulgarians aged 18–24 had left the education system immediately after or before lower secondary education and were not involved in further education or training);
- insufficient coverage of children enrolled in “early childhood learning”;
- large share of students with low test results on the PISA scale (OECD, 2012);
- need for modernisation of higher education;
- underdeveloped systematic training of workers and employees by employers, especially among small- and medium-sized enterprises;
- limited access to LLL among disadvantaged groups, primarily older workers and employees, people with low skills, those from the Roma community and disabled people.

Indicators, actions and implementation

Actions

The priorities set out in the NSLLL 2008–2013 follow European trends and include: access to lifelong learning and expanding educational and training opportunities; resources to acquire and improve key competences; activating social partners to participate in the LLL process; validation and certification of non-formal learning and independent study; high quality of education and training and access to information; quality information, guidance and counselling services; support for social inclusion; training of trainers (NSLLL 2008–2013: 6). These priorities are grouped into two priority areas:

- Improving opportunities for access to lifelong learning
- Ensuring the quality and effectiveness of lifelong learning.

The concept of LLL in NSLLL 2008–2013 is based on two groups of competences that interact and can be mastered simultaneously or separately. These are vocational and key competences. Vocational ones relate to the skills needed for a job. Key ones are defined as “a factor for improving each person’s individual development, active citizenship and social inclusion, as well as increasing their mobility and motivation” (National Strategy for Lifelong Learning 2008–2013: 6). Eight key competences defined in EU countries are accepted: Bulgarian language competence; foreign language communication skills; mathematics competence and basic competences in the area of natural sciences and technologies; learning skills; social and civic competences; proactivity and enterprise; cultural awareness; and skills for expression through creativity. The second NSLLL 2014–2020 also adds skills in support of sustainable development and healthy lifestyles.

The main priorities set out in the NSLLL 2014–2020 are: a new educational approach which supports the development of all learners and contributes towards the development of thinking, capable and proactive individuals able to handle changes and uncertainty; improving the quality of education and training; ensuring an educational environment with equal access to lifelong learning, active social inclusion and active civic participation; promoting education and training aligned to economic needs and labour market changes. It can be seen that the priorities in the second strategy have been expanded and attention is paid to the need for actions to improve equal access to lifelong learning as well as active social inclusion and civic participation.

The NSLLL 2008–2013 has a narrower scope, even though it defines ten areas of impact. It includes actions related to secondary education (vocational and general), higher education, adult lifelong learning and the validation of results. The areas of impact are:

1. Modern educational requirements
2. Vocational training in the context of lifelong learning
3. Workplace training
4. Key competences in the context of lifelong learning
5. Training teachers, trainers and academics
6. Lifelong guidance
7. Recognition of qualifications
8. Assessment of learning outcomes
9. Scientific research for lifelong learning
10. Funding for lifelong learning

The NSLLL 2014–2020 covers a broader scope of action; the document addresses pre-school education and training, general school education, vocational education and training, higher education, continuing adult education, validation of non-formal learning outcomes and self-directed learning. The strategy defines eight areas of impact:

1. Ensuring the conditions for transition to a functioning system for lifelong learning
2. Ensuring the conditions for expanding the scope and enhancing the quality of preschool education and training
3. Applying a comprehensive approach to enhancing educational achievements and reducing the share of early school leavers
4. Enhancing the quality of school education and training towards the attainment of key competences; improving learners' achievements and personal development
5. Increasing the attractiveness and improving the quality of vocational education and training to ensure employment and competitiveness
6. Modernising higher education
7. Developing opportunities for non-formal and informal learning for personal and professional development; new resources for better quality of life following the end of one's working career

8. Coordinating interaction among stakeholders in the implementation of lifelong learning

In contrast to the first strategy, the NSLLL 2014–2020 accentuates the relationship between LLL and the labour market, adding the concept of employability. Along with this, space is allocated in both the impact areas and priorities of the second strategy for improving learners' achievements, personal development and opportunities for personal and professional progress. The second strategy also talks about the importance of volunteering and the need to encourage it among young people and other citizens. The importance of interaction among stakeholders in the implementation of lifelong learning policy is also emphasised.

Table 4 Main characteristics of LLL Strategies in Bulgaria

Name of document	NSLLL 2008–2013	NSLLL 2014–2020
Date of acceptance	30-10-2008	10-01-2014
Involved stakeholders	The MES is the lead initiator, the MLSP leads in adult education; public consultation among stakeholders	A wide range of state institutions — ministries and agencies; unions, employer organisations, NGOs, academic institutions
Policy areas addressed	Secondary education, higher education and adult lifelong education, validation and certification of formal and informal learning, independent study	Pre-school education and training, general school education, vocational education and training, higher education, continuing adult education, validation of non-formal learning and independent study, early school leavers, interactions with stakeholders, building a coordinated national education and training system to ensure diverse learning paths
European-level influences	European recommendations and trends, EU Memorandum on LLL, Lisbon Strategy	Europa 2020, European trends, EU Memorandum on LLL

Preceding national discourses	The European Memorandum on Lifelong Learning of 2000	EU LLL policy; labour market needs; social partner networks
Monitoring & updating mechanism	Strategy action plans	National Coordinating Group for Lifelong Learning; annual action plans for the Strategy; multi-level coordination and process monitoring through the National Lifelong Learning Platform 2020; annual plans and status reports to the Council of Ministers
Follow-up strategic documents	2014–2020 Strategy	The Strategy for LLL 2021–2027 has yet to be developed, but LLL is one of the priorities within the Strategic development framework for education, training and learning in the Republic of Bulgaria (2021–2030)

Source: based on the model developed by Steinheimer & Hefler

An analysis of the state of play, objectives and specific activities is presented for each area of impact. The specific measures, implementing actors, funding and implementation period are specified in the strategies' implementation plans. Two two-year plans were drawn up for the first strategy; they were annual in the second strategy. Some of the main characteristics of both LLL Strategies are summarized in Table 1.

Indicators

The interviewed experts (expert 2 and 3) consider the objectives and actions of both strategies to be similar, although the second one is expanded and comprises more goals and, accordingly, a larger number of indicators for achieving them.

The main objectives set in the NSLLL 2008–2013 are:

- Increase participation in lifelong learning among the population aged 25–64 from a rate of 1.3% in 2007 to 5% in 2013;
- Reduce the share of early school leavers from 16.6% in 2007 to 12% in 2013;
- Increase the share of persons aged 20–24 who have completed secondary education from 83.3% in 2007 to 85% in 2013.

The NSLLL 2014–2020 defines the following strategic objectives, with specific indicators of progress indicated for each of them:

- Increase the share of the children covered by preschool education and learning from age 4 until first grade enrolment from 87.8% in 2012 to 90% in 2020;
- Reduce the share of early school leavers aged 18–24 from 12.5% in 2012 to under 11% in 2020;
- Reduce the share of 15-year-olds with poor achievements¹³ in: reading — from 39.4% in 2012 to 30% in 2020; in mathematics — from 43.8% in 2012 to 35% in 2020; and in natural sciences — from 36.9% in 2012 to 30.0% in 2020;
- Increase the share of those attaining professional qualification degrees in the broad areas of Informatics, Technical Equipment, Manufacturing and Processing, and Architecture and Construction to at least 60% in 2020;
- Increase the share of those aged 30–34 who have completed higher education from 26.9% in 2012 to 36% in 2020;
- Increase employment rates among the population aged 20–64 from 63% in 2012 to 76% in 2020;
- Increase participation among the population aged 25–64 in education and training from 1.5% in 2012 to over 5% in 2020 (4-week reference period);
- Reduce the share of illiterate persons: among those aged 15–19 from 2.0% in 2011 to 1.5% in 2020; and among those aged 20–29 from 2.3% in 2011 to 1.5% in 2020 (NSLLL 2014–2020: 18–19).

To assess the achievement of the set objectives, frameworks of measurable indicators have been defined, with 11 indicators in the 2008–2013 strategy and 14 in the 2014–2020 Strategy. Unlike the first strategy, in which the indicators only refer to the field of education, the second strategy also includes the labour market (relating to the employment of persons in the 20–34 and 20–64 age groups).

Implementation

The NSLLs do not provide for a monitoring mechanism towards implementation of the defined objectives and priorities. An impact assessment was made in 2012, by order of the Minister of Education and Science. According to the results of this evaluation, there were 23 (36%) measures related to the first priority of the 2008–2013 strategy (improving access to LLL), and there were 41 (64%) referring to the second priority (ensuring quality and efficiency of LLL), with a total of 64 measures. Of these, 31 (48%) were carried out and 33 (52%) were unfulfilled by the end of 2011.

Regarding the first priority area, the same evaluation reports that 15 out of 23 measures were implemented through the following actions: creating a stimulating learning

¹³ Having scored lower than the critical second level for literacy as per the Programme for International Student Assessment (PISA) of the Organisation for Economic Cooperation and Development.

environment to keep students in school, improving the educational infrastructure and building an accessible architectural environment (Ministry of Education and Science, 2012: 21). Literacy training programmes and key competence acquisition programmes were implemented; increased training opportunities, traineeships and apprenticeships were offered to jobseekers; and projects aimed at increasing the attractiveness of vocational education were also carried out.

With regard to the second priority of the NSLLL 2008–2013, the experts report that 16 out of the 41 total measures were implemented (Ministry of Education and Science, 2012: 22). The actions taken were: development and adoption of a National Qualification Framework; providing additional training for students; the enhancement of admissions examinations for HEIs; updating the register of vocational education and training; improving teachers' qualifications; training employees and unemployed persons; provision of internships for young people, etc.

The National Strategy for Lifelong Learning (NSLLL) 2008–2013 concludes that attainment of the outlined strategic objectives was uneven, with the most significant shortfall observed for the first — increasing participation in Lifelong Learning (LLL). The second objective was nearly achieved, while the third objective was exceeded. In Table 5 the strategic objectives of both strategies are presented.

Table 5 Key objectives and achieved results for the NSLLL 2008–2013

Objectives	Objectives for 2013	Results as of 2013
Enhancing LLL participation among people aged 25–64	5%	2%
Reducing the share of early school leavers	12%	12.5%
Increasing the share of persons aged 20–24 who have completed secondary education	83.3%	86%

Source: NSLLL 2008–2013 and Eurostat data, code: trng_lfs_02; code: edat_lfse_15; code: tps00186

Regarding the objectives set in the second National Strategy for Lifelong Learning (NSLLL 2014–2020), notably weak progress could be observed. This is quite striking considering that improvement efforts for the majority of specified indicators had already commenced under the previous NSLLL 2008–2013 (Abdul-Hamid et al., 2021: 20). It is also noteworthy that the NSLLL 2014–2020 recognises the need for changes in the education and training

system to ensure the development of a lifelong learning mindset. In other words, it acknowledges that Bulgarian society has not yet established or embraced such a sustainable attitude, despite the efforts made under the first strategy.

None of the set main objectives from the NSLLL 2014–2020 were fulfilled (see Table 4). Although 15 years have passed since the first LLL strategy, the experts (experts 2 and 3) point out that the first impact area of the NSLLL 2014–2020 — “Ensuring the conditions for transition to a functioning system for lifelong learning” — has been seen little success up to now, due to its superficial implementation. Progress has either been lacking or minimal in almost every designated action area outlined in the strategy.

A qualitative assessment of the implementation of the NSLLL 2014–2020 objectives (Deikova et al., 2021: 34) indicates that, compared to the pre-2014 period, some progress was attained: reducing the proportion of early school leavers aged 18–24, increasing the percentage of individuals aged 30–34 with higher education and enhancing the employment rate among the population aged 20–64. However, no progress was made on the remaining goals aimed at preschool and school education, vocational education and training and lifelong learning. This leads the authors to the conclusion that, “[d]ue to the low level of progress on most indicators during the period 2014–2020, the adult learning sector continues to be the least developed in the overall education and training system” (Deikova et al., 2021: 36).

It could be argued that the second strategy set unrealistic targets, especially considering the status quo. In the pursuit of fulfilling European recommendations, factors such as the socio-economic conditions in the country, inequality of access to adult education, real characteristics of the educational system, employers’ willingness to invest in training, and the attitudes and needs of adults regarding education and training were not taken into account. This demonstrates that, in spite of the apparent intentions of the strategic documents, plans and regulations, the reforms being implemented in the Bulgarian educational system have not led to the desired outcomes. Furthermore, there has been a tendency towards deterioration across some indicators in recent years.

Table 6 Major objectives and achieved results, NSLLL 2014–2020

Objectives	Objectives for 2020	Results as of 2020
Increase preschool education and training	90%	Data for 2019 ¹⁴

¹⁴ NSI (2023). Share of children covered in pre-school education and training from the age of 4 until entering the first grade, available at: <https://monitorstat.nsi.bg/bg/Report/Info?id=131af84c-b262-4dcd-915a-fe0cce8e1631>.

coverage from age 4 until first grade enrolment		82.67%
Reduce the share of early leavers aged 18–24	11%	12.8%
Reduce poor achievement among 15-year-olds in:		Data for 2018 ¹⁵
- reading	30%	47.1%
- mathematics	35%	44.4%
- natural sciences	30%	46.6%
Increase the share of those attaining professional qualification degrees in the broad areas of Informatics, Technical Equipment, Manufacturing and Processing, and Architecture and Construction	60%	42.6% ¹⁶
Increase the share of those aged 30–34 who have completed higher education	36%	33.4% ¹⁷
Increase the employment rates of the population aged 20–64	76%	72.7% ¹⁸
Increase the participation of the population aged 25–64 in education and training	5%	1.6%
Reduce illiteracy rates:		1.3%
- among persons aged 15–19	1.5%	aged nine or older identified themselves as illiterate ¹⁹
- among persons aged 20–29	1.5%	

¹⁵ Those not having reached level 2, defined by PISA as the “minimum level of proficiency”, in Vassileva, A. (2019). 2018 PISA Results. Sofia: Centre for Evaluation in Pre-school and School Education at the Ministry of Education and Science.

¹⁶ Vassileva, A. (2019). 2018 PISA Results. Sofia: Centre for Evaluation in Pre-school and School Education

¹⁷ Eurostat, Population by educational attainment level, sex and age (%), code: edat_lfse_03, available at: https://ec.europa.eu/eurostat/databrowser/view/edat_lfse_03_custom_8452437/default/table?lang=en.

¹⁸ Eurostat, Employment and activity by sex and age - annual data, code: lfsi_emp_a, available at: https://ec.europa.eu/eurostat/databrowser/view/lfsi_emp_a/default/table?lang=en.

¹⁹ NSI. Census 2021: Socio-economic characteristics of the population as of 7 September 2021, available at: https://www.nsi.bg/sites/default/files/files/pressreleases/Census2021_population_si.pdf.

Many opportunities supporting education, training and skills development among various target groups are outlined in the strategic documents and implementation plans with financial coverage (expert 2). Yet most of these opportunities fail to demonstrate genuinely positive achievements in the field of LLL. On one hand, there is institutional support (the institutions formally complete their tasks); on the other, there is a lack of clarity as to how these strategic actions could actually affect the skills development, personal improvement, self-realisation or inclusion of individuals in public life or what specific benefits they offer employers and businesses. The experts point out that feedback gets lost in translation and no evidence of the desired results actually exists: *“... sometimes the practical implementation is not exactly what we aimed for”* (expert 2). A substantial obstacle to executing effective LLL policies, according to the interviewed experts, is their general lack of comprehensiveness and cohesion: *“[w]hat’s missing is an understanding of the essence of lifelong learning policy as an interdisciplinary, horizontal policy, and [this] continues to be a serious challenge. [It] is still not based on the connectivity between the separate sectors within the education, training and learning systems in Bulgaria. Each of them — preschool, general, vocational and higher education, and the non-governmental sector and labour market — views it as a policy that ‘disrupts’ the targeted framework of that respective sector rather than expanding its possibilities”* (expert 6).

