

Skills2Capabilities

Working Paper

Version date: 23.12.2024

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ABSTRACT

Education and skills are central for both economic performance and societal well-being, and for tackling overarching challenges as the twin digital and green transition. To realise this potential, an increasing share of countries have used strategic policy documents in the area of skills policy, colloquially called „skills strategies“. However, despite this importance, systematic approaches for analysing strategic policy documents and their implementation across countries are missing. In this report, we analyse specific skills policy instruments that have been implemented within the framework of strategic policy documents in 5 countries: Austria, Bulgaria, England (UK), Germany and Norway. We observe these instruments' relevance, coherence with other instruments, effectiveness in reaching their goals, efficiency and sustainability. Thereby, we aim to show how individual policy instruments can benefit from being implemented as part of an overarching strategic policy document. The results of the case studies will feed into the comparative report D2.3.

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’

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ACKNOWLEDGEMENTS

Work Package 2 is coordinated by 3s. For Task 2.2, the case studies were written by the partner organisations in the respective countries: 3s (Austria), IPS-BAS (Bulgaria), Fafo (Norway), BIBB (Germany), and IER (England).

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Introduction

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, despite this prominence, systematic approaches for comparing strategic policy documents¹ and their implementation across countries are still missing.

In Work Package 2 of the Skills2Capabilities project, we attempt to fill this research gap. Using the terms of Hall (1993), strategic policy documents often not only set “the overarching goals that guide policy in a particular field” (e.g. adapting the labour force to technological change), but also propose a series of “specific techniques or policy instruments used to attain those goals”. *In this report D2.2, we observe a selection of such policy instruments that have been implemented within the framework of strategic policy documents in detail.* Report D2.2 therefore aims to complement the case studies of strategic policy documents delivered in the previous Report D2.1. In Austria, Bulgaria, England (UK), Germany and Norway (all observed in Report D2.1), we analyse two policy instruments per country that have been implemented within the framework of strategic policy documents. More specifically, we observe these instruments’ relevance, coherence with other instruments, effectiveness in reaching their goals, efficiency and sustainability. Thereby, we aim to show how individual policy instruments can benefit from being implemented as part of an overarching strategic policy document. These insights will then be used as a basis for comparison in the Comparative Report D2.3, which aims to

¹ 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).

identify the main benefits of using strategic policy documents, as well as frequent barriers and central success factors for implementation.

Approach of the case studies

The case studies in this report aim to complement the material of Report D2.1. Report D2.1 includes five country case studies summarizing the overall design and implementation of skills strategies. D2.1 observes how strategies and their goals developed in a given country over time, the balance between economic and/or social & personal development goals of the strategies, the inclusion of specific actions and indicators for implementation and the extent to which implementation has been carried out. This report D2.2 extends the analysis of the implementation of the strategic policy documents by assessing two specific policy instruments per country implemented in the framework of strategic policy documents.

For the selection of the policy instruments, the following criteria have been applied. A policy instrument was defined as a “concrete policy intervention with a plan, a budget, a start, and an end date” (Cedefop, 2015). Selected instruments were all implemented or further developed as part of the strategic policy documents observed in D2.1. The study focuses on larger instruments in terms of their budget and beneficiaries, thereby acting as paradigmatic examples of the larger set of measures foreseen by the overall strategic policy documents. Furthermore, priority was given to policy instruments that had already been subject to evaluations, therefore enabling country research teams to build upon already existing knowledge.

Table 1 Instrument selection

| Country | Observed instruments (D2.2) | Short summary | Associated strategic policy document (D2.1) |
|--------------|--|---|--|
| Austria | Level Up – Adult Education (2011-) | Publicly funded literacy and basic skills courses | LLL:2020 (AT1) |
| | Vienna Weeks for lifelong guidance and further education (2015-) | Large-scale educational outreach events | Qualification Plan Vienna 2020 (AT2) |
| Bulgaria | Career Start Programme (2002-) | Combination of on-the-job training and subsidized employment | National Skill Strategy for LLL 14-20 (BG2) |
| | Adult literacy – New chance for success (2011-2020) | Organized literacy trainings and structured qualification courses for teachers of over-16s | National Skill Strategy for LLL 08-13 (BG1) National Skill Strategy for LLL 14-20 (BG2) |
| England (UK) | Co-investment in skills (2010-) | New co-funding rules for training, reducing public contributions and relying on co-funding by individuals and employers | Skills for Sustainable Growth (UK2) |

| | | | |
|---------|---|---|---|
| | Train to Gain (2006-2010) | Advise for employers on identifying training needs and offers by a skills brokerage service, and full public funding for training costs of low-skilled adults | Leitch Implementation Plan (UK1) |
| Germany | ValiKom (2015-) | Piloting of validation process that recognizes and certifies informally acquired professional skills | National Skills Strategy (DE3) |
| | Bildungsprämie (2008-2021) | Provided public cofinancing for job-related continuing education via a premium voucher and a savings scheme | Advancement through Education (DE2) National Skills Strategy (DE3) |
| Norway | Tripartite industrial programmes for skills development (2019-) | Mandatory free career guidance for newly arrived refugees | Norwegian Strategy for Skills Policy (NO2) |
| | Career guidance as a duty and as a right for refugees (2021-) | National level funding for vocationally oriented skills development within selected industries, with substantial social partner involvement | Norwegian Strategy for Skills Policy (NO2) |