The assessment of the NSLLL 2014–2020 in practice also indicates that the adult learning sector is developing within individual sectors of the education and training system or other socio-economic sectors, without ensured connectivity between them. Stakeholders remain passive while the coordination of stakeholder interaction remains fragmented, despite the coordination mechanisms that have been established (Deikova et al., 2021: 87).

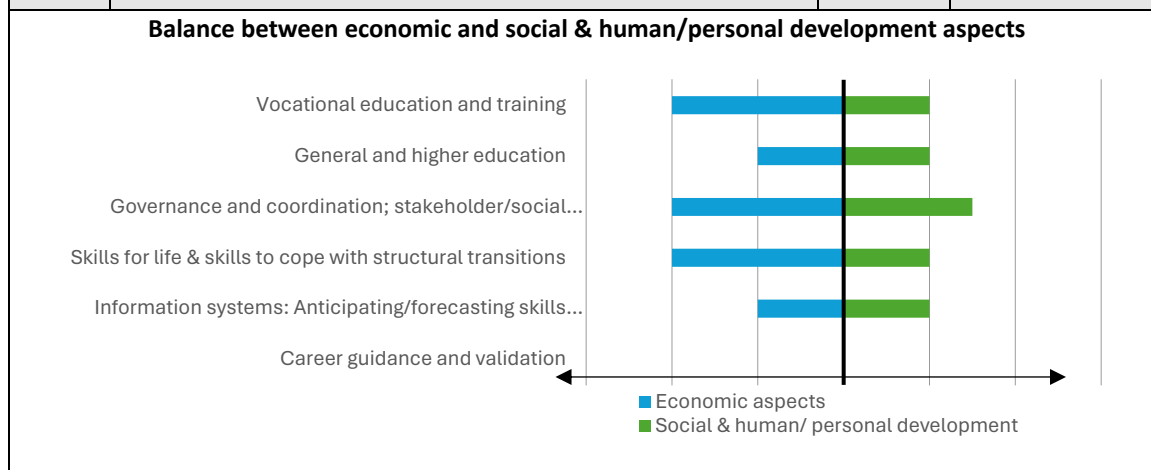
It should be noted, however, that significant positive changes have been achieved despite these shortcomings. Numerous LLL projects and measures have been carried out, as highlighted by the interviewed experts: validating the dual form of education; strengthening institutional capacity within the VET system to attest to the professional knowledge, skills and competencies acquired through independent study or informal learning; updating the state educational standards for acquiring professional qualifications; and other specific measures, such as short literacy courses for adults which would enable them to subsequently pursue professional training, among others.

Norway

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Box 4 Analyzed strategic policy documents for Norway

Code:	Analyzed strategic policy document:	Timeline:	Implementation:
NO1	Strategy for Lifelong Learning in Norway: Status, Challenges and Areas of Priority (2006)	2006-	Not applicable (no actions foreseen)
NO2	The Norwegian Strategy for Skills Policy (NKPS)	2017-2021	Substantial



Overview & context

Skills policy (*Kompetansepolitikk*) has during the last 20 years become a well-established term in Norway. It is defined as the overall policies for the development, mobilisation and utilisation of skills in society (NKS 2017). As the definition shows, it is used as an overarching term encompassing learning at all stages of life and at all learning arenas, both within the education system, in work life and elsewhere in society. However, as education policy covers the education system, skills policy in Norway has a specific emphasis on skills development among adults, particularly those in the labour force. Skills strategies like the most recent *Nasjonal kompetansepolitisk strategi 2017-2021* not only covers the supply side, but also describes how the organisation of the economy and labour market lays beneficial constraints that stimulate skills demands. The strategy also states that the country's model for tripartite cooperation in formulating and implementing reforms and strategies lays a foundation for carrying out the obligations that the strategy put on each partner (organisations and government ministries).

In the late 1990s skills policy were high on the political agenda, to a large part driven by political pressures from The Confederation of Trade Unions, known as LO. A public committee report (NOU 1997:25) laid the foundation for a competence reform consisting of two major elements: first, new legislative rights, incl. right to study leave, right for adults to primary and secondary education, and right to validation of real competence; and second, a funding programme to develop the supply side. The evaluation of the latter programme showed that many new types of courses were established, but also that these primarily reached those with higher education and that targeted programmes towards those with little education or lacking basic skills were needed. This lesson characterised skills policy in Norway from 2003 till around 2015. Skills policies were multi-faceted but public expenditure within the policy field went primarily to programmes to improve basis skills and reach those with little formal education.

In 2016 the conservative-led government initiated a process to develop a skills strategy which all major social partners and ministries could jointly support. The agreed-upon strategy document (NKR 2017), the “The Norwegian Strategy for Skills Policy 2017-2021” (NKPS), and to a limited extent its less comprehensive predecessor strategy, the “Strategy for Lifelong Learning in Norway: Status, Challenges and Areas of Priority (2006)”, will be analysed in the following chapters. Only the more recent NKPS strategy was followed by a set of skills policy measures, in particular in the reform *Lære hele livet* (Meld.St.14 (2019-2020)). These included tripartite defined and publicly funded competence programs for different sectors of the labour market, funding for the development of flexible learning methods, grants for further education for skilled workers and modular structuring of VET.

Strategies goals

The strategy “**Strategy for Lifelong Learning in Norway: Status, Challenges and Areas of Priority**” (2006) was primarily formulated internally by the Ministry of Education and Research, with only limited social partner involvement. In the 2006 strategy document five challenges that requires extra attention were listed: 1) many people have poor basic skills, 2) many people lack documentation and needs validation of their competence, 3) it is difficult to find information on educational opportunities, 4) it is difficult to combine learning with other obligations, and 5) parts of work life are insufficiently learning-intensive. All this remained as perceived policy problems when work with the new strategy began. It was made primarily in response to the Lisboa process which required the countries to have a strategy. Reading it today, it gives a very good account of the challenges and the state of the field, and furthermore, its priorities are sound, but it is telling that even very experienced stakeholders interviewed have little or no knowledge about the 2006 strategy. There is thus little evidence that it has had any major influence in shaping conceptions and policy.

However, an important development in the skill policy area came in 2013 when OECD carried out a skills review for Norway (OECD 2014). In addition to the reports, OECD were also instrumental in aiding the process of working with a skills strategy. It helped establishing a joint understanding among stakeholders (social partners, government ministries) what the key challenges for skills policy in Norway were (interview 1). One of the key recommendations was that the government should establish a whole-of-government skills strategy in cooperation with social partners. This spurred the process that led to the establishment of the skills strategy Norwegian Strategy for Skills Policy 2017-2021 (Nasjonal kompetansepolitisk strategi 2017-2021).

The Norwegian Strategy for Skills Policy 2017-2021 (NKPS) was created under the government lead by prime minister Erna Solberg from the Conservative party. The government was in 2017 a coalition between the two right wing parties the Conservatives and the Progress Party. In contrast to the preceding strategy, the 2017-2021 strategy was developed through extensive deliberations between all confederations of employer and labour organisations and all ministries with a stake in skills policy. The final strategy document has no less than sixteen signatories, including the prime minister. The initiative was taken by the Ministry of Education and Research, but the process is seen by stakeholders interviewed as a bottom-up approach. Several interviewees point to OECD skills review in shaping a common understanding which made it easier to agree on the analysis and priorities in the 2017-2021 strategy.

The strategy stresses the need for skills to meet the general and rapid development in Norwegian business and enterprises, due to climate change, environmental issues, technological change and globalization. The overarching goals of the strategy are both

explicitly market orientated and socially orientated. The former aspect is clearly expressed in the goal to ensure that Norwegian industry and commerce can compete on the international market. It leans on the notion of the Norwegian model with its emphasis on labour market inclusion and tripartite cooperation. This is expressed in the goal to prevent individual exclusion from the labour market due to technological innovations, and to prevent dualization and polarization of the labour market by ensuring both sufficient skills and the “right” skills. The goal to be better prepared for and to better accommodate labour market change (in terms of technological change) may be seen as pertaining to both of these aspects. Furthermore, the introductory chapter of the strategy states that its goal is to contribute to an efficient public sector. Thus, the overarching goals may be regarded as having both economic and social elements. When it comes to personal development, there are no explicit goals on this and skills development for the sake of democratic issues or purely personal issues beyond inclusion in the labour market is not a part of the strategy.

Several more specific goals are expressed in the strategy, and they are expressed in the following three chapters: 1) Good choices for the individual and for the society, 2) Learning in the working life and making good use of skills, 3) Strengthen the skills among adults with a weak labour market attachment. In the following, we elicit both goals that are listed as bullet points at the end the strategy chapters, and goals that are expressed in the text.

Some of the goals are related to **further and continuing education** in general. Most of these goals can be regarded as of both social and economic importance. Economic goals are clear when it comes to the goals pertaining to return to workplace-based learning. The need of more knowledge at different levels is expressed. The following goals have been stated: to increase knowledge on return to work-based learning, including returns on the workplace, the employee and society. Moreover, it is a goal to increase knowledge on how employers can facilitate work-based learning, the benefits of social partnership and which upskilling that yields the highest return. Opportunities to combine work and education should be improved, and further and continuing education of higher relevance developed.

The goals related to **vocational orientation and training** in particular are: Increase the labour market supply of vocational workers. Improve further and continuing education. A well-functioning supply and demand side. Develop better programs at CVET institutions (vocational colleges). The former goal is thus of mainly economic importance.

A goal related to **general and higher education** is formulated in the same vein: Develop better programs at universities and colleges. Apart from this remark, little is written about strategies pertaining to higher education. In general terms, however, it is stated that there is a need for skills to meet green transition, within natural sciences, economics,

humanities and social sciences, and skills to meet digitalisation and new production techniques.

Governance, coordination and social partner involvement are important elements of the strategy. The strategy emphasises increased coordination of existing knowledge on skills, and a stronger governmental involvement at the regional level. It is a goal that county administration develop skills strategies in cooperation with municipalities, the social partners, welfare authorities (NAV), third sector, vocational colleges, universities, governmental enterprises. This is regarded as a vehicle to ensure relevant labour market skills supply and is thus of mainly economic importance. It is a goal to strengthen the regional partnership, national authorities must provide a greater scope for regional stakeholders, facilitating a binding participation in regional processes. Aspects of importance for both economic and social aims are: Develop learning intensive jobs, invest in employee's skills and competencies. Prevent social dumping and higher wage dispersion through upskilling. Better coordination of skills and regional/local development. Better career guidance to prevent dropout from school, to prevent that skills obsolescence and help seniors cope with labour market transitions and transition to work in general. Improved cooperation between education institutions and working life to increase relevance and motivation, and make students more prepared for work. The goal to ensure skills needs in the Sami population in order to preserve traditional trades and industries may be regarded of primarily social and democratic importance. However, ensuring skills in the Sami population is crucial in order to both support Sami industries and prevent social stratification in the Sami population – aims in line with the overarching strategic goals.

Basic skills are given great attention in the strategy. This set of goals is particularly pointed to adult immigrants, who generally experience weaker labour market attachment than the rest of the population and who also have a lower educational level. Many are without upper secondary school diploma (general or vocational) or even lower secondary school. A goal is to make sure that immigrants enter training, education and work, in order to meet local labour market demand, and facilitate their labour market integration. Improved transitions to work or further education. Strengthen the skills among adults with poor basic skills, poor Norwegian skills and without upper secondary school. The goal to prevent skill deficits in certain exposed areas, such as Northern Norway, are also pointed out.

The final issue area is the **anticipation of skills need**. It is a goal to ensure society's capability to make good skills choices: human resources management, skill match between business and employees. A common ground for anticipating skills supply and demand, regionally and nationally. Ensure individual capability to make good skills choices: skills leading to work, and opportunities for skills development.

Indicators, actions and implementation

Overall, the proposed means rely heavily on improved coordination between different stakeholders in terms of i) better coordination of existing knowledge on systems for upskilling and on skills demand, ii) increased access, both for the individual and the society, for knowledge on skills opportunities and skills demand, iii) increased cooperation and coordination between working life, social partners, NGOs, education institutions and governmental and administrative bodies, and iv) increased skills involvement and policy accountability of the regional public administration.

The interviews reveal that an important goal was to embed skills policy within labour market policies. For instance, the strategy aimed to increase the awareness of skills beyond the Ministry of Education, such as the Ministry of Labour and Social Inclusion, and to strengthen the use of skills and education in labour market/unemployment policies. This is evident in the composition of partners involved in forming the strategy, and in the text itself.

The latter aspect, increased accountability at the regional level, entails that many of the proposed actions are tied to the regional level. In this document, however, we focus on actions and implementations primarily at the national level.

Quantitative indicators are not defined on how to capture progress on goals, and no specific timeline is set for when the different goals are to be achieved. The strategy is not formulated with clear action points, but in more general terms. The actions are to some extent difficult to distinguish from the goals themselves. As an example, a stronger collaboration between the working life and the vocational colleges and universities can be regarded both as a goal and as a measure to reach the goal of increased relevance and skill match.

The broader, high-level actions defined can be read as serving both economic and social goals. In the following, we have listed a selection of what can be regarded as the most important actions (or goals) of these broad actions proposed on different areas:

VET

- Strengthen cooperation between educational institutions and working life, in light of regional skills strategies and regional partnerships.
- Create clusters of firms to facilitate workplace training.
- Improved access to apprenticeships.
- Develop and make visible alternative routes to vocational education at IVET level.
- Improve transitions from IVET to CVET and higher education.

- The strategy partners also point out that a further developed of the Master craftsperson programme and vocational colleges may increase the attractiveness of VET education.

Governance and coordination/information systems

- Strengthen tripartite cooperation and the Norwegian work life model with high union density, coordinated wage bargaining and a culture for fulltime work.
- Improve and enhance already institutionalised partnerships between university/colleges and working life, both nationally and regionally.
- Further develop career guidance for both young people, seniors and immigrants. Build a comprehensive system for career guidance in all regions. Strengthen career guide competencies on working life, skills need, senior issues, integration and Sami culture/working life.
- Strengthen the skills policy responsibility among regional political representatives
- Establish a committee (Norwegian committee on skills needs/KBU) of researchers, analysts and tripartite representatives that will gather and analyse knowledge on Norway's future skills needs and objectives.

Skills in general

- Encourage upskilling and adult learning at the workplace through tripartite cooperation.
- Strengthen the digital skills in the whole work force.
- Strengthen cross-enterprise cooperation, establish clusters of employers within different sectors. Strengthen cooperation between clusters (and working life in general) and education institutions to create good programs for further and continuing education.
- Make better use of formal education from country of origin by ensuring complementary education when necessary.
- Ensure a well-functioning system for approval of foreign education, and systems for qualified skills assessment.
- Improved access to web-based education and flexible education programs.
- Improve basic skills and basic education for immigrants with little formal education. Strengthen the Norwegian language training for immigrants in general. Make Norwegian language training and the introduction programme for immigrants²⁰ more efficient, and improve labour market integration for immigrants through formal qualification. Strengthen the tripartite cooperation on these matters.
- Employ working life as a training arena more actively both in labour market and integration policy.

²⁰ A training programme intended to prepare for participation in Norwegian working life and the Norwegian language.

- Increase the Labour and Welfare Administration's (NAV) provision of reskilling, continuing and further education provided (NAV).
- Stimulate the use of already existing grant schemes for work-based learning governed by the state (*Kompetanseplussordningene*), and develop them further in joint partnership with the state, social partners and the thirds sector (VOFO).
- Develop a method/model for the assessment of skills acquired through work. Better documentation methods for such skills.

Higher education is given less explicit attention in the strategy, but actions are expressed in terms of the strengthening of working life-education system involvement, in order to increase the relevance and accessibility of further and continuing education.

The strategy document itself does not sketch out concrete plans of action on the different means listed above. According to one of the informants, the partners were nevertheless aware of their own responsibility regarding the different actions. The strategy was pursued through a designated council for skills policy, lead by the deputy minister of Education. The council members reflected the strategy partners: the five ministries, trade unions, employer organisations, one third sector organisation, the university and college council, council for vocational colleges and county representatives. The strategy states that every strategy partner is to report actions to the council in the strategy period (2017-2021). The council for skills policy developed an overview of the actions implemented and actions that are planned, based on reports from the partners.

Some of the most important specific actions that have been implemented so far, are listed in the following.

Governance and coordination/information system:

The establishment of the Norwegian Committee on skills needs (KBU) in May 2017 is considered as one of the most important outputs of the strategy. The committee “is to provide the best possible evidence-based assessment of Norway’s future skill needs. This assessment will form the basis for planning and strategic decision making of both authorities and in the labour market, regionally and nationally.” (*Norwegian Committee on Skill Needs*, 2018). The committee will continue until 2027, and delivers annual reports on different subjects, e.g. the green transition, higher vocational education. In this way. The committee follows up on the overarching goal of increasing and coordinating knowledge on skills issues.

All regions have established a tripartite *Skills forum* (Kompetanseforum). Furthermore, all regions had by 2019 established career guidance services.

VET and vocational colleges

An important policy measure which was established following the strategy was the tripartite programmes for skills development on industrial level, which was first implemented in 2019. Within these programmes, the main employer and labour organization agreed on skills development measures that addressed skills problems within that particular industry. Initially, there were two programmes, one for municipal health and social care, and one for industry/manufacturing and construction combined. The skills development offered were shorter courses on vocational college level. With the Covid pandemic, the number of programmes grew, with an additional eight programmes established mostly in 2020 (one in 2021). Many of the new courses offered were on vocational college level, but also other types of courses. An evaluation showed that the common key element of tripartite cooperation had worked well, and that the bi-partite decision-making structure was adaptable and useful for handling the challenges (and opportunities for skills development) created by the Covid pandemic. The programmes have been fairly successful in reaching target groups that often do not receive much training. The programmes have also helped establishing labour market relevant skills development which probably would not have been established in the absence of these programmes.

Vocational colleges, university colleges and universities

A second policy measure following the strategy was the grant schemes for flexible further education. These schemes offered funding for vocational colleges, university colleges and universities for developing flexible education/courses. Flexible may mean flexible in terms of physical/digital arenas, time, place and in progression requirements which allow combination with work and other obligations. These schemes were evaluated in 2022 (Korseberg et al. 2022) and showed positive results, but also that the education was reliant on the temporary funding and that such flexible education was not seen universities and university colleges as part of their core activities. This had the effect that staff had to be recruited specifically for this further education or that existing staff were only temporarily relieved of other duties. There are reasons to fear that long term effects would be limited.

Skills in general

- *Grant schemes* for basic skills (Kompetansepluss) was in 2017 allocated more funding from 2017 on.
- With the new Education Act, in force from August 2024, upper secondary school for adults are offered as flexible, module-based training.
- The new Integration Act, in force from January 2021, is largely oriented toward formal qualifications as an integration strategy, aiming at facilitating participation in upper secondary school for adult immigrants.

- According to interviewee #4, the action/goal to create better documentation method for skills acquired through work is perhaps the most difficult to implement. This goal has so far not been achieved.
- Some of the strategic goals pertaining to governance and coordination on the regional level rely on the Region reform of 2017. The strategy calls for a stronger involvement of the regional (county) level. This was stated already in the National expectations regarding regional and municipal planning of 2015 (KRMD 2015), (the government launch such expectations every four years). The call for establishing the Skills fora mentioned above was, in fact, specified already here. This document also refers to the ongoing work with the skills strategy of 2017, demonstrating parallel – and corresponding - processes on skills policies in the years after the completion of the OECD project. This makes it difficult to assess how much development in this issue area was reliant on the strategy document and process.
- The above point on difficulties in assessing the role of the strategy itself, is also relevant on the work related to developing the new Integration act of 2021 and the new Education Act of 2024
- As of 2024, the Council for skills policy is still functioning, although the council's webpage ceased to provide updated information on skills policy actions in 2019. According to one of the informants, the council gradually has lost some of its central role. This, the informant states, may be due to the stronger focus on skills within labour market policy and among regional actors, which was in line with strategic goals. The result was thus that the original council was made somewhat redundant. This view is contested by another informant, who claims that the council has retained an important role.

England (UK)

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Box 5 Analyzed strategic policy documents for England (UK)

Code:	Analyzed strategic policy document:	Timeline:	Implementation:
ENG1	Leitch Implementation Plan	2007-	Limited
Balance between economic and social & human/personal development aspects			
<p>The chart for the Leitch Implementation Plan shows a strong focus on economic aspects (blue) across most categories, with a significant emphasis on vocational education and training. Social & human/personal development (green) is also present, particularly in governance and coordination, and career guidance and validation. The balance point (vertical line) is positioned towards the right, indicating a higher proportion of economic aspects.</p>			
ENG2	Skills for Sustainable Growth Strategy	2010-	Substantial
Balance between economic and social & human/personal development aspects			
<p>The chart for the Skills for Sustainable Growth Strategy shows a more balanced approach. Economic aspects (blue) are prominent in vocational education and training, governance and coordination, and career guidance and validation. Social & human/personal development (green) is also significant, particularly in skills for life and skills to cope with structural transitions. The balance point (vertical line) is positioned towards the left, indicating a higher proportion of social & human/personal development aspects.</p>			

Overview & context

Policy makers in England over many years have been concerned about under-investment in skills (Gambin and Hogarth, 2016). By the mid 1970s in England VET was not much in evidence. It is safe to say that there was not much of a publicly funded skills system to speak about. Participation in post-compulsory education was limited. It seemed to be enough to train an elite who might go on to study at university and a minority who might enter either technical and white collar employment. The remainder would left to their own devices (Edwards, 1983). If they were lucky they might be provided with initial vocational training by their employer which was most likely unaccredited. International comparison reveals that even by the mid-1990s, despite reforms to the VET system which saw the introduction of National Vocational Qualifications (NVQs) and publicly funded apprenticeships, intermediate level skills at ISCED levels 3 and 4 were relatively under-developed compared with several west European countries (see Eurostat [edat_lfse_03]). In fact, the country had a relatively high share of people with low levels of educational attainment. Matters had improved by the end of the 2010s, but intermediate level skill development – where much VET has traditionally been concentrated - remained below that of countries such as Germany and Austria.

From the late 1970s onwards there have been efforts to create a vocational education and training (VET) system that has relied upon the use of markets to bring about a demand-led system (Cedefop, 2018)²¹, initially by establishing a VET infrastructure in response to rising levels of youth unemployment. From 1997 to 2010, a period of substantial investment in VET subsequently began, and a marked acceleration, from a policy perspective, towards the creation of a market based system notably with the recommendations contained in the **Leitch Review** (2006) and their implementation (Leitch, 2006; DIUS, 2007). The period is characterised by policy concerns about the volume of low skilled people many of whom were in employment and the extent to which the skills system was meeting demand from the labour market. The policy conundrum was how to continue to build participation levels and deal with the long-tail of low skilled adults and, at the same time, increasingly let the market determine levels of provision recognising that it may not necessarily lead to inclusive outcomes. The response was to

²¹ By demand-led system is meant an approach whereby the market, in the guise of employers, is able to determine the content of training provision, such as that delivered through apprenticeships, to which training providers need to respond to maintain their revenue or else face going out of business. This should, other things being equal, reduce the skills systems dependence on the state for financial support.

set targets for qualification attainment, provision of free training to employers via the Train to Gain programme, and the continued expansion of apprenticeship training.

The final period (2010 to the present) marks one where funding available for education and training became increasingly constrained with the exception of apprenticeships. The 2010 Skills for **Sustainable Growth White Paper** sets out what was to be achieved over the period of the incoming government alongside changes in funding (BIS 2010a, 2010b). The period was marked by policy announcements which were by and large concerned with attempts to increase employer investments in VET while reducing government expenditure. It also saw the reform of apprenticeships. The Richard Review of Apprenticeships suggested root and branch reform (Richard, 2012). These were designed to make apprenticeships more attractive to employers (by giving them a key role in the design of standards that determined the content of an apprenticeships), increase provision at higher levels (thereby producing more high value skills), and improve the identify of apprenticeships.

The focus of this chapter is consequently upon two key junctures in skills policy in England, which can be seen as paradigmatic for the latest two phases of skills policy-making in England:

1. the Leitch Review (2006) and its accompanying Implementation Plan (2007); and
2. Skills to Sustainable Growth White Paper (2010).

Strategies goals'

The Leitch Review of Skills

The Leitch Review (2006) and the following Leitch Implementation Plan (2007) was an excoriating critique of the UK's skills performance with particular attention paid to the relatively long tail of low skilled people in the economy who were considered to lack functional foundation skills linked to numeracy and literacy. It sought to remedy this by committing the UK to becoming a world leader in skills by 2020 (i.e. to compare favourably with those in the upper quartile on the OECD's various measures of skill). In practice this would mean that the country would need to double its attainment at most educational levels.

It also set out a range of principles to underpin delivery of the ambition:

- The strategy underscores a paradigm of shared responsibility among employers, individuals, and the government to augment action and investment. Contributions from employers and individuals should align with areas yielding the highest private returns. Government investment is directed at addressing market failures

- Emphasis is placed on the economic value of skills, necessitating returns for individuals, employers, and society. The promotion of portable skills is advocated for increased labor market mobility.
- The strategy highlights the importance of a skills system responsive to market demands, particularly favoring a demand-driven approach for vocational skills over centralized planning.
- Adaptability to future market needs is emphasized as a core principle of the strategy.
- The strategy promotes the improvement of existing frameworks to avoid unnecessary disruptions, “by improving the performance of current structures through simplification and rationalisation, stronger performance management and clearer remits.”

The impact from putting the above in place was said to be:

- The strategy envisions enhanced awareness of skills development among individuals, offering improved access to opportunities. Workless individuals, in particular, will benefit from effective skills diagnosis and increased support during their transition to sustainable employment.
- For low-skilled workers, the strategy proposes increased opportunities to attain a full Level 2 qualification and basic workplace skills through Train to Gain. Learner Accounts will afford them greater control over flexible and rewarding learning experiences.
- Skilled workers will find expanded career development avenues in the workplace, with emphasis on Apprenticeships, degrees, and management programs.
- Small firms are targeted for streamlined access to relevant employee training, contributing to improved management skills, competitiveness, and productivity.
- Employers will wield greater influence over the simplified skills system, with increased incentives for skills investment across all levels. Expanded skills brokerage and workplace training assistance will be available.
- The strategy aims to mitigate skills deficiencies through widespread upskilling, ensuring a labor supply equipped with portable, economically valuable qualifications.

The Skills for Sustainable Growth Strategy

With a change of Government in 2010 a new White Paper on skills was published: Skills for Sustainable Growth (BIS, 2010a). The financial crisis had led the government to introduce an economic policy of austerity which extended over much of the decade. Arguably this shifted the policy focus on to how the costs of training could be shared more

fairly, however that might be defined, by its beneficiaries (employers, learners and the state).

- There are familiar themes in Skills for Sustainable Growth:
- the importance of skills as a driver of productivity growth;
- the key role to be played by apprenticeships in delivering skills;
- placing employers at the heart of the skills system;
- commitment to a careers service serving people of all ages; and
- reduce government's role in driving top-down change largely by abolishing the targets set by Leitch;
- making skills provision responsive to local needs.

There are new elements as well which for the most part of based around funding:

- co-investment;
- employer routed funding;
- introduction of learner loans for further education courses;
- the pricing of courses;
- the possibility of introducing occupational licensing or levies for some occupations;
- simplifying the skills system.

It is perhaps not surprising that so much consideration was given to funding issues given the pressures to reduce government spending following the financial crash. The investment plan which accompanied Skills for Sustainable Growth stated that over the next five years (i.e. to 2014/15) there would be a 25 per cent reduction to the further education budget. This was to be met by reducing the unit costs funded by government, a reduction in entitlements to fully subsidised training, and the need to rebalance investment away from government to learners and employers. It notes: "Whilst public investment has to reduce, we will at the same time free the sector from top-down targets and direction to enable a truly demand-led system to develop." (BIS, 2010b)

Indicators, actions & implementation

The Leitch Review of Skills

In essence Leitch wanted the skills system to be responsive to labour market needs as expressed, for the most part, by employers. It wanted to see less planning in the system with the market playing a more prominent role in setting out what skills are required to which training providers would need to respond. But it retains two key planning functions for Government:

1. setting targets for qualification attainment; and
2. routing skills training to which employers and individuals had an entitlement through Train to Gain, a government programme that was designed to offer a brokerage service between employers and training providers to ensure that the former were able to obtain state funded training to support their product market strategies

Centrally prescribed targets for 2020, considered to be ‘ambitious’, were set (Leitch, 2006). These included for example the share of adults to achieve the basic skills of functional literacy and numeracy, the share of adults qualified to at least Level 2, an additional 1.9 million Level 3 attainments over the period and boosting the number of Apprentices to 500,000 a year, and the share of adults qualified to Level 4 and above. The Leitch implementation plan published in 2007 (DIUS, 2007) set out the intermediate targets which would need to be achieved to meet the 2020 ambition.

In order to reach these targets, actions were defined in the Leitch Review and its implementation plan. Plans were set out about how assist adults access training through a joined up employment and skills system that would span the work of the respective ministries responsible for skills and employment. This included the a new universal adult careers service in England, working in partnership with Jobcentre Plus (the public employment service) to provide a service that will allow everyone to access the help needed to meet their work ambitions. In particular, the adult careers service was to be responsible for ensuring that individuals obtain the right balance between assistance with their job search and the training which will improve their employability. Flexible training plans were to be developed for individuals so that they could combine training with looking for a job or continuing to work. The Train to Gain programme was designated as playing an important role in supporting this objective. In essence, the plan was to provide **tailored support** to individuals and employers. Additionally, there would be a pilot of Skills Accounts designed to give individuals greater ownership and choice over their learning, motivating them to gain skills and achieve qualifications, enter work and progress in employment.

Employers were to be provided a more central role in the skills system. They were seen as one of its two major customers alongside learners. Employers were to be given leverage and decision-making over both the content and delivery of skills and employment programmes. This was designed to provide employers with confidence that qualifications and learning programmes provided by universities, colleges and training providers would meet their business needs. A new UK Commission for Employment and Skills (UKCES) was to be established to “strengthen the employer voice at the heart of the system.” (DIUS, 2007). UKCES was to provide a ‘vigorous, expert, and external challenge to the employment and skills system at all levels’, to ensure that it delivered the services

that employers and individuals needed. It was also given the role of overseeing **sector skills councils** (SSCs). The remit of the SSCs, under the UKCES, was to focus on: raising employers' ambitions and investments in skills at all levels as well as articulating the future skill needs of their sector, and ensuring that the supply of skills and qualifications was driven by employers. Through their SSCs employers would have the opportunity to play a leading role in the reform and development of vocational qualifications for their sector.