For each of the selected instruments, country research teams drafted a short case study (1000-1500 words). Country researchers observed the context and main design features of the instrument, including

- which of the analysed strategic policy documents (see D2.1) the instrument was part of, the time of the instruments' introduction and discontinuation (if applicable), its legal basis, the government under which it has been created, the leading stakeholders (e.g. ministries, agencies) responsible for the instrument
- the instrument's main rationale, why it was introduced and which problem it was supposed to tackle
- the instrument's main aim, whether this aim can be considered mainly an economic aim and/or a social and human/personal development aim, its target group, educational sector, scale (budget, number of beneficiaries), funding sources, level of implementation (regional, national), monitoring and evaluation practices

Furthermore, in case the respective data had been openly available (e.g. in previous evaluations), or where the data had been accessible via expert interviews, the instrument's success was summarized, including

- The instrument's relevance, i.e. the extent to which the instrument responds to beneficiaries & country needs; as well as policies and priorities highlighted under the strategic policy documents selected & analysed in D 2.1
- The compatibility/complementarity (or lack thereof) of the instrument with other instruments/arrangements/institutions in a country,

including other instruments of the analysed strategic policy documents

- The instrument's effectiveness, i.e. the extent to which the instrument achieved its objectives; to which extent these objectives followed economic goals vs social and human/personal development objectives
- The instrument's efficiency, i.e. the extent to which the instrument delivered results in a cost-effective manner, considering proportionality of actual costs to short-term and long-term benefits
- The added value of being implemented/further developed within the framework of a strategic policy document: Does the instrument produce results beyond what would have been achieved without the higher-level strategic policy document? In other words, what is gained by embedding the instrument in the strategic policy document? Would the instrument have been implemented also without the strategic policy document; did it already exist before/in parallel to the strategic policy documents' inception?
- The instrument's sustainability, i.e. the extent to which the benefits of the instrument continue, or are likely to continue
- The broader impacts of the instrument on a system-level

Methodologically, the case studies rely on desk research, most importantly an analysis of primary documents (evaluation and monitoring reports), existing academic literature on the topic, and available information on the respective online presence of the responsible national authorities.

Case Studies

Austria

Level Up- Adult Education (2011-present)

Authors: Eva Steinheimer

Context & description of the instrument

"Level Up – Adult Education" (formerly known as the Initiative for Adult Education, I:AE, until 2023) offers two types of educational programmes: literacy and basic skills courses, and preparatory courses for obtaining a school-leaving certificate (compulsory schooling, ISCED 02). Launched in 2012, it emerged from a negotiation process involving the Federal Ministry of Education, the nine Austrian Länder, and experts in adult education (*Bund-Länder-Kommission Neue Fördermodelle in der Erwachsenenbildung*). The initiative was included in the 2008 government programme (a coalition of Social Democrats and Conservatives) and its development coincided with the final stages of preparing the LLL:2020 strategy, sharing common stakeholders and a similar vision. The LLL:2020 strategy, published in 2011, coincided with the release of the first programme planning document for the I:AE, followed by the adoption of a legal agreement (§15a Vereinbarung) between the federal and Länder governments in 2012 to regulate the initiative (Chisholm, Lassnigg, Lehner, Lenz and Tippelt, 2009; Federal Law, 2012; Länder-Bund-ExpertInnengruppe „Initiative Erwachsenenbildung“, 2011; Wieser and Dér, 2011). Promoting basic skills for adults is a central goal of the LLL:2020 strategy, which explicitly calls for the creation and implementation of a co-funding instrument between the federal and regional levels.

The issue of adult basic skills deficiencies, and strategies to address them, became a key topic in national and international policy discussions during the 2000s, exemplified by UNESCO's declaration of the Literacy Decade in 2003.² In Austria, the first PISA results in 2000 further spurred this debate. Adult Basic Education gained prominence, leading to the launch of several development projects, primarily funded by the European Social Fund (ESF), which had recently become available through the Ministry of Education (ENLIVEN Case Study). The expert commission behind the I:AE estimated that between 300,000 and 600,000 adults in Austria lacked the basic skills necessary for employment and everyday life. Additionally, around 280,000 individuals aged 15 to 64 were without a compulsory school-leaving certificate, and approximately 5,000 young people each year completed compulsory

² In recent years, the initiative has been aligned with international policy frameworks, such as the UN Agenda 2030 for Sustainable Development and the European Year of Skills.

schooling without obtaining this qualification (Länder-Bund-ExpertInnengruppe „Initiative Erwachsenenbildung“, 2011). The PIAAC results from 2011/12 reinforced these estimates, suggesting that around one million people in Austria lacked basic reading skills. While opportunities for Adult Basic Education had expanded in recent years, they remained insufficient to meet the identified demand, and access was uneven across regions. Preparation courses for obtaining school-leaving certificates were more readily available, but they were offered outside the formal education system as non-formal training, often at the individual's expense. Most Länder provided co-funding schemes, though the level and conditions of support varied widely.