A new partnership in the workplace was to be established. This was designed to encourage all employers in England to take responsibility for the skills of their workforce by making a Skills Pledge to support their employees to become more skilled and better qualified with government help. Any organisation that signed up to the Skills Pledge undertook to support their staff to obtain basic literacy and numeracy skills, and also to work towards achieving their first full Level 2 qualification. Employers making the Skills Pledge would be able to access Government support to deliver their Pledge commitment through Train to Gain, including the support of an independent skills broker to help them assess their training needs and source the right provision for them, and free literacy, numeracy and first full level 2 training for their staff.

While the focus of the Leitch Review and the policy response by Government was focused mainly on adults, measures were also directed at young people. In England there was to be the rolling out of a new qualification. Diplomas in a number of broad occupational areas that had been developed with the SSCs were designed to help young people develop the skills needed for work and higher level study.

There is also a call for heightened employer investment in Level 3 and 4 qualifications within the workplace, extending Train to Gain to higher tiers, significantly increasing Apprenticeship volumes, and fostering improved collaboration between employers and universities. Moreover, the strategy advocates for an augmented focus on Level 5 and above skills. An emphasis is placed on elevating individuals' aspirations and awareness regarding the value of skills. This involves implementing high-profile, sustained awareness programs, streamlining existing fragmented information sources, and establishing a novel universal adult careers service. Lastly, the strategy advocates for the creation of a comprehensive integrated employment and skills service, leveraging existing structures to enhance sustainable employment and progression. This includes launching a program targeting the improvement of basic skills for those unemployed, with embedded support for disadvantaged individuals and repeat claimants. Additionally, the strategy proposes the development of a network of employer-led Employment and Skills Boards, building upon existing models to influence delivery.

Target setting (i.e. against quantitative indicators) - which was ultimately abandoned because they proved hard to meet - effectively provided Government with a degree of

control over the type and quantity of qualification to be attained. This could be rationalised as a need to have a safeguard in place should market failures arise, but seems odd given the rationale of letting the market determine skills supply that there should be a centrally determined set of targets. Professor Unwin commented on the arbitrary nature of the targets Leitch had set and the Government had endorsed: “It is not clear what the evidence base was for the targets. One of the problems is that there is a separation in Leitch between the targets, which are the supply side part of the report, and any analysis in terms of what is happening in real workplaces and whether employers will make use of qualifications and the connection between what is in the qualifications and the skills needed in the workplace” (House of Commons, 2008). Professor Wolf, who would produce her own review of vocational education and training in England five years later, commented: “Although it constantly talks about a demand-led approach, [the Leitch Review] is actually an additional ratcheting up of what is effectively a centrally planned, supply-driven approach to skills. It talks on every second page about world-class skills and demand-led systems, but when you actually look at what it is proposing, what it is proposing is more targets and additional levels of government direction” (House of Commons, 2008).

Many of the recommendations from the Leitch Review were either never implemented (e.g. learner accounts which have learners a degree of leverage in the system), struggled to gain traction (the adult careers service now barely exists and employment and skills policy is far from integrated), or were subsequently dropped (e.g. the qualification targets, the skills pledge, and skills brokerage).²² Train to Gain, a government programme introduced in 2006 was designed to offer a brokerage service between employers and training providers to ensure that the former were able to obtain state funded training to support their product market strategies was eventually abolished in 2010 because of the levels of deadweight loss attached to it (NAO, 2009). Other changes are observable such as the increase in the participation age which is now set at 18 years. For the most part, however, there is little trace of the specific recommendations Leitch proposed and the government of the day pledged to implement. But some of the principles it sought to establish, in particular the influence of employers over the content of the skills system, and the increased use of markets to deliver training. The demand side measures it mentions – even if they were not fully implemented at the time – have shaped the provision of VET in England today. So, while the Leitch Review may to some extent be forgotten today, it has had a more far reaching impact through time.

²² It is also worth noting that UKCES was abolished in 2017. Sector Skills Councils still exist but not as extensively as in the past.

The Skills for Sustainable Growth Strategy

If the criticism of the Leitch Review was that it was, despite its protestations to the contrary, too supply-side oriented, Skills for Sustainable Growth in some respects completed the demand side reforms promised in Leitch. It unleashed a series of changes to bring about a more demand led system, including:

- co-funding of vocational training between employers, employees, and the state;
- employer routed funding for initial vocational education and training (especially apprenticeships);
- reduced training entitlements and the introduction of learner loans.

The strategy promotes that adult skills provision should contain an element of co-funding made on a cash-basis rather than contributions in-kind from employers or individual learners. Co-funding related to the costs borne by the training provider in delivering a particular course or programme. This required all courses to have cost ascribed to them. In the case of apprenticeships a series of funding bands were established for the delivery of every approved standard. Funding was also be routed through the employer. There was a policy expectation that employers would negotiate with training providers over the cost of delivering training which might result in the costs charged by a provider being lower than that indicated by, for example, the funding band for a particular apprenticeship standard. Research at the time indicated that little enthusiasm from employers for a system that would grant them more influence over the content of an apprenticeship in return for funding an element of their providers' costs. And employers seemed satisfied with the provision of off-the-peg standards and were not keen on entering into negotiations with providers over costs (Hogarth et al., 2014). The impact of co-funding on participation levels indicated that where relatively low-cost apprenticeships were being delivered – i.e. ones where the costs of training needed to be recouped over the formal training period - this could reduce the overall number of apprentices.

Before co-funding and employer routed funding could be established in relation to apprenticeships, an apprenticeship levy was introduced in 2017 where every employer would pay a levy equal to 1.5 per cent of their payroll above £3m. Employers could claim back their levy contribution to fund the training provider's costs of a delivery a particular apprenticeship standard. An ex-ante evaluation prior to the levy's introduction indicated that it would have little impact on the delivery of apprenticeships at Level 3 and above. This was because the funding bands associated with standards at this level comprised a relatively small share of the overall cost to the employer of delivering the apprenticeship

(Gambin and Hogarth, 2020).²³ It would however have an impact on lower-level apprenticeships where the cost-benefit element was more finely balanced. In practice this is what has happened (see Figure 1). The number of starts declined and an increasing share of apprenticeship starts were at higher levels (Level 3 and above). These were often delivered to existing employees of an organisation some of whom were aged over 24 years of age.

A further element of the changes initiated by Skills for Sustainable Growth was a reduction in entitlements to training and the introduction of training loans. For those aged over 19 years restrictions were introduced on the vocational courses they would be able to take free of charge. In general, except for courses linked to basic numeracy and literacy courses and for a first full level 2 qualification, learners would be expected to pay for their course. In practice training loans gained little traction. In 2022/23, the share of training expenditure accounted for by training loans was £124m (less than 1 per cent of that spend on loans to higher education students) (Tahir, 2023).

Looking back over the period since Skills for Sustainable Growth it has squeezed government spending on further education and skills and done nothing to stem the decline in participation levels (Foley (2021); DfE Further Education and Skills Statistics). This is accounted for by:

- a fall in the number of people enrolling on publicly funded education courses which may well reflect the reduction in entitlements to take certain courses especially relatively low-level ones. As a consequence, funding for the providers of those courses has fallen; and
- large real-terms cuts to the funding rates for some courses (Tahir, 2023).

²³ Lindley (1975) makes a distinction between production and investment apprenticeships. The former refer to situations where the employer is looking to minimise the costs of training because there is relatively little return obtained from the skills acquired. In the latter, the employer makes an investment because long-term gains can be obtained from the skills obtained from the apprenticeship.

Germany

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Box 6 Analyzed strategic policy documents for Germany

Code: DE1	Analyzed strategic policy document: Strategy for Lifelong Learning in the Federal Republic of Germany	Timeline: 2004	Implementation: Not applicable (no actions foreseen)
Code: DE2	Analyzed strategic policy document: Advancement through Education	Timeline: 2008 – 2015	Implementation: Limited
Code: DE3	Analyzed strategic policy document: National Skills Strategy	Timeline: 2019- 2022-	Implementation: Substantial

Overview & context

Skills policies in Germany are governed by a complex landscape of stakeholders on the national and sub-national level as well as social partners. The German initial skill formation system is characterized by its dual approach. Following Busemeyer & Trampusch (2012) it can be categorized as a collective training system, where both the state, firms as well as unions have a strong involvement and commitment towards VET. After compulsory schooling around 51% of each age cohort chooses a vocational pathway at some point in time in their educational biography (BIBB 2023). Most initial VET is provided in form of apprenticeship programs (65%)²⁴ in the dual system of vocational education and training as well as in school-based form (35%) (BIBB 2023). Apprentices spend the majority of their time (around 80%) at the workplace and around 20% in vocational schools. Concerning continuing vocational education and training (CVET), Germany has a very complex landscape which is characterized by a greater variety of providers, different policy frameworks and stakeholder interests than in initial vocational education and training (OECD 2021). In addition, there are some VET programs available for adults and at tertiary level (see Cedefop 2020). The governance of CVET is shaped by the fact that Germany is a federal state where The governance, provision and financing of CET is shaped by strong federalism (with the cultural sovereignty for education often resting with the federated states [Länder]), social partner involvement, decentralization, pluralism and self-responsibility (Desjardins 2017 in OECD 2021: p. 15).

²⁴ Apprenticeship programmes have a duration of two to three and a half years and are at EQF level 3-4. Apprenticeships are based on a contract between the firm or public institution offering an apprenticeship place and the apprentice. The employers bear the cost of in-company training and the apprentice is also remunerated. The remuneration varies across occupations and increases every year of training.

While there has been a close and institutionalized cooperation and coordination between the federal state and the Länder through the so-called Federal-Länder-Committee in the past, with federalism reforms in 2006, the strong cooperation and coordinated was replaced by a looser exchange format. Hence, prior to 2006, no strong incentive for formulating education and skills strategies existed, while after 2006 the stronger independence of the Länder seemed to have prevented concerted strategic planning. Nevertheless, an increase in political strategic documents across all political spheres can be observed in the past decades, including the education sector. This, can partly be explained through the influence of strategic policies at EU-level and partly because of the fundamental challenges Germany (and the rest of Europe) is facing. Up to now, there is no substantial national education strategy worthy of the name²⁵. Instead, education policy strategies are mainly aimed at sub-areas (teacher training, digitalization of schools, etc.) or the implementation of the UN Sustainable Development Goals. Governance by strategic policy making has however increasingly become the hallmark in areas such as employment policy and in the field of further education and training with lifelong learning among its key fields of application.

Against this backdrop, the aim of this country case study Germany is to shed some light on the potential factors which have influenced and shaped strategic policy formulation over time. For this purpose, three national skills policies are discussed, with a focus on the latter two: The “Strategy for Lifelong Learning in the Federal Republic of Germany”, 2004; “Advancement through education”, 2008; and the “National Skills Strategy” (Continuing education and training as a response to digital transformation), from 2019/2022.

A specific focus is also placed on the influence of the international LLL concept and how it has found its way into the German policy context and how CVET has changed due to some fundamental changes of the orientation of social and labour market policies. In fact, LLL has – despite the expansive increase in official publications and reports in the last five decades, not much entered the German academic education discourse, and if, mostly in the context of adult education. LLL has manifested itself in the political sphere and at policy level. One of the reasons being that social problems can be reformulated as educational or learning problems of the individual. As Centeno (2011: p. 141) shows, the LLL concept of the Council of Europe is the result of institutional learning from UNESCO and OECD, which is not surprising, given that often the same actors or networks were involved in the creation of the concepts within the different institutions. As Germany

²⁵ In this context, the OECD (2019: p. 2 – OECD skills strategy) argues, that “[...] Germany could benefit from a renewal of its strategic vision for the future to ensure that all of its people have the skills to respond to the challenges and opportunities of a complex and rapidly changing world, and to secure its position on global value chains. A whole-of government approach is needed to achieve this aim”.

has a long and strong tradition of academic discourse on education and learning, the adoption of the LLL concept has seen an adaptation to the German context. What is surprising however, is the perceived low resonance of the political debates and the published LLL strategies in the German academic world. What is specifically missing of the ideological grounding of the LLL strategies in Germany and the identification of potential shifts between strategies over time. The present country study tries to fill this gap by focusing on the three main strategies of the past two decades and by exploring the debates that have taken place in the time between the publication of these strategies.

Strategies goals

Starting points for the emergence of the national LLL/skills strategies - in the focus of this case study - were several fundamental changes:

- in the late nineties and the beginning 2000s there were increasing problems with regard to the traditionally smooth transition from school-to-work through the initial vocational education and training system. More and more young people were drawn into the so-called “transition system” between secondary schooling and initial VET because they could not directly enter the company-based apprenticeship system, due to a lack of apprenticeship places. This led to a general discussion about the effectiveness of the dual system and the necessity to change or incorporate local and regional actors into the governance of the system to a stringer extent.
- after the election of the Social Democratic Government that was in place until 2005 there was a significant change in the orientation of German labour market and social policies, from a “caring” to an “activating” paradigm (Dingeldey 2003). For VET this also included the introduction of the notion of “employability” a new guiding principle for education and skills policies.
- Added to this was the conviction that the state as an actor and the existing formal education system would not be able to meet the changing learning demands (see Dohmen 1996) in a more dynamic economic environment due to increasing digitalization, the gradual ageing of society, the growing shortage of skilled workers, and later the implications of climate change.

Strategy I: The “Strategy for Lifelong Learning in the Federal Republic of Germany”, 2004

The formulation of the national “Strategy for Lifelong Learning in the Federal Republic of Germany” in 2004 was a response to the developments at European level, taking up the EU-recommendation to develop and implement a strategy of lifelong learning (see EC 2001) and thus should be less regarded as a political move, then a necessary step in the

EU policy formation process. It however coincided with the reign of the Social Democratic Government under Gerhard Schröder and the change in the orientation towards activating labour market and social policies.

The strategy formulation process was initiated by the Federal-Länder-Commission (Bund-Länder-Kommission (BLK)) in 2002 with the introduction of a working group. The working group had the specific mission to propose a definition of lifelong learning and to provide an overview of the activities of the Federal Government and the Länder in the context of lifelong learning – and based on this – to propose a structuring of funding activities. The final strategy was then published in 2004 during the red-green²⁶ coalition government under Gerhard Schröder. The strategy was formulated by a group of experts lead by the BLK in a consultation process over the period of 2 years.

Due to the federal set-up of Germany and the primary responsibility of the Länder with regard to education and culture, the strategy was developed as a broad frame to guide the decision-making process over time to reach the goal of LLL in Germany. The working group responsible for the strategy explicitly refrained from issuing specific demands or recommendations for action (BLK 2004: p. 10). The declared (broad) aim of the strategy is thus to point out how learning of all citizens in all phase and all areas of life, and at different places of learning and in various forms of learning, can be stimulated and supported (ibid: p. 5). To be able to do so and following the EC Memorandum (EC 2001), the strategy defines five different phases of life (children, teenagers, young adults, adults and older people) and eight development priorities (inclusion of informal learning, self-direction, skills development, networking, modularization, learning guidance, new learning culture/ popularization of learning, and - equitable access).