The legal agreement between the federal government and the Länder must be periodically renewed, creating moments of uncertainty and opportunities for the initiative to become a "bargaining chip" in budget negotiations between the federal and regional levels, despite widespread recognition of its necessity and importance.

The primary goals of the initiative in its latest iteration, "Level Up," are to raise individuals' qualification levels to enhance their chances of social participation, integration, and entry into the labour market – reflecting aims of social and human development. At the same time, it seeks to improve employability and address skills shortages, highlighting its economic objectives. Interestingly, the programme planning document³ emphasizes the social goals, while the legal agreement⁴ focuses more on economic aims. This dual focus on both social and economic objectives reflects the involvement of various stakeholders, each with their own agendas, and can be seen as a key factor in the initiative's success.

The initiative's target groups include all residents over the age of 15. For basic skills courses, there are no restrictions based on origin, first language, or prior educational attainment. However, participants in the school-leaving preparatory courses must not have completed education beyond ISCED 02 level. Since the initiative's inception, there have been four funding periods and one interim period: 2012-2014, 2015-2017, 2018-2021, the interim period from 2022-2023, and 2024-2028. In 2024, the fourth funding period was

³ „Von Beginn an ist es ein vorrangiges Ziel von Level Up, Personen in Österreich mit niedrigem Bildungsstand bessere Chancen an gesellschaftlicher Teilhabe zu ermöglichen und deren soziale Integration und Zugangschancen zum Arbeitsmarkt und zum österreichischen Bildungssystem zu erhöhen.“ (Level Up - Erwachsenenbildung, 2024, 5).

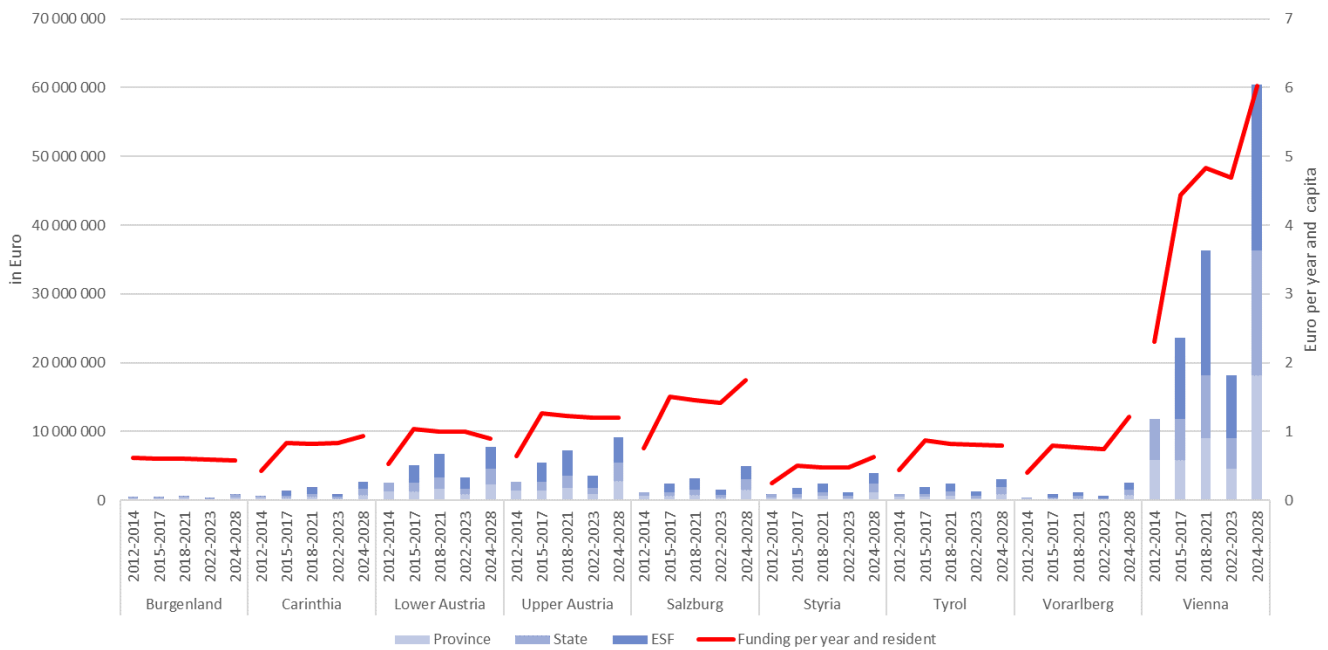
⁴ „[...] die Zielsetzung weiter zu verfolgen, die Beschäftigungsfähigkeit von Personen ohne ausreichende Mindestqualifikation zu verbessern und die Basis zu schaffen, um dem Fachkräftemangel in Österreich gegenzusteuern.“ (Federal Law, 2024)

launched under the new name "Level Up – Adult Education." (Level Up - Erwachsenenbildung, 2024).

All courses offered under the initiative are free of charge for participants, made possible by the 50:50 co-funding agreement between the federal state and the regional governments. Activities were further expanded when ESF co-financing was introduced for basic skills courses during the second funding period, beginning in 2015. ESF co-funding for programmes aimed at acquiring a school-leaving certificate was introduced in 2018.

For the current funding period (2024-2028), a budget of EUR 95.5 million is allocated for basic skills courses, with the largest portion going to the capital region (see Figure 1). The budget for school-leaving certificate courses is set at EUR 77.3 million over the next five years.

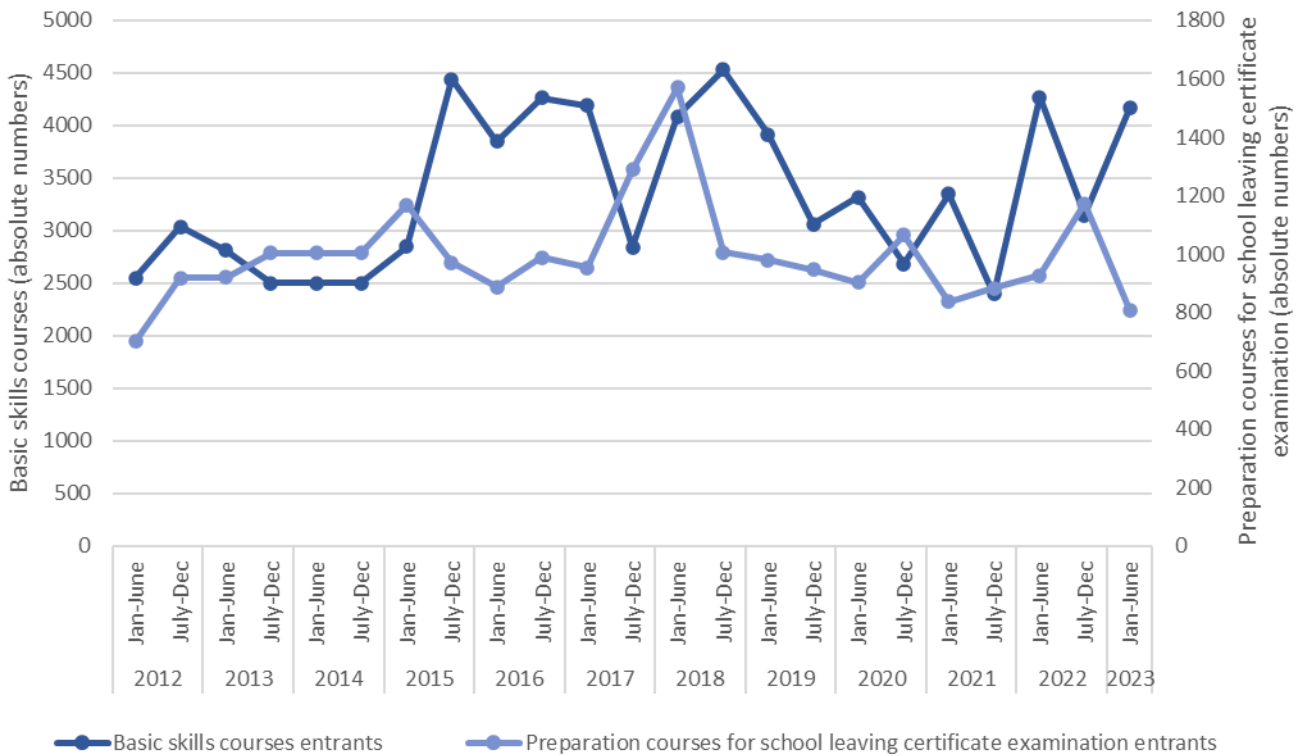
Figure 1 – Budget for Adult Basic Education within the I:AE resp. Level Up from 2012 to 2028 in the Austrian Länder in total and in funding per year and resident



Source: Own calculations based on the legal agreements (15a Vereinbarungen)

Participation is continuously monitored, with participant numbers shown in Figure 2. Between 2018 and 2022, approximately 16,000 individuals (65% female) took part in basic skills courses, while 7,300 (59% male) participated in school-leaving certificate courses. Over half of the participants were aged 25 or older, and around 90% were migrants (Steiner, Pessl-Falkensteiner, Köpping, Juen and Spoljaric, 2023). Each funding period has undergone evaluation (Steiner et al., 2023; Steiner, Pessl, Kuschej, Egger-Steiner and Metzler, 2017; Stoppacher, Edler and Reinbacher-Fahrner, 2014).

Figure 2 – Entrants to I:AE/Level Up courses from 2012 to June 2023, absolute numbers



Source: Monitoring reports 2012-2023

Assessment

The initiative has remained highly **relevant** in addressing the basic skills needs among adults, as described above, and in promoting upskilling of individuals with low educational attainment. The I:AE is closely aligned with the goals of the LLL:2020 strategy and is cited as a key measure to not only enhance individual qualifications but also to strengthen the conditions for participation in all aspects of life. While employability has always been a central objective, the role of basic skills in addressing skills gaps has gained increasing prominence in justifying the initiative, particularly in response to shifts in the labour market.

In terms of **coherence**, the I:AE complements other basic skills training, such as offers by the PES, and serves as an essential component of second-chance education, helping adults progress toward vocational qualifications or higher education entrance certificates. However, there is a tension between the I:AE's offerings and the provision of German language education for newly arrived migrants, which falls under the Ministry of Internal Affairs. During periods of high demand for German courses, the I:AE has acted as a "safety net," diverting resources away from other target groups, such as individuals with Austrian schooling who require adult basic education.