The aims of the strategy are “[...] to show how the learning of all citizens can be stimulated and supported in all phases and areas of life, in different places of learning and in diverse forms of learning [...]” (ibid, p. 5, *own translation*). It defines LLL to [...] encompasses all formal, non-formal and informal learning at various learning locations from early childhood up to and including the retirement phase. Learning is understood as the constructive processing of information and experience into knowledge, insights and competences” (BLK 2004: p. 13, *own translation*). For the purpose of the strategy – as each individual is learning for different reasons, in different ways, in different places - lifelong is divided into five phases of life: childhood, adolescents, young adults, adults, and elderly.

²⁶ Coalition between SPD and Bündnis 90 / Die Grünen between 2002-2005.

The German strategy envisages a “learning society” where for the first time it was acknowledged, that learning could only take place at individual level and the individual should be supported through an enabling environment. It envisages “[a] culture of learning that meets people's needs and wishes and makes learning interesting and attractive for all age groups and sections of the population (popularization of learning) promotes the motivation and willingness of individuals to engage in lifelong learning” (ibid: p. 14, *own translation*). Hence, the strategy identifies the development of individual learning skills as well as the provision of an appropriate infrastructure as basic foundation for LLL in Germany. The strategy aims to equip the individual with competencies needed for coping with practical life and work requirements. In order to reach this goal, the strategy proposes that the existing education infrastructure must be vertically or horizontally networked across educational levels like kindergarten, school, training or further education and must be complementary built on each other (modularization). In the German context the strategy is a novum, as it not only acknowledges that learning takes place at individual level, but also explicitly demands that all structural and political decisions need to take this into account.

As the strategy is to be understood as guiding principles for future policy, neither a timeframe was defined nor quantifiable targets were set. The strategy however included a follow-up, as the DIE was commissioned to systematically process all existing measures at national and Länder level and to provide a systematic analysis of the existing literature on LLL, which were both published later.

Interestingly, compared to other LLL-strategies of LLL, no reference is made to the deeper function of LLL. Most LLL strategies begin with a description of a process of (fundamental) general change (of global, ecological, economic, political and social nature) and conclude that this general change(s) require(s) the development of a knowledge society or an integrative learning society. Hence, lifelong learning for individuals is needed to be able to adapt to the manifold challenges (Kraus 2001, p. XX). Do to the German federalism, such a derivation is missing in the 2004 strategy. Instead, the specific goals are defined regarding the educational subsystems or sectors. Another striking feature is, that the strategy refrains from sharing the (broader) objectives of the EU²⁷ which include personal fulfilment, active and democratic citizen, social inclusion, and employability/adaptability. While these broader EU objectives were integral part of

²⁷ The European Union defines lifelong learning as “[...] all learning throughout life that serves to improve knowledge, skills and competences and takes place within a personal, civic, social or employment-related perspective” (EC 2001 - *Ein europäischer Raum des lebenslangen Lernens*).

the German education reporting (Bildungsberichterstattung) from 2006 onwards (based on an order of the BMBF and KMK from 2004), these objectives – after the broad consultations during the “Forum Bildung” have not entered the final strategy. Instead, the German strategy from 2004 is focused on competencies needed for coping with practical life and work requirements, which is a much narrower target.

Similar to other LLL-strategies, the responsibility from the education systems seems to have been shifted towards individual learners (see Lima and Guimarães 2011). According to Kraus (2001: p. 107), “[t]he central methodological principle thereby is “[...] self-organization of the learning process by the learners”. While traditionally, it was the responsibility of the education system to guarantee the learning opportunities of the citizens, this responsibility – at least to a certain extent – rests with the individual.

Aftermath of the LLL strategy

Continuing Education Innovation Circle / Innovationskreis Weiterbildung / BMBF 2008

Following on from the 2004 strategy for lifelong learning and referring to previous initiatives and approaches²⁸, in 2008 the BMBF published the recommendations of the Continuing Education Innovation Circle for a strategy to organize learning throughout the life course (BMBF 2008). In this strategy, the realization of LLL is seen as a priority educational policy task in order to prepare individuals, society and the economy for future challenges, whereby the value of learning for the personal orientation, social participation and employability of the individual is particularly emphasized. The recommendations for the first time also mention the plan for a joint development of a national further education and training strategy.

Workforce Alliance / Arbeitskräfteallianz 2009; Partnership for Skilled Workers (Partnerschaft für Fachkräfte), 2014

The Workforce Alliance (Arbeitskräfteallianz) was founded in 2009 on the initiative of the BMAS. The alliance included a number of key actors which together aimed at fostering existing and introducing new co-operation mechanisms at regional level in order to ensure a sustainable supply of skilled workers. This also included the hiring of foreign workers. This initiative was followed by the “Partnership for Skilled Workers” (Partnerschaft für Fachkräfte) in 2014, which aimed at making best use of the existing (potential) labour force, with a special focus on women, older workers, low-skilled-

²⁸ Such as the high-tech strategy, the national integration plan and the qualification initiative, all of which include educational goals.

workers as well as people with migration backgrounds (see OECD 2021: p. 60). The work of the Alliance and the Partnership for Skilled Workers resulted in the launch of the (second) strategy for skilled labour in 2018 (Fachkräftestrategie).

Strategy II: Advancement through education, 2008

In the same year, under the new grand coalition headed by Angela Merkel, the federal government and the Länder together initiated a qualification initiative under the heading “Advancement through Education”. It is reasonable to assume that such an endeavour was part of the election campaign for the elections in 2009. This is supported by the fact that the final evaluation report was planned for 2015, after a possible second term and in the middle of a new legislation period (with the next upcoming elections in 2017).

The PISA-shock in 2001, where German pupils performed below average in the international student assessment conducted by the OECD, contributed to broad discussion on how to improve the learning outcomes and especially how to enhance the performance of minority groups, such as children with a migrant background, which is exemplified in the guiding principles.

Altogether the policy document encompasses ten such guiding principles. These are: (1) advancement through education; (2) better education; (3) language as the key; (4) more MINT; (5) training opportunities; (6) strengthening vocational training & qualification; (7) academic education for innovative strength; (8) LLL; (9) entrepreneurial responsibility for CET; and (10) education and VET in a federal system. The initiative can be seen as a catalogue of policy measures the federal government and the Länder could agree upon.

Skilled labour strategies 2011, 2018, 2020

In the last decade, the LLL perspective has receded into the background, while the skilled labour shortage became the centre of education and labour policies. In this context, two strategies (2011, 2022) and a concept (2017) were formulated (BMAS 2011, BR 2018, BR 2022), which were only focused on securing the skilled labour base of the future. All included a focus on further training. The first strategy for securing skilled labour for example outlines five paths that are intended to secure the skilled labour base of the future: (1) activation and securing employment, (2) better work-life balance, (3) educational opportunities for all from the outset, (4) qualification: initial and further training and (5) integration and qualified immigration. In contrast, the new 2022 strategy for securing skilled labour is more generic. With reference to the EU's Europe 2020 strategy now six fields of actions are laid out: (1) up-to-date training; (2) targeted further training; (3) raising labour potential more effectively, (4) increasing labour force participation; (5) improving the quality of work, changing the work culture; and (6) modern immigration policy & reducing emigration.

The formulation of the National Skills Strategy in 2019 is a direct follow-up from the skilled labour policies, which explicitly sees further training (qualification) as a necessity to secure a future skilled labour base.

Strategy III: The National Skills Strategy, *Continuing education and training as a response to digital transformation, 2019 and 2022*

The idea for a joint development of a national further education and training strategy first came up in 2008 (BMBF 2008 – *Empfehlungen Innovationskreis Weiterbildung*) and was followed up at different levels in working groups. Finally, in 2019, a broad alliance of federal and Länder government institutions and social partners agreed upon a common strategy for job-related CVET, which the OECD (2021: 71) believes to be more of a “[...] political compromise with scope for more ambition and coherence”. Nevertheless, all involved partners believe it to be a necessary step into the right direction as Germany suffers from rather low and unequal participation in CVET (see Bertelsmann 2024)²⁹. And the progress made between the first strategy in 2019 and the revision in 2022 is a good indicator for successful cooperation.

Similar to many LLL strategies, the National Skills Strategy of 2019 is based on the observation that the world of work is transforming substantially due to the digital revolution. In the light of the challenges it predicts massive changes in occupational and qualification profiles which imply the need for continuing education and training (CET) to secure the supply of skilled labour, to guarantee employability of all workers and to foster Germany’s innovativeness and competitiveness. (ibid, p. 2)³⁰. CET is also believed to enhance social participation and equal opportunities, as it is necessary to enable people to control their won professional lives. The strategy is aimed to help co-ordinate CET policies, to increase transparency, and to improve access to CET opportunities and financial support. The explicit goals of the strategy are to guarantee a successful structural change, to introduce a new skills culture which can become a fundamental advantage for Germany as a business location, and a new skills culture where the individual has the control over her education and employment paths and where the CET stakeholders take over more responsibilities (Körfer et al. 2023).

The strategy defines ten actions points: (1) supporting the transparency of CET opportunities and programs; (2) closing gaps in support, creating new incentives, adapting existing support systems, (3)

ensuring joined-up lifelong CET counselling nationwide and strengthening skills development counselling, particularly for small and medium-sized enterprises, (4) strengthening the responsibility of the social partners, (5) reviewing and enhancing the

²⁹ [Weiterbildungschancen in Deutschland sind regional ungleich verteilt \(bertelsmann-stiftung.de\)](https://www.bertelsmann-stiftung.de/en/press-releases/2024/03/14/weiterbildungschancen-in-deutschland-sind-regional-ungleich-verteilt); accessed 14.03.2024.

³⁰ The strategy is explicitly only focussed on job-related CET, although it is acknowledged that no clear-cut distinction to general CET can be made.

quality and quality assessment of continuing education programs; (6) increasing the visibility of and recognizing the skills acquired by workers through vocational education and training; (7) developing further training qualifications and continuing education and training programs

Strategically developing educational institutions into centres of excellence for continuing vocational education and training; (8) supporting CET staff and equipping them with the skills required for the digital transformation; and (9) strengthening strategic forecasting and optimizing statistics on continuing education and training.

Summary of strategies' goal dimension

The table below tries to highlight the main characteristics of the three strategy documents. A clear distinction between the three strategies is, that the national skills strategy from 2019/2022 is the results of a process of a range of key actors involving among others government actors at federal and Länder-level as well as the social partners.

In all three strategy documents, the individual plays the main role. All basically aim at achieving and maintaining the individual ability to work over the entire work life in times of deep structural changes. What all also have in common is that they identify a very heterogenous target groups which cannot be targeted by a one-policy-fits all strategy. Hence, all three strategies put forward solutions addressing a number of different levels. These include for example governance issues, the building of structures, the removal of barriers, the creation of opportunities, and financing etc. A clear difference between the strategies is the observable shift from a more humanistic towards a more economic perspective of the individual in the sense that learning is now less end in itself but more a means towards becoming and remaining a productive skilled worker. Moreover, all strategies have a clear orientation on EU-policies / are in line with these.

Table 7 Main characteristics of the compared strategic documents

Title	Life long learning in the Federal Republic of Germany	Advancement through education	National Skills Strategy
Date of publication	2004	2008	2019/22
Involved stakeholders	BLK	Federal government	3 ministries, all federal states through the KMK and Wirtschaftsministerkonferenz, five unions, five employer and business organisations, Federal Employment Agency,

			Federal Chancellery (Bundeskanzleramt)
Policy areas addressed	Formal, informal and non-formal learning (over the life course)	(General/basic) Education IVET CVET Employment	CVET
Influence European level	Lisbon strategy, Europe 2020, EU LLL Memorandum	Lisbon strategy, Europe 2020	European pillar of social rights, Europe's digital decade
Preceding national / regional discourses			<i>Innovationskreis Weiterbildung,</i> Workforce Alliance Partnership for Skilled Workers
Monitoring, updating mechanisms	None		Steering group, implementation committee, working groups; conference
Follow-up strategic documents	-	Final evaluation report 2015	Implementation report 2021 Strategy Update 2022

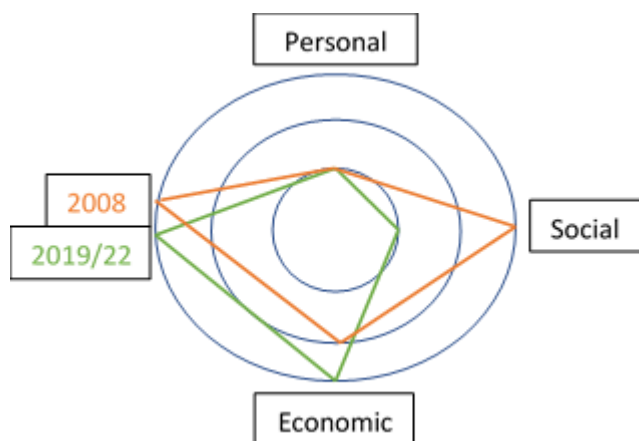
Source: Own description

The concept of LLL has triggered down from the international to the national level in Germany, but without any lasting impact at policy level. The original holistic framing of LLL (as discussed by UNESCO) covering the personal, social and economic sphere has not been able to assert itself in Germany. Although LLL is referred to in one way or another in all skill related policy documents, a thorough engagement with the concept has not taken place. Instead, due to the strong transformational pressure the securing of future skilled workers has been the centre of skills policies from 2008 onwards. Against this backdrop, skill policies have been designed from an overtly economic perspective, neglecting the personal and social dimensions of learning. This narrow outlook has not changed since, as the skilled labour policies from 2011 and 2022 as well as the national skills policy from 2019/22 exemplify.

According to Aspin and Chapman (2001, in Biesta 2011: p. 173) one can distinguish three different underlying agendas of LLL strategies, serving different functions, namely (1) LLL for economic progress and development; (2) LLL for personal development and fulfilment; and (3) LLL for social inclusiveness and democratic understanding and activity). This distinction can be used to analyse the nature of the strategies selected in this case study. As the 2004 strategy for LLL is rather generic, we shall restrict this comparison to the 2008 advancement through education and the 2019/22 national skills

strategy. As Figure 3 tries to visualize, the two strategies are clearly distinct from each other in terms of their agendas. As the title already suggest, the 2008 strategy is strongly focused on achieving equal access to education and fostering integration to the labour market for equal live chances while the 2019/22 skills strategy is overtly influenced by an economic agenda, thereby with less emphasis on personal or social aspects. It can be argued however, that the seemingly narrow focus on economic aspects such as employability does not necessarily represent a paradigm shift. In Germany, initial training in the dual system has traditionally pursued a holistic approach to education, which is why a focus on maintaining employability in continuing education can, or should, be viewed differently.

Figure 3 Underlying agendas of skills strategies



Source: own depiction

When further comparing the policy documents, a number of common elements can be identified, which can also be found in most international LLL strategy documents:

Firstly, except for the 2004 LLL strategy, all describe a process of (fundamental) general change (digital, ecological, economic, structural) and conclude that this general change(s) require(s) the development of a (continuous) learning society. Secondly, all have in common an implicit shift from education towards learning (see also Lassnigg 2009, Volles 2016), including non-formal learning (arranged learning outside the education system), as well as informal learning (learning outside of educational institutions). This, thirdly, implies a shift of responsibility from education systems towards individual learners (see Lima and Guimarães 2011) or at least the acknowledgement of the fact that education and learning cannot be conceptualised merely by policy and social partners, but that learning involves a significant of individual

agency and contingency that lies outside the sphere that can be regulated through the standardised occupations.

According to Kraus (2001: p.), “[t]he central methodological principle thereby is “self-organization of the learning process by the learners”. While traditionally, it was the responsibility of the education system to guarantee the learning opportunities of the citizens, this responsibility – at least to a certain extent – rests with the individual. Moreover, this responsibility of the individual last basically over the entire life course (i.e. lifelong learning)³¹. Sixthly, learning is overtly understood as (key) competence development and often connected to employability³². Lastly, a tendency to break down knowledge into more individually targeted smaller units (modularization) that can be certified and recognized can be observed (see also Kraus 2001).

All strategies are linked or responses to strategic EU policies. While the LLL strategy for Germany was the implementation of an EU recommendation to develop a national LLL-strategy, at least some of the targets laid out in the 2008 strategy are aligned to the EU recommendations in the context of the Lisbon strategy (2000). Furthermore, LLL has become the guiding principle of the German education reporting since 2006, which implies that changes regarding the potential action points defined in 2004 are monitored over time. Thirdly, it can be observed, that the last decade has been dominated by the discussion to secure skilled labour. In line with the more economy-centric EU policies of the recent decade, German employment and skills policies seem to have become very narrow in focus.

Indicators, actions and implementation

A first aspect which stands out is the fact, that the strategies neither built upon another, nor do they even refer to any of the previous strategies. Although the **strategy for lifelong learning in Germany from 2004** was developed with relatively much effort and has since then been fully ignored by policy makers at federal and Länder level. In fact, doing a literature search shows, that the strategy has not even been discussed or reflected in the literature much. Nonetheless, the 2004 strategy clearly reflects a paradigm change, in the sense that the greater individual learning received more attention and the diversity of players was acknowledged. As the strategy is to be understood as guiding principles for future policy, neither a timeframe was defined nor quantifiable targets were set. The strategy however included a follow-up, as the DIE was commissioned to systematically process all existing measures at national and Länder level and to provide a systematic analysis of the existing literature on LLL, which were both published later.

³¹ It has to be noted however, that the cooperate responsibility for further training is acknowledged.

³² What these basic and key competences (are and how they can be best gained), seems to be disputed (Kraus 2001), as the discussions at European level show.

The second strategy “**Advancement through education**” was elaborated under a grand-coalition (black-red) led by Angel Merkel, where the coalition partners had stable majorities in both chambers and the backing of many of the Länder. Without such a political backing at federal and Länder-level, the formulation of such a grand strategy would have not been possible. Although the formulation of the strategy was politically motivated in the sense that it was also supposed to propagate the (successful) working of the grand-coalition government, it served a clear purpose: to tackle the profound inequality regarding educational achievements. Triggers in this context were the PISA shock in 2001 and subsequent discussion regarding potential policy measures.

The policy document goes further than many other skills policy documents in two ways: Firstly, the document is ambitious as over 60 actions points are defined across a range of fields and secondly, some of the targets are quantified and the success of the initiative measurable. These include among other things the target to increase state expenditure on education (to 10% by 2015), to increase participation in further training from 43% to 50%, the halving of school leavers with a qualification / vocational qualification from 8% to 4% and from 17% to 8.5% by 2015, the expansion of the Upgrading Training Act, a continuing education campaign, the modernization of training regulations (through the merging of training occupations into occupational groups with core qualifications and specialization options), the turning of transition into training periods, and others.

The evaluation report from 2015 (unsurprisingly) evaluates that the measures have been a success (KMK/GWK 2015), as most goals have been reached or are on a positive way. Critical views however point out, that the devil lies in the detail. While it seems that most targets are reached or are on a positive way, the situation changes, when disadvantaged groups are put in the focus of the analysis. For example, while it is seen as a success, that on average, around a third of all children under the age of three visit some kind of day care, the situation looks different for children from families with a migration background and children with parents with low educational status. The former group reaches a childcare quota of 20% the latter group a quota of 16.4 % in 2015 (Klemm and Anbuhl 2018). In Germany, substantial educational inequalities between people with different social backgrounds exists in all areas of education – from early childhood education, in the school system, in VET, in higher education, as well as in further education. Thus, the inequality of educational opportunities remains a central problem in Germany.

The 2008 strategy clearly sets a number of quantified targets to be achieved by 2015. These – according to the final evaluation report – have been almost all either nearly achieved or overachieved, but do not stand close scrutiny, as the table below tries to show. In the update of the national skills policy in 2022, the target of increasing participation in CET to 65% was quantified. Other aspects to consider are - apart from the question whether the quantified targets have been achieved – to what extent the

strategies have initiated a paradigm change, and to what extent the process of strategy formulation is a goal in itself.

Table 8 Quantified targets in the 2008 strategy and their achievement by 2015 (reporting year)

Quantified targets (by 2015)	Achievement (reporting year 2015) according to government	Klemm and Anbuhl 2018
Increase education and research expenditure to 10% of GDP	9,2% in 2013	
Average childcare provision of children under 3 years of age of 35%	32,9% in 2015	20% for children with migrant background and 16,4% for children with parents with low educational levels in 2016/17
Halve the number of school leavers with no qualifications / vocational qualifications from 8% to 4% and from 17% to 8.5%	School leavers with no qualification – 5,7% No vocational qualification – (not reported)	School leavers with no qualifications are at 6,5% in 2017; around 45% of those leaving school without a qualification attended a special school 15% of all people aged 20 to 30 are without a VET qualification
Average first-year university student rate of 40% per year	Around 50% in 2015	University education participation is largely determined by social background: participation rate for students where both parents do not hold an education degree, lies at 12%
Participation in further training from 43% (2006) to 50 per cent	51% in 2014	Higher participation in further training among people without migrant background (51%) compared to people with migrant background (43%)

Source: Klemm and Anbuhl 2018.

In sum, despite the ambitious goals and action points formulated in the strategy, not much was finally achieved. The final evaluation report published in 2015 was overtly positive regarding the achievements (with either goal reached or being on track to reaching the goal), but does not stand up to closer scrutiny. While achievements can be reported at all levels, the inequality of educational opportunities remains a substantial problem.

In each of the ten actions points of the **National Skills Strategy**, no quantifiable targets are defined. Instead, the stakeholders list current or planned measures / activities and /

or commit to either extend existing or implement new measures. The strategy also aims at institutionalizing the communication and cooperation between the involved stakeholders through regular binding exchange meetings. For example, following up on the strategy, within four thematic laboratories, concrete solutions and recommendations regarding strategic foresight and analytical tools, literacy and basic skills, counselling structures and education, as well as quality assurance in CET were developed. Furthermore, the working group "Employment conditions for continuing education staff in publicly funded continuing education" and a federal-Länder committee was set up.

In 2021 a first implementation report was published. In this report an overview is given over the achievements of the involved stakeholders regarding the ten action points. The report further defines, what needs to be done in the future. In line with the OECD recommendations, this includes a greater to and promotion of low-skilled individuals with a low level of participation in further training and increased coherence between existing support programmes and an overall further increase in investment in CET. (ibid, p. 65). Moreover, four cross-cutting issues are identified which need to be tackled. These are (1) facilitating access to counselling, support and further education offers; (2) deepening co-operation in regions and sectors; (3) further developing concepts for the skills of the future, qualification planning in the and company and collectively agreed approaches to strengthen further training; and (4) strengthening digital continuing education with more transparency and innovative learning opportunities.

Following the implementation report the national skills strategy was extended in 2022 to include general further education and training where interfaces with professional CET exist. Apart from introducing some new measures, especially the steering structure with a steering board, four implementation committees and five working groups are constituted. The 2022 revision also includes the quantitative target of increasing participation in CET to 65%.

As laid out in the implementation report, the national skills strategy serves to provide clear impetus, intensify the cooperation between the various stakeholders, to further develop CET, and to strengthen the culture of CET in Germany (p. 11). The NWS can thus be seen as an important step towards greater co-ordination and co-operation between key actors in the area of CET policy and is widely appreciated by the involved partners (OECD 2021: p. 58).

Italy

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Box 7 Analyzed strategic policy documents for Italy

Code: IT1	Analyzed strategic policy document: National Guidelines for Lifelong Guidance (2014)	Timeline: 2014-	Implementation: Limited
Code: IT2	Analyzed strategic policy document: National Guidelines for the Dual System of Training (2019)	Timeline: 2019-	Implementation: Limited

Overview & context

The rapid evolution of the skills required by the labour market has generated widespread debate in Italy, highlighting the challenges that educational systems face in keeping pace with these changes. A clear disparity has emerged between the skills demanded by employers and those possessed by the workforce across various sectors. This mismatch complicates both the recruitment of qualified personnel by employers and the opportunities for workers to find suitable employment. Educational and training strategies can play a crucial role in bridging these gaps; this report examines two skill strategies implemented in Italy.

Two strategic policy documents are analyzed in this case study. This includes the 2019 "National Guidelines on Lifelong Orientation" (Linee guida nazionali per l'orientamento permanente) and the 2019 "Guidelines on Pathways for Transversal Skills and Orientation (PCTO)" (Percorsi per le Competenze Trasversali e per l'Orientamento, Linee guida). Both of them have to be seen in the context of reforms that have moved the Italian education system closer to dual training systems observed in other countries. Upper secondary education in Italy offers both academic tracks, known as *Licei*, and vocational tracks, which include technical schools (*Istituti Tecnici*) and professional schools (*Istituti Professionali*)³³. Tertiary education is provided by universities, higher technological institutes (*ITS, Istituti Tecnologici Superiori*), and institutes for advanced artistic training (*Afam, Alta Formazione Artistica, Musicale e Coreutica*) (Eurydice, 2022). In the early 2000s, an education model known as "Alternanza Scuola Lavoro" (ASL) was introduced, combining classroom instruction with practical work experience. Initially voluntary, ASL became mandatory for all high school tracks under Law 107/2015. With the introduction of mandatory ASL, some concerns arose, particularly regarding student safety in

³³ The Italian education system is predominantly public and covers levels from pre-primary to post-tertiary. Compulsory education, which is provided free of charge, spans from the sixth to the sixteenth year of age and includes primary education, lower secondary education, and the initial two years of upper secondary education.

workplaces and the potential "corporatization" of the school system, with academic schools expressing particular reservations (IT#1). In December 2018, with the enactment of Law 145, ASL was restructured and renamed "Pathways for Transversal Skills and Orientation" (PCTO, Percorsi per le Competenze Trasversali e l'Orientamento). While maintaining the core principle of alternating formal education with practical experiences, PCTO was accompanied by a reduction in minimum hour requirements, especially for academic schools; additionally, its primary focus shifted towards the development of transversal skills, to help students effectively navigate between different educational and professional opportunities. The 2019 "Guidelines on Pathways for Transversal Skills and Orientation (PCTO)", involves an educational model that integrates formal education with on-the-job learning experiences. This approach aims to facilitate the acquisition of skills highly valued in the labour market, thereby enhancing individuals' employability. However, importance of student orientation extends beyond PCTO. Already in 2014, the Ministry of Education issued "National Guidelines on Lifelong Orientation", focuses on enhancing the orientation system, which aims to assist individuals as they navigate their educational and career pathways.

Strategies goals

The "National Guidelines on Lifelong Orientation" were introduced on February 19th, 2014, through Ministerial Note No. 4232, signed by the Minister of Education, University, and Research. These guidelines represent an evolution of the previous set issued in April 2009 (Ministerial Circular No. 43). They emerged from a collaborative effort involving both public and private actors, in particular the national government, regions, and local authorities; specifically, these entities reached an agreement in December 2013, titled "Definition of the Guidelines for the National Lifelong Orientation System" (Definizione delle linee guida del sistema nazionale sull'orientamento permanente).

The primary objective of the new guidelines is to shift student orientation from a purely informational approach to a system that promotes the acquisition of skills necessary for informed decision-making throughout life. Effective orientation is important since it can contribute to preventing school dropout rates and reducing skill mismatches in the labour market. Within this orientation framework, schools play a pivotal role by offering appropriate and high-quality support to students. They are also responsible for actively engaging families and establishing collaborations with various experts in the field of orientation.

The 2014 guidelines on orientation are in line with and draw inspiration from key strategies such as "Lisbon 2010" and "Europe 2020," as well as the "Bruges Communication" of 2010. Additionally, they align with the EU Council Recommendation of April 22, 2013, which was nationally implemented through the "Youth Guarantee" plan (Garanzia Giovani).

The 2014 guidelines are also referenced in the "Guidelines on Pathways for Transversal Skills and Orientation (PCTO)", established by Ministerial Decree No. 774 on September 4th, 2019, and signed by the Minister of Education, University, and Research. The main aim of the 2019 "Guidelines on PCTO" is to foster the development of transversal skills that assist individuals in shaping their educational and professional trajectories. These skills have become increasingly relevant due to the rapid transformations in the labour market and the growing skill disparities between labour supply and demand.

Similarly to the 2014 guidelines on orientation, the 2019 guidelines on PCTO underscore the role of schools in student orientation. Schools are granted the flexibility to implement diverse PCTO experiences, tailored to their specific educational needs and contexts. These experiences aim at encouraging students to reflect on themselves and their future opportunities, rather than focusing solely on the development of technical skills.

The PCTO guidelines mention several educational initiatives related to skill development and orientation. For instance, they refer to the "Skills Agenda for Europe" launched in 2016, the 2018/C189/01 Recommendation outlining essential skills for lifelong learning, as well as the European standards for language proficiency (2017 CEFR), digital skills (2017 DigComp), and entrepreneurship (2016 Entre-Comp), and the 2017 "European Qualifications Framework" (EQF), which serves as a tool to standardize educational qualifications across Europe.

Finally, the guidelines highlight the social aspect of these educational initiatives: education is a basic right for all citizens, a principle that is recognized by the 2017 "European Pillar of Social Rights" and echoed by the United Nations' 2030 Agenda for Sustainable Development.

Indicators, actions and implementation

The 2014 guidelines on orientation indicate that schools should offer appropriate and targeted orientation. Each school should define minimum standards for orientation within its Three-Year Educational Offer Plan (PTOF, Piano Triennale dell'Offerta Formativa), integrating this aspect consistently into the local context.

Schools can provide support for student orientation through orientation teaching initiatives (didattica orientativa), and counselling activities (azioni di accompagnamento e consulenza orientativa). Orientation teaching focuses on building basic orientation skills during classes, while counselling activities are carried out outside of lesson time, offering a more personalized support. Another crucial aspect emphasized by the guidelines is the need to create opportunities for students to meet the world of work; the

interaction can occur through company visits, internships, or other practical experiences, which may help students acquire soft skills.

Orientation initiatives should be effectively monitored and tracked; the guidelines suggest the creation of an online tool to document students' educational paths since childhood (e-portfolio). An important figure in the student orientation system should be the orientation tutor, tasked with coordinating orientation actions. All teachers should be provided with continuous training on orientation.

The practical implementation of these recommendations has encountered challenges; the orientation system, centred on schools, often faces difficulties in collaborating with other key actors such as companies, post-diploma training centres, and employment service providers. This difficulty can be partly attributed to a general mistrust by schools towards the business world, which is sometimes perceived as distant from educational and orientation needs. In particular, academic schools appear to generally exhibit greater mistrust than technical and vocational schools when it comes to collaborating with companies (IT#2).

The 2019 guidelines on PCTO indicate that schools have the flexibility to organize various types of PCTO experiences based on the context and educational needs of the students. The guiding principle behind PCTO is learning through experience, adopting a "learning-by-doing" approach. Transversal skills can play an important role in student education since they can be applied to a variety of tasks and contexts, preparing students to successfully navigate the complexity and dynamism of professional and personal situations.