Effectiveness: Qualitative evidence from the evaluations indicates that dropout rates were moderate, with individuals having higher needs tending to stay enrolled longer, although there was significant variation across providers. Participants expressed high levels of satisfaction with the courses, and many, particularly those in school-leaving certificate programmes, planned to pursue further learning or training. All participant groups reported improvements in literacy and digital skills, as well as enhanced self-perception of personal development.

The participation targets outlined in the programme planning document were consistently met, as demand for the courses remained high. However, relative to the estimated population in need of learning opportunities, the I:AE addresses only a small portion. The evaluation recommends expanding the scope of the programme to better meet the broader demand (Steiner et al., 2023, 18).

Efficiency: Quantitative data on the cost-effectiveness of the instrument is not available. However, the qualitative results mentioned above support the instrument's benefits in terms of social integration and personal development.

Added Value: The I:AE and the LLL:2020 strategy were developed concurrently, involving similar stakeholders and sharing a common vision of adult (basic) education as a means for personal development, social integration, and empowerment on top of economic and labour market effects. Launched simultaneously, the I:AE quickly emerged as a flagship initiative within the LLL:2020 strategy, with consistent progress reported. Even beyond the strategy's end date, the I:AE continues to be frequently referenced in the same context. It could be argued that both the strategic process and the instrument mutually benefited from each other, rather than one serving as the sole initiator. It is important to note that the goals and measures outlined in the LLL:2020 strategy were not tied to additional funding. Measures and instruments that were already of interest to the responsible resorts and therefore allocated budgets thrived, while other initiatives faded out unresolved.

The social partners were actively involved in the consultation processes for both the strategy and the instrument, even publishing their own joint concept paper during this period (Österreichische Sozialpartner, 2007). Later, social partner representatives were included in the bodies overseeing implementation, including the I:Ae, where they played an advisory role. This ensured their perspectives were considered, and in a small country like Austria, the same experts often serve across multiple parallel processes, facilitating smooth knowledge transfer and coherence in policy measures.

Sustainability: Stakeholders are united in their belief in the necessity of the I:AE. The extension of the programme from 2024 to 2028, following a two-year period without a new legal agreement during which providers operated under interim funding, reinforces the hope that the I:AE will become a permanent fixture. However, it still carries a lingering sense of uncertainty.

Conclusion

The Initiative for Adult Education marked a significant advancement in the development of the Austrian adult learning system by introducing a supply-side funding element for adult (basic) education, an area that was previously fragmented and underdeveloped. The initiative created equal learning opportunities across all Länder. It also established joint quality standards and provided impetus for the professionalization of educators in the field (Hefler, Steinheimer and Wulz, 2018).

Despite the strengths of the initiative, its major drawback is its non-permanent nature, requiring regular renewal of the agreement, which creates uncertainty between funding periods. While the 15a agreement is a technical workaround, it only partially overcomes the central government's limited legal authority over adult education. Combined with insufficient funding in the nine Länder, the initiative still struggles to reach a large portion of its overall target group (Hefler and Steinheimer, 2020).

The instrument has also been criticised for not including preparation for the “Berufsreifeprüfung,” the acquisition of a higher education entrance certificate for holders of a VET certificate (Lehrabschluss). This educational strand was included in the planning commission's proposal but was rejected due to budget constraints. Accessibility of courses and co-funding opportunities still vary across the Länder.

The instrument serves as a strong example of how the LLL:2020 Strategy balances economic and social goals, reflecting these priorities while securing broad support among stakeholders.

Vienna Weeks for lifelong guidance and further education (2015-present)

Authors: Eva Steinheimer, Günter Hefler

Context & description of the instrument

The "Vienna Weeks for Lifelong Guidance and Further Education" (German: *Wiener Wochen für Beruf und Weiterbildung*; referred to as "Vienna Weeks" hereafter) is a large-scale project framework promoting educational outreach in the City of Vienna, one of Austria's nine Länder. It was introduced in 2015, held annually, and is set to continue in its current form until 2024 and up for further development thereafter. The framework is coordinated by the Vienna Employment Promotion fund, a semi-autonomous public agency⁵, founded in 1995 and holding a centre position within the field of (supply-side) employment and lifelong learning policies in Vienna.

The Vienna Weeks were developed based on several objectives outlined in the Vienna Qualification Plan (waff (Wiener ArbeitnehmerInnen Förderungsfonds), 2013), particularly in the section on "Information and Motivation." Although the framework was not initially referred to as "Vienna Weeks" in the strategic document, it did emphasise the creation of concepts aimed at reaching and informing more low-qualified individuals, as well as efforts to strengthen cooperation between Vienna's districts and incorporate local initiatives—key features of the Vienna Weeks. The document also specifically proposed a large-scale outreach event modelled after the "Adult Learners' Weeks."⁶

The rationale behind developing such an initiative was that it was not enough to simply facilitate access to, and funding for, upskilling and career development for the target groups identified in the Qualification Plan. It was equally important to inform people of their opportunities and reach out to those facing specific barriers to education and training. Negative learning experiences, unfavourable working conditions, a lack of immediately recognisable benefits, and insufficient information about available support were common reasons why many individuals did not pursue further education. It was seen as essential to raise awareness and interest in

⁵ "[A (semi-)autonomous agency] is functionally disaggregated from the core of its ministry or department of state; enjoys some degree of autonomy which is not enjoyed by the core, Ministry; is nevertheless linked to the ministry/department of state in ways; which are close enough to permit ministers/secretaries of state to alter the budgets and main operational goals of the organization; is therefore not statutorily fully independent of its ministry/department of state; is not a commercial corporation" (Pollitt 2004, 10).