However, a potential weakness in the implementation of the guidelines may arise directly from the still-debated definition of transversal skills (IT#1). Internationally, several different proposals exist for classifying transversal skills. For instance, the guidelines report that the May 2018 Recommendation of the European Council identifies a matrix of fundamental transversal skills, which include four main competences: (i) personal and social competence and learning-to-learn skills, (ii) citizenship competence, (iii) entrepreneurial competence, and (iv) competence in cultural awareness and expression. Besides these, the guidelines also mention two other relevant classifications, namely those proposed by the Excelsior project (Unioncamere – ANPAL – Progetto Excelsior – Sistema informativo per l'occupazione e la formazione – 2017) and the World Economic Forum.

The design process for PCTOs begins with identifying the competencies to be acquired by the student. The Class Council, comprising teachers, two student representatives, two parent representatives, and the school principal, is responsible for designing PCTOs. Collaboration between the Class Council and Disciplinary Departments during the

design phase helps ensure the coherence of PCTOs with PTOF. Additionally, involving students in the design process encourages them to reflect on their preferences, abilities, and expectations. Similar to designing PCTOs, monitoring and evaluation of PCTOs are also a responsibility of the Class Council.

Monitoring processes can utilize resources such as rubrics, observation sheets, and digital tools. An effective monitoring system should be established through an agreement between the school and external organizations, when PCTOs are conducted outside the school premises. It is the school's responsibility to ensure that such external structures guarantee student safety. In these instances, both an internal tutor and an external tutor are appointed. The internal tutor, designated by the school, maintains contact with the Class Council and other school bodies to ensure effective coordination and information sharing. The external tutor serves as the student's reference figure at the hosting organization, provides training on specific workplace risks, and organizes activities in line with the established educational objectives.

The guidelines suggest two types of evaluation for PCTOs: process and outcome evaluations. Process evaluation, which allows for necessary corrections and adjustments during intermediate stages, focuses on observing the evolution of the experience, considering students' behaviours. Outcome evaluation begins by clearly defining the competencies to be acquired and verifying those already possessed by the student; it continues with monitoring students' progress during intermediate stages and concludes with a final evaluation when the student has completed the PCTO experience. The Class Council conducts the final evaluation of competences before the student's admission to the State exam, considering information provided by both internal and external tutors. This evaluation contributes to determining teachers' grading proposals.

The outcomes of the PCTO are certified through a document attached to the high school diploma, providing a detailed description of the competencies, knowledge, and extracurricular activities undertaken during the educational path.

Both the PCTO system and the ASL system face a challenge related to the lack of systematic planning for assessing the program impact on labour and educational outcomes. No impact evaluations of ASL/PCTO systems have been conducted to date. However, anecdotal evidence suggests that ASL/PCTO programs have had a more substantial impact in educational contexts where established collaborations with external organizations already exist, such as technical and professional schools. In contrast, for academic schools, the program's effectiveness may be less pronounced. Differences in impact may not only be related to the type of school but also to geographical location and the level of commitment of schools to the program (IT#1).

The documents discussed in this report, the 2014 guidelines on orientation and the 2019 guidelines on PCTO, exhibit similarities that highlight their focus on some educational priorities: both sets of guidelines emphasize the importance of developing skills that extend beyond technical abilities. Additionally, they both promote gaining practical experience.

The 2014 guidelines on orientation have been replaced in December 2022 by newly adopted directives (Ministerial Decree No. 328). These updated guidelines introduce several changes. For example, they present new tools for orientation, such as a unified digital platform for orientation, and incorporate a system for certifying competencies at the end of each academic year within the second cycle of education. Moreover, these guidelines promote teacher training initiatives and the introduction of e-portfolios to improve record-keeping.

The PCTO remains a component of the Italian education system. However, the future of VET in Italy is currently debated. It is possible that school-work-alternation programs may become an even more integrated part of VET, while the academic track may remain unchanged or undergo minor modifications (IT#1).

For future policy development, it is crucial to plan for systematic evaluation of programs, before their implementation. Such evaluations will enable a rigorous assessment of the achieved outcomes, ensuring alignment with predefined objectives.

Additionally, continuous efforts are required to establish a common definition of transversal skills and to foster collaboration among all key actors involved in the education and training processes.

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Italy

Lifelong learning

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Annex I – Support material

Template interview questions

Illustrative selection of interview questions

These template interview questions acted as a starting point for country researchers in developing their own interview questions tailored to the respective country context for semi-structured interviews. Questions were translated, amended, with some questions partly being dropped and some questions partly being added according to country context and depending on the respective gaps in knowledge/gaps noticed when applying the analytical framework that could not be addressed with desk research.

- Please tell us something about your role in your institution and how you were involved in strategy XYZ.
- Why was the strategy XYZ needed? In other words, which problems were addressed with the strategy?
- Who was the driving force/lead-actor (e.g. ministry) in creating strategy XYZ?
- According to your assessment, did the strategy help to address these problems? Why/Why not?
- According to your assessment, what was the main added value of the strategy?
- According to your assessment, what were the main facilitators that helped implementing the strategy?
- According to your assessment, what were the main barriers for implementing the foreseen actions/action XYZ of the strategy?
- Which fields of action of the strategy would you assess as particularly successful/particularly unsuccessful? Please give some examples, and highlight why.
- [If applicable] What were the reasons for not including any quantitative targets in the skills strategies?
- [If applicable] What were the reasons for not including any specific actions for goal XYZ in the skills strategies?
- Does strategy XYZ build upon the goals and/or actions of previous strategies in the field of skills policies? If yes, on which specifically?
- According to your assessment, does strategy XYZ apply fundamentally different foci than previous strategies in the field of skills policies? If yes, which? And how could this change in orientation be explained?
- How could shortcomings of the past strategy XYZ be avoided when designing and implementing future strategies? In other words, what are the lessons learned?
- Are new skills strategies currently planned? What can already be said about these plans?

Could you refer to additional, openly accessible reports, articles, etc. on strategy XYZ that might be helpful for our project?

Pre-filled Template Analytical Framework for Country Research Teams – Guidelines for application

Please fill out the cells of the analytical framework table below for each of the analyzed skills/lifelong learning strategies. Insert the respective information as indicated in the table (columns 3-7)³⁴:

- Which goals the strategy presents with regard to a respective issue area
- If quantitative indicators are defined on how to capture progress on goals
- If actions proposed to follow up on goals
- If the actions to follow up on goals been implemented
- If progress against indicators has been achieved/if quantitative targets have been reached

Please insert the respective information in the red, yellow or green cells depending on if the goal/indicator/action's *orientation* (column 2) aligns more with economic goals (red), social & personal/human development goals (green) or both (yellow). You can use the yellow cells first and foremost for aspects that you cannot clearly associate to either economic or social & personal development goals. The already inserted examples in the analytical framework table below have been created deductively based on a wide range of literature from academic and applied research³⁵, with examples in the table inserted for purely illustrative purposes. Please delete the examples that have been inserted for illustrative purposes if they are not included in the respectively analyzed skills/lifelong learning strategies. The analytical framework has also been structured into several "issue areas" (i.e. topics - indicated in the first column) that built upon issue areas identified in the European Union's Skills Agenda and the OECD Skills Strategy framework (European Commission, 2020b; OECD, 2019) (see annex). We structured the framework into the following issue areas/topics:

1. Vocational education and training (IVET, CVET)
2. General and higher (academic) education
3. Governance and coordination; Stakeholder/social partner involvement
4. Skills for life & skills to cope with structural transitions (basic skills, green skills, digital skills, transversal skills, entrepreneurship skills)
5. Skills information systems: Anticipating/forecasting skills

³⁴ The respective columns have been developed based upon previously used approaches for analyzing strategic policy documents, in particular the S.M.A.R.T. criteria (Aubrechtová; Semančíková and Raška, 2020; Doran, 1981)

³⁵ Boyadjieva/ Ilieva-Trichkova 2021, Dean et. al 2005, Munoz 2022, McGrath et al. 2022, Oliver et al. 2019, Diaz et al. 2020, Nussbaum, 2011, OECD 2018 , Cedefop forthcoming, Lopez 2012, Oliver et al, 2019, Bryson 2015, Bonvin 2012, Rodriguez-Soler/Verd 2018, Otto/Edgell/Bonvin/Atzmüller 2017, Vero 2020

6. (Career) guidance and validation

You can inductively add additional issue areas in order to cover all of the most important issue areas considered by the respective skills strategy/lifelong learning strategy in your country, in case the strategies' breadth cannot be covered solely by the issue areas already included in the framework. One completed analytical framework table per skills strategy (strategic policy document) analyzed should be included in the Annex of each case study. Please use the completed analytical framework table as a tool to write the sections 3 and 4 of your case study. For more information, see case study template.

Name of Skills/lifelong learning Strategy: [Insert]						
Indicated duration of Skills/lifelong learning Strategy: [Insert]						
Issue area	Orientation	Which goals does the strategy outline with regard to the respective issue area?	Are actions proposed to follow up on goals?	Are quantitative indicators defined on how to capture progress on goals/actions?	Have the actions to follow up on goals been implemented?	Has progress against indicators been achieved/quantitative targets reached?
		Please list goals below	If yes, list actions, timeline and responsibility indicated in strategy (e.g., ministry, agency, social partner.)	If yes, list indicators and envisioned goals and timeline	If yes, list actions and date of implementation. If no, describe main barriers to implementation (if known)	If yes, list reached targets. If no, describe main barriers to reaching targets (if known)
1. Vocational education and training (secondary and higher; IVET and CVET)	Aspects depicted as of mainly economic importance	<p><i>For example,, is up- and reskilling in the area of VET is seen as vehicle to:</i></p> <ul style="list-style-type: none"> - <i>raise productivity and income</i> - <i>Satisfy skill needs of firms</i> - <i>Resolve skill mismatches and skill shortages in the economy</i> - <i>Ensure economic growth</i> 	<p><i>For example</i></p> <ul style="list-style-type: none"> - <i>Introduction of new (co-)funding opportunities for CVET, including individual learning accounts, or free of charge provision</i> - <i>Introduction of new apprenticeship programs/reform of existing programs</i> - <i>Procedures for validation of non-formal and informal learning within the VET system for particularly sought after occupations</i> - <i>second-chance VET programs focused on certain economic priority professions/occupations</i> 	<p><i>For example</i></p> <ul style="list-style-type: none"> - <i>GDP growth</i> - <i>Number of job vacancies demanding VET profile</i> - <i>Number of individuals in VET/number of VET graduates</i> - <i>Employment rates of VET graduates</i> - <i>Number of participants in new/reformed programs</i> 		

			<ul style="list-style-type: none"> - obligatory up/reskilling programmes for the unemployed <p>Etc.</p>			
	Aspects depicted as of importance for both economic and social & personal/human development aims	<ul style="list-style-type: none"> - G.1.1 reduce risks of unemployment [also relevant for 2. General Edu] - increase individuals' employability/facilitate labour market integration (commodification) - enable academically weaker individuals to participate in economy and society - Increase the quality of vocational education and training - Improvement of provider infrastructure in VET 	<p>For example</p> <ul style="list-style-type: none"> - Introduction of new (co-)funding opportunities for CVET including individual learning accounts, micro-credentials, or free of charge provision, in particular for the unemployed - Reform/Introduction of new second-chance VET programs, in particular for the in particular for the unemployed - Reform of existing training programs to increase quality - Introduction of new funding streams to learning providers - voluntary up/reskilling programmes for the unemployed 	<p>For example</p> <ul style="list-style-type: none"> - wage level of VET graduates - Employment rates of graduates/participants of new/reformed programs - Number of participants in new/reformed programs - Number of individuals in VET/number of VET graduates 	-	-
	Aspects depicted as of importance for social & personal/human	<ul style="list-style-type: none"> - increase well-being in general, life satisfaction - enable self-realisation/personal growth, individual autonomy, 	<p>For example</p> <ul style="list-style-type: none"> - Introduction of new (co-)funding opportunities for CVET, with special attention to different 	<p>For example</p> <ul style="list-style-type: none"> - subjective well-being - self-reported health - Gini coefficient 	-	-

	development aims	<ul style="list-style-type: none"> - enhance democratic and societal participation/active citizenship/ensure responsible, economically, socially and politically engaged citizens - enhance health, security, life satisfaction - enable valued employment & getting recognition - reduce risks of social exclusion over the life course (beyond the reason of unemployment) - overcoming class/wealth/gender/race barriers - Promote social cohesion and reducing societal inequalities, enhancing social/educational (upwards) mobility - Sustainable social development - to provide skills beyond paid work, including care work - to become independent of employers and market forces (decommodification) and resilient to external trends (e.g., changing skill needs) - to overcome structural obstacles and patriarchy - 	<ul style="list-style-type: none"> (disadvantaged) social groups, taking into account their social position - second-chance VET programs free of choice, with special attention to different (disadvantaged) social groups, taking into account their social position - Introduction of new apprenticeship programs/reform of existing programs with special attention to different (disadvantaged) social groups, taking into account their social position; and to increase the inclusiveness of the learning process - Procedures for validation of non-formal and informal learning within the VET system, with special attention to different social groups 	<ul style="list-style-type: none"> - Poverty/at risk of poverty levels - Employment rates for VET graduates for specific (disadvantaged) social groups - Number of individuals in VET/number of VET graduates from specific (disadvantaged) social groups - wage level of VET graduates from specific (disadvantaged) social groups - share of graduates in non-standard jobs involuntary part-time, etc. - indicators on job quality of graduates - indicators on political/social participation 		
2. General and higher (academic) education	Aspects depicted as of mainly economic importance	<p>For example, is up- and reskilling in the area of general and higher (academic) education is seen as vehicle to:</p> <ul style="list-style-type: none"> - raise productivity and income - Satisfy skill needs of firms - Resolve skill mismatches and skill shortages in the economy 	<ul style="list-style-type: none"> - Introduction of new co-funding opportunities for HE, or free of charge provision, in particular in degrees for highly sought-after jobs - Introduction of new shorter courses (micro 	<p>For example</p> <ul style="list-style-type: none"> - GDP growth - vacancy rates of jobs demanding HE profile - Number of graduates - Employment rates of graduates 	-	-

		<ul style="list-style-type: none"> - Ensure economic growth and innovation 	<ul style="list-style-type: none"> credentials) in particular for the employed - Procedures for validation of non-formal and informal learning within the general education/HE system, in particular in degrees for highly sought-after jobs 			
	Aspects depicted as of importance for both economic and social & personal/human development aims	<ul style="list-style-type: none"> - reduce risks of unemployment - increase individuals' employability/facilitate labour market integration (commodification) - Increase the quality of HE - Improvement of provider infrastructure of HE /general adult learning - 	<ul style="list-style-type: none"> - Introduction of new co-funding opportunities for HE/ generally oriented AL programs, or free of charge provision - Reforms to increase quality of HE provisions/generally oriented AL programs - Introduction of new funding streams to learning providers - Procedures for validation of non-formal and informal learning within the general AL or HE system - Introduction of new funding streams to learning providers 	<ul style="list-style-type: none"> - wage level of graduates - Employment rates of graduates - Number of participants - Number of graduates 	-	-
	Aspects depicted as of importance for social & personal/human development aims	<ul style="list-style-type: none"> - increase well-being in general, life satisfaction - enable self-realisation/personal growth, individual autonomy, - enhance democratic and societal participation/active citizenship/ ensure responsible, economically, 	<ul style="list-style-type: none"> For example - Introduction of new (co-)funding opportunities for HE, with special attention to different (disadvantaged) social groups, taking into 	<ul style="list-style-type: none"> - Gini coefficient - Poverty/at risk of poverty levels - Number of HE graduates from specific 	-	-