⁶ This event is still running, now under the name "Lifelong Learning Week". <https://festivaloflearning.org.uk/get-involved/lifelong-learning-week/>

upskilling among those with only a compulsory school qualification, highlight the personal benefits of education, and bring support services closer to the target audience. To achieve this, better integration of existing cooperation and communication methods was needed, along with the development of new communication channels.

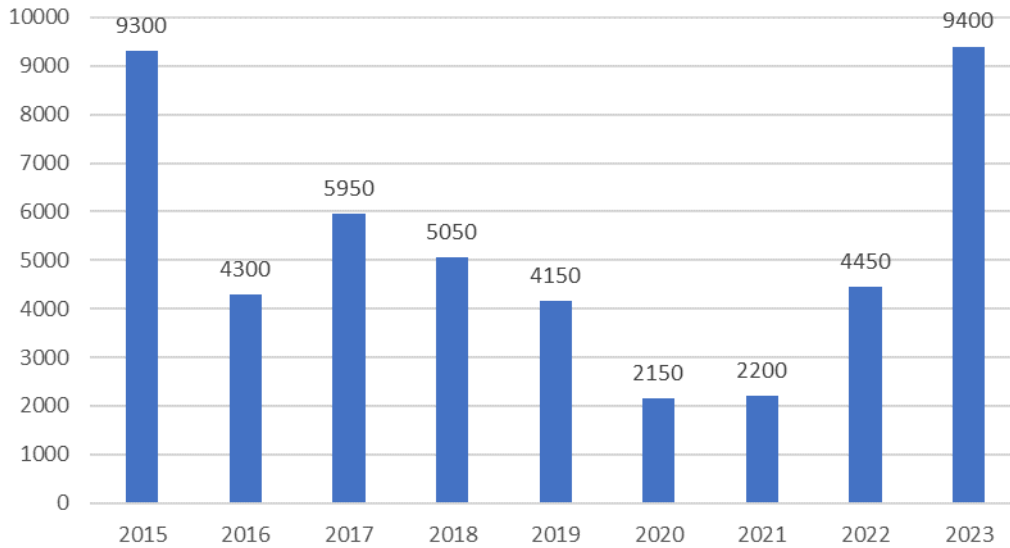
The Vienna Weeks are a concrete initiative designed as an instrument to implement the objectives of the Vienna Qualification Plan 2020. At the core of these objectives is the upskilling of low-qualified adults to improve their position in the labour market and address the increasing demand for skills. All of the outlined aims and measures focus on career development and the greater use of education and training, while also contributing to the personal development of the targeted individuals.

The framework targets two main groups: adults with low levels of formal qualifications or qualifications not recognised in the Austrian labour market, and young adults in transition, at risk of leaving education early, or seeking a way back into education.

Each year, the "Vienna Weeks" organise around one hundred outreach activities, concentrated in a few weeks in spring and autumn. These range from small-scale events with a handful of attendees to larger gatherings attracting hundreds of visitors. The initiatives are implemented by a wide network of organisations, including schools, further education providers, youth centres, community centres, health organisations, migrant and refugee support groups, women's advocacy organisations, and others. The aim is to connect vulnerable groups to the extensive network of guidance, counselling, and educational opportunities available in Vienna.

Most years saw between 4,000 and 5,000 visitors attend the events. Variations in the number of events, invitation policies, participating districts, and focal themes over the years accounted for higher attendance figures in 2015 and 2023. During the COVID-19 pandemic, the Vienna Weeks continued with a mix of different event formats, including many online activities, though fewer people were reached.

Figure 3 – Participants of the events during the Vienna Weeks, 2015 bis 2023



Source: (Steinheimer and Hefler, 2024)

Funding for the framework, including the organisational support for the network partners, marketing activities, programme coordination, and ongoing monitoring was jointly secured by the European Social Fund and the waff's own resources, sourced from the City of Vienna from 2015 to 2022. Since 2023, the waff has been solely responsible for funding the framework. Beyond this, the organisations responsible for specific activities contribute their own resources. For larger events, such as education fairs, the framework may help cover costs like venue hire and security. Additionally, an important contribution to marketing costs comes from participating districts, which distribute information materials to a large proportion of households. The annual budget allocated to the framework was approximately EUR 600,000, with 50% co-funding from the ESF.

From 2015 to 2023, annual monitoring was conducted, collecting both quantitative data on events and visitors, and qualitative data through on-site interviews and follow-up interviews six months after the events. This comprehensive monitoring has ensured that the Vienna Weeks are well-documented, and evidence on the interests, motivations, and plans of participants has been used to continuously refine and improve the framework over the years.