		<p><i>socially and politically engaged citizens</i></p> <ul style="list-style-type: none"> - <i>enhance health, security, life satisfaction</i> - <i>enable valued employment & getting recognition</i> - <i>reduce risks of social exclusion over the life course (beyond the reason of unemployment)</i> - <i>overcoming class/wealth/gender/race barriers</i> - <i>Promote social cohesion and reducing societal inequalities, enhancing social/educational (upwards) mobility</i> - <i>Sustainable social development to provide skills beyond paid work, including care work</i> - <i>to become independent of employers and market forces (decommodification) and resilient to external trends (e.g., changing skill needs)</i> - <i>to overcome structural obstacles and patriarchy</i> - 	<p><i>account their social position</i></p> <ul style="list-style-type: none"> - <i>Programs reaching out to different (underserved) social groups to increase their participation in HE</i> - <i>Procedures for validation of non-formal and informal learning within the general education/HE system, with special attention to different social groups</i> - <i>Measures to increase the inclusiveness of the learning process</i> 	<p><i>(disadvantaged) social groups</i></p> <ul style="list-style-type: none"> - <i>Employment rates of HE graduates from specific (disadvantaged) social groups</i> - <i>wage level of HE graduates from specific (disadvantaged) social groups</i> - <i>share of graduates in non-standard jobs, involuntary part-time, etc.</i> - <i>indicators on job quality of graduates</i> - <i>indicators on political(social) participation</i> 		
<p>3. Governance and coordination; Stakeholder/social partner involvement in skills policies</p>	<p>Aspects depicted as of mainly economic importance</p>	<p><i>For example, is stakeholder/social partner involvement seen as a vehicle to</i></p> <ul style="list-style-type: none"> - <i>Keep up- and reskilling close to labour market needs and respectively employer needs</i> 	<ul style="list-style-type: none"> - <i>Introduction of governance bodies mainly with employer involvement</i> - <i>Creation of advisory bodies including employers</i> - <i>Introduction/strengthening of work-based learning/apprenticeships</i> - <i>Cooperation mechanisms between education providers and employers</i> 	<ul style="list-style-type: none"> - <i>Number of curricula reformed with employer involvement</i> - <i>number of meetings held by employer advisory bodies for skills</i> 		

			- <i>Reform of curricula with employer involvement</i>			
	Aspects depicted as of importance for both economic and social & personal/human development aims	-				
	Aspects depicted as of importance for social & personal/human development aims	<ul style="list-style-type: none"> - <i>Enable co-determination by wider groups of stakeholders and vulnerable groups, including employee representatives/unions, student/learner organizations, teacher representatives, third sector</i> - <i>Keep up-and reskilling close to needs of overall society</i> 	<ul style="list-style-type: none"> - <i>Introduction of governance bodies with employer and union involvement</i> - <i>Inclusion of wider stakeholder groups in governance bodies (learners, teachers, youth representatives etc.)</i> 	<ul style="list-style-type: none"> - <i>Number of curricula reformed with wider stakeholder involvement</i> - <i>number of meetings held by advisory bodies for skills</i> 		
4. Skills for life & skills to cope with structural transitions (Basic/core skills, digital skills, green skills, life skills, transversal skills,	Aspects depicted as of mainly economic importance [=basic, digital, green, transversal and entrepreneurship skills [but less life skills facilitating citizenship (see green cell below)]	<ul style="list-style-type: none"> - <i>digital, green, transversal and entrepreneurship skills to satisfy increasing demand for such types of skills on the labour market/by firms</i> - <i>Basic skills to expand the labour force (goal: integration of ‘unused’ groups into the standard labour market, e.g., those with low levels of basic and digital skills)</i> - <i>to carry out existing work practices to facilitate innovation</i> - <i>Tendency to prioritize specific skill needs of firms over portable skills</i> - <i>To achieve economic growth</i> 	<ul style="list-style-type: none"> - <i>training programs for digital/green /transversal/ entrepreneurship skills particularly for the employed/ for firms</i> - <i>Basic skills programs focused foremost on labour market integration (potentially obligatory)</i> - <i>Sheltered employment/subsidized jobs (obligatory)</i> - <i>Reform of curricula taking into account digital/green /transversal/</i> 	<ul style="list-style-type: none"> - <i>Entrepreneurship rate</i> - <i>Number of individuals in training programs for digital/green /transversal/ entrepreneurship skills particularly for the employed/ for firms</i> - <i>Employment rates of individuals in programs</i> - <i>Number of curricula reformed with special</i> 		

<p>entrepreneurship skills)³⁶</p> <p>[when applying the framework, make clear reference within the cells which of these types of skills are referred to in the strategy]</p>		-	<p><i>entrepreneurship skills particularly</i></p> <p>-</p>	<p><i>regard to digital skills/green skills/life skills, transversal skills, entrepreneurship skills</i></p> <p>- <i>Share of individuals lacking basic/core skills, digital skills, green skills, transversal skills, entrepreneurship skills</i></p>		
	<p>Aspects depicted as of importance for both economic and social & personal/human development aims</p>	<p>- <i>To facilitate labour market integration of the disadvantaged (goal: integration into the standard labour market)</i></p> <p>- <i>to keep up with changing world of work (e.g., by learning to learn, adapt to new circumstances, change jobs, etc)</i></p>	<p>- <i>Basic skills programs focused on labour market integration</i></p> <p>- <i>training programs for digital/green /transversal/ entrepreneurship skills particularly</i></p>	<p>- <i>Employment rates of individuals in programs</i></p> <p>- <i>Number of curricula reformed with special regard to digital skills/green skills/life skills, transversal</i></p>		

³⁶ Transversal skills are “learned and proven abilities which are commonly seen as necessary or valuable for effective action in virtually any kind of work, learning or life activity” and not exclusively related to a particular job/occupation/discipline, including thinking, self-management, social and communication skills, physical and manual skills, life skills and core skills and competences (similar terms used are soft skills, non-cognitive skills, and socio-emotional skills). Core skills or basic skills and competences are defined as the “ability to understand, speak, read and write languages, to work with numbers and measures and use digital devices and applications”. Green skills are defined as the skills “needed to live in, develop and support a society which reduces the impact of human activity on the environment”. Digital skills are defined as the ability to make “use of, and engage with, digital technologies for learning, at work, and for participation in society”. Entrepreneurship skills are defined as the ability “to act upon opportunities and ideas and to transform them into values for others”. Life skills overlap with transversal skills, entrepreneurship skills and green skills and are defined as skills “to process and use knowledge and information which has transversal significance and facilitates active citizenship”, allowing individuals to “manage knowledge and information and use it as a basis for [...] personal/professional progression and social responsibility”, including entrepreneurship and financial skills, health-related skills, cultural skills, civic skills, and environmental skills. (Cedefop, 2012, 2023b).

		<ul style="list-style-type: none"> - to align provided skills with current priorities set by economic and environmental policy (e.g., digital transition) - to retrain individuals from declining sectors (e.g., manufacturing) to politically prioritized sectors (e.g., ICT sector, renewable energy, etc.) - to prevent individuals' dependency on employer (or least ensure portability between workplaces within same occupational domain) - 	<ul style="list-style-type: none"> - Sheltered employment/subsidized jobs (voluntary) - 	<ul style="list-style-type: none"> - skills, entrepreneurship skills - Wage level of graduates of programs - Entrepreneurship rate - Share of individuals lacking basic/core skills, digital skills, green skills, transversal skills, entrepreneurship skills 		
	<p>Aspects depicted as of importance for social & personal/human development aims</p> <p>[=basic, digital, green, transversal and entrepreneurship skills and additionally life skills that facilitate citizenship (including health-related skills, cultural skills, civic skills, and</p>	<ul style="list-style-type: none"> - Skills to participate in economy and society, achieve personal growth, self-fulfilment and identity - to enable continued participation in an increasingly digitized society - to enable continued participation in an increasingly digitized public administration/democratic system - to improve work practices and working conditions (e.g., working remotely, reconciling work and family, etc.) - to enable critical thinking and development - to ensure democracy and participation - to support and actively contribute to "just transitions" (e.g., a social just green and digital transition) - to overcome traditional barriers of class, wealth, gender or race - to facilitate social and emotional development 	<ul style="list-style-type: none"> - Basic skills programs with special attention to different (disadvantaged) social groups - training programs for digital/green /transversal/ entrepreneurship skills with special attention to different (disadvantaged) social groups - Reform of curricula taking into account digital/green /transversal/ entrepreneurship skills with special attention to different disadvantaged social groups - Introduction of programs facilitating "life skills" (including health-related skills, cultural skills, civic skills, and environmental skills) 	<ul style="list-style-type: none"> - Entrepreneurship rate according to different (disadvantaged) social groups - Number of individuals in basic skills programs with special attention to different (disadvantaged) social groups - Number of individuals in training programs for digital/green /transversal/ entrepreneurship skills with special attention to different (disadvantaged) social groups - Share of individuals lacking life skills, and basic/core skills, digital skills, green 		

	environmental skills]	<ul style="list-style-type: none"> - to enable critical thinking and transform current work practices in an environmentally sustainable way - to increase individuals' capabilities and agency - To provide skills necessary in areas of society beyond paid work, including care work, voluntary work, etc. 	<ul style="list-style-type: none"> - - 	skills, transversal skills, entrepreneurship skills		
5. Information systems: Anticipating/forecasting skills needs	Aspects depicted as of mainly economic importance	<ul style="list-style-type: none"> - to provide individuals with information about the skill needs of the economy - to facilitate individuals' choices based on criteria like job availability, wage levels - to satisfy the economies' future demand for skills 	<ul style="list-style-type: none"> - Regular skills forecasting exercises based mostly on employers' assessment - 	<ul style="list-style-type: none"> - Number of skills forecasting exercises undertaken - Vacancy rates - 		
	Aspects depicted as of importance for both economic and social & personal/human development aims	<ul style="list-style-type: none"> - 	<ul style="list-style-type: none"> - 	<ul style="list-style-type: none"> - 		
	Aspects depicted as of importance for	<ul style="list-style-type: none"> - To enable individuals to choose the job one has reasons to value 	<ul style="list-style-type: none"> - Broader skills foresight³⁷ activities taking into account the needs 	<ul style="list-style-type: none"> - Number of skills foresight exercises undertaken 		

³⁷ Skills foresight activities go beyond skills forecasts and “are based on stakeholder and expert assessments of potential future skills scenarios, and identify opportunities for actively influencing trajectories for skill demands via priority setting and vision building, and the actions to fulfil these goals”. They can include quantitative and qualitative data (delphi-style, scenario development, expert discussion) (OECD, 2021).

	social & personal/human development aims	<ul style="list-style-type: none"> - To facilitate individuals' choices incorporating multiple factors beyond wages and job availability, including working conditions, job quality, work-life balance, etc. - To act in a transformative role and support societal attempts for 'just transitions' (overcoming barriers of class, race, gender, wealth) - To overcome challenges as demographic and climate change - to increase agency concerning career choice and actively participate in economy and society - To enable individuals in using her/his skills, knowledge and experience in meaningful way and prevent skills underutilization 	connected to "just transitions"	-		
6. (Career) Guidance and Validation	Aspects depicted as of mainly economic importance	<ul style="list-style-type: none"> - to provide individuals with information about the skill needs of the economy - to facilitate individuals' choices based on criteria like job availability, wage levels - to satisfy the economies' future demand for skills - 	<ul style="list-style-type: none"> - Guidance offers with main goal of labour market integration or reintegration - 	<ul style="list-style-type: none"> - Number of participants in guidance, subsequent employment rates - 		
	Aspects depicted as of importance for both economic and social & personal/human development aims	-	-	-		

	<p>Aspects depicted as of importance for social & personal/human development aims</p>	<ul style="list-style-type: none"> - <i>To enable individuals to choose the job one has reasons to value</i> - <i>To facilitate individuals' choices incorporating multiple factors beyond wages and job availability, including working conditions, job quality, work-life balance, etc.</i> - <i>To act in a transformative role and support societal attempts for 'just transitions' (overcoming barriers of class, race, gender, wealth)</i> - <i>To overcome challenges as demographic and climate change</i> - <i>to increase agency concerning career choice and actively participate in economy and society</i> - <i>To enable individuals in using her/his skills, knowledge and experience in meaningful way and prevent skills underutilization</i> - 	<ul style="list-style-type: none"> - <i>Independent guidance offers with broader focus for personal/human development, job changes, etc.; labour market integration only one of manifold goals</i> - 	<ul style="list-style-type: none"> - <i>Number of participants in guidance from specific (disadvantaged) social groups</i> - <i>Satisfaction of participants</i> - <i>Subsequent job-quality of participants</i> 		
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Issue areas of analytical framework as represented in OECD and EU frameworks

Table 9 Issue areas according to OECD and EU frameworks

OECD Skills Strategy Framework	European Skills Agenda	S2C – WP2 Analytical Framework Issue Areas
Promoting co-ordination, co-operation and collaboration across the whole of government	Join forces in a collective action Action 1: A Pact for Skills	Stakeholder/social partner involvement in skills policies
Engaging with stakeholders throughout the policy cycle		
Developing relevant skills over the life course Using skills effectively in work and society Aligning and co-ordinating financing arrangements	Action 4: Proposal for a Council Recommendation on vocational education and training (VET) Action 5: Rolling out the European Universities Initiative and upskilling scientists Action 9: Initiative on individual learning accounts Action 10: A European approach to micro-credentials Action 7: Increasing STEM graduates and fostering entrepreneurial and transversal skills	Vocational education and training General and higher (academic) education
	Action 7: Increasing STEM graduates and fostering entrepreneurial and transversal skills Action 8: Skills for life Action 6: Skills to support the twin transitions	Skills for life & skills to cope with structural transitions (basic skills, green skills, digital skills, transversal skills, entrepreneurship skills)

Building integrated information systems	Action 2: Strengthening skills intelligence Action 3: EU support for strategic national upskilling action Action 11: New Europass platform Action 12: Improving the enabling framework to unlock Member States' and private investments in skills	Skills information systems: Anticipating/forecasting skills & providing (career) guidance
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Annex II – Expert interviews

Austria

List of expert interviews

AT 01 – Independent expert involved in strategic policy documents

AT02 – Expert at waff (Vienna Employment Promotion Fund)

Bulgaria

List of expert interviews

BG01 Expert public administration

BG02 Expert public administration

BG03 Expert employers' organization

BG04 Expert public administration

BG05 Expert public administration

BG06 Expert public administration

Norway

List of expert interviews

Norway #1 – Interview with two representatives from the Ministry of Education and Research, December 11th 2023.

Norway #2 – Interview with a representative from LO, the Norwegian Confederation of Trade Unions, December 15th 2023.

Norway #3 – Interview with a representative from KS, the Norwegian Association of Local and Regional Authorities, January 9th 2024.

Norway #4 – Interview with a representative from NHO, the Confederation of Norwegian Enterprise, January 19th 2024.

England (UK)

List of expert interviews

Forthcoming

Germany

List of expert interviews

Forthcoming

Italy

List of expert interviews

IT#1 – Interview with Andrea Gavosto from Fondazione Agnelli, 13.02.2024

IT #2 – Interview with Carlo Mariani from INDIRE (National Institute for Documentation, Innovation and Educational Research), 22.02.2024

This paper is a deliverable from the work package two on skills policies, led by 3s Unternehmensberatung GmbH in Vienna.

This working paper represents the views of the authors based on the available research. It is not intended to represent the views of all Skills2Capabilities affiliates.

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