Assessment

The aims of the Vienna Weeks remain highly **relevant** and continue to be a key measure in the updated Vienna Qualification Plan 2030 (waff (Wiener ArbeitnehmerInnen Förderungsfonds), 2024; waff (Wiener ArbeitnehmerInnen Förderungsfonds), 2018). The framework and its events stand out not only as

the largest outreach initiative of its kind in Austria, but also as unique within the EU, due to the framework's complexity, well-established networks, and longstanding tradition.

A success factor of the Vienna Weeks framework is its **coherence** with other regional and local activities of the waff and the participating partner organisations. From the beginning, the Vienna weeks have leveraged existing networks, not only among relevant players in the field of education and labour market policies, but also through close cooperation and coordination of activities between waff and Vienna's 23 districts. The participating districts play a crucial role by sending postal invitations to residents in the targeted age group, making them the primary source of information for the majority of visitors (Steinheimer, Hefler, Prielinger, Weiss and Duric, 2022). For the partner organisations the Vienna Weeks provide a platform to reach a broader audience and an opportunity to experiment with innovative formats for their events.

Effectiveness: Monitoring of the Vienna Weeks over the years shows that the target groups have consistently been reached to a high degree. In 2023, 40% of visitors aged 19 to 65 were low-skilled adults, holding qualifications at most at ISCED 02 level, compared to just 22% of residents in the participating districts of Vienna (Steinheimer et al., 2024). Surveys conducted at the events—ranging from small workshops with only a few participants to open days and large information fairs—indicated that the majority of visitors gained new information and felt their questions were adequately addressed. Partner organisations also provided largely positive feedback, with key organisations participating every year and many returning regularly.

Efficiency: Feedback collected from participants three to six months after their involvement suggests that these outreach activities are largely effective in achieving their intended goals. The impact of the Vienna Weeks should be considered in the context of what short-term interventions in proactive lifelong guidance can realistically achieve. These include broadening individuals' resources for managing career development and decision-making, fostering latent interest in education and training, overcoming smaller barriers, and enhancing the quality of decisions. Attending an outreach event, like those offered during the Vienna Weeks, can be seen as one of many impulses leading to new steps in an individual's educational and career journey (Hefler, Nindl and Wulz, 2016). Interviews conducted with visitors six months after the events reveal that 70 to 80% across all age groups took action—whether by seeking career counselling, starting a learning activity, or applying for a new job (Steinheimer et al., 2024).

Quantitative data on cost-effectiveness are not available.

Added value: One of the key strengths of the Vienna Qualification Plan 2020 is its emphasis on 'Information and Motivation' as one of three major action lines, recognising the critical role of information and guidance alongside upskilling provision and support. The Vienna Weeks framework was explicitly mentioned as a tool to consolidate pre-existing activities, such as recurring large outreach events and stakeholder cooperation. The framework's swift emergence was made possible by this prior groundwork. By being incorporated into the strategic document, long-term commitment from partners was secured, leveraging the specific policy landscape at that time (see Case study). Conversely, the concrete concept of the framework and its rapid implementation significantly contributed to the success of the Qualification Plan.

Sustainability: The Vienna Weeks have established themselves as a permanent feature of educational outreach in Vienna, successfully attracting visitors and reaching the target groups despite changing circumstances, such as economic and labour market shifts, and even during the pandemic. The transition of funding from ESF co-financing to sole responsibility by the waff marks a significant step towards the initiative's permanence. In 2023 and 2024, both the number of events and the duration of the 'activity weeks' were significantly increased. From 2025 onwards, changes in the organisation and delivery format are planned, along with a rebranding to the 'Future Fit Festival', which will feature more than 200 events. These will focus on future opportunities in key professional fields, including STEM, health and social care, as well as climate, sustainability, and decarbonisation (waff (Wiener ArbeitnehmerInnen Förderungsfonds), 2024).

Conclusion

In its regional context, the framework has become a key point of reference for many organisations strengthening networking and cooperation. While other Länder recognise the benefits of this concept, its specific design is tailored to an urban setting like Vienna.

The Vienna Weeks provide valuable lessons: large-scale educational outreach activities that attract significant numbers of participants require strong coordination, collaboration, and resources. Key strengths of the framework include its reliance on existing networks, the integration with other activities carried out by partner organisations outside the framework, the active involvement of district administrations in promoting the events through personal mail invitations, the close connection between participating organisations and their target groups or clients, and the strategic choice of event locations within the visitors' social environment.

One of the limitations observed over the years was finding the right balance between offering enough events without overwhelming the audience. To avoid oversaturation, participating districts rotated most years, as additional events did not always attract a larger audience and could create competition. However, maintaining continuity and regularity in hosting events helped build trust and strengthened the "brand" among potential visitors. Smaller partner organisations, however, reported challenges in terms of flexibility and staffing resources, especially when events attracted fewer attendees than anticipated.

The priorities outlined in the Vienna Qualification Plan 2020 are well reflected in the "Information and Motivation" section, which highlights networking and guidance activities closely linked to the Vienna Weeks. The Vienna Weeks are identified as a key instrument for informing low-skilled adults in Vienna about their career and learning options, while reducing the barriers these individuals face in taking action. Although these are clearly personal development goals, they also contribute to the overarching objectives of the strategy, namely improving employability and increasing the supply of skills in the labour market. The strategic goals and the Vienna Weeks initiative are interlocked, supporting both economic and human development aims. However, the focus on outreach to hard-to-reach target groups, the event-based setting, and the involvement of organisations working on broader social issues (such as youth centres, social work, migrant organisations, and liberal adult education providers) reflect a holistic approach. This extends beyond purely labour market-related topics, offering guidance and orientation in a wider social context.

Bulgaria

Programme “Career Start” (2002-present)

Authors: Veneta Krasteva, Svetlana Alexandrova, Pepka Boyadjieva, Petya Ilieva-Trichkova

Context & description of the instrument

The “Career Start” programme has been running continuously since 2002. It has been included in the National Employment Action Plans (NEAP) throughout these years as part of Bulgaria’s Active Labour Market Policy (ALMP) under the management of the Ministry of Labour and Social Policy (MLSP).

Since 2013/2014, the problem of graduate realization and discrepancies between their acquired education and work has sharply emerged. As a consequence, “Career Start” was included in the Action Plans of the Strategy for lifelong learning (LLL) 2014–2020.

The Employment Agency (an executive agency under the MLSP) has the leading role in implementing the programme. The Ministry of Education and Science (MES) also contributes to its realization.

The programme was introduced in order to facilitate young people’s transitions from school to the work and to support young graduates’ acquisition of work experience.

The labour market situation among graduates was defined as a serious problem in the second LLL Strategy 2014–2020, though the first LLL Strategy did not identify graduate employability as a problem — as researchers have pointed out, it did not mention this term at all (Boyadjieva et al., 2020: 112). As noted in the National Strategy for lifelong learning (NSLLL 2014–2020), for the period 2008–2012, employment among young people aged 20 to 34 who had recently completed (1 to 3 years prior to the reference year) higher or secondary education declined by 12.3%— from 79.6% in 2008 to 67.3% in 2012; this level is considerably lower than the EU-27 average for that year (75.7%) (NSLLL 2014–2020: 11).

The “Career Start” programme is included in the NSLLL 2014–2020 as part of Impact Area 5: “Increasing the attractiveness and improving the quality of vocational education and training to ensure employment and competitiveness”. It is one of the tasks of the Annual Action Plans for the Strategy 2014–2020, under the activity “Development and implementation of policies and measures for the development of professional training in a working environment, incl. by organizing internships in enterprises during and after graduation”. It also relates to one of the activities in the NSLLL 2014–2020 under Impact Area 6: Modernizing higher education, namely, “Establish active policies for the labour market which encourage employment of recent higher education graduates” (NSLLL 2014–2020: 32).

The main aim of the programme is to provide opportunities for gaining work experience among unemployed youth who have completed higher education, in order to facilitate their transition from education to employment. It is a combination of on-the-job training and direct job creation.

The immediate goals of the programme are described on the website of the Employment Agency as follows:⁷

⁷ Employment Agency, “Career Start” Programme, available at: <https://www.az.government.bg/pages/programa-start-na-karierata/>.

- Preventing disqualification of young people;
- Protecting against ‘brain drain’;
- Providing opportunities for the renewal of public institutions;
- Providing opportunities for young people’s further recruitment to permanent jobs;
- Achieving a flexible combination of knowledge, skills and experience in line with the requirements of the market economy.

The programme is aimed at a specific target group — young people under 29, without work experience in their speciality/area of completed higher education, who are registered with the Employment offices. The activities of the programme include providing work in the public sector for a period of 9 months if there is a match between the requested jobs and educational profiles (after 2020, the period was extended to 12 months).

The programme is being implemented at national level, but the regional needs of the local labour market are also taken into account (Boyadjieva et al., 2020: 113). It is funded by the national budget. The programme’s scale can be seen in the table below.

Table 2 Number of beneficiaries and budget for the “Career Start” programme

| Year | Total participants | New participants | Budget (EUR) |
|-------------|---------------------------|-------------------------|---------------------|
| 2022 | 1,414 | 692 | 3,534,360 |
| 2021 | 867 | 853 | 3,014,168 |
| 2020 | 692 | 443 | 1,013,058 |
| 2019 | 692 | 692 | 1,663,683 |
| 2018 | 795 | 788 | 1,774,670 |
| 2017 | 1,048 | 884 | 2,175,497 |
| 2016 | 896 | 896 | 1,890,693 |
| 2015 | 1,087 | 1,002 | 2,024,997 |
| 2014 | 1,595 | 114 | 2,554,705 |

Source: Reports on the implementation of the National Employment Action Plans, available at: <https://www.az.government.bg/pages/otchet-za-deinostta-na-az/>.

The organization responsible for carrying out the programme (the Employment Agency) compiles data on indicators in order to create reports and information that are presented to the Minister of Labor and Social Policy at the end of each year. In addition, results from the implementation of the programme are also included in the annual reports on the implementation of the NSLLL 2014–2020. In addition, the programme is part of ex-post assessments of the active

labour market measures included in the National Action Plan for Employment 2015 and the National Action Plan for Employment 2017.

Assessment

As mentioned above, the programme is part of Impact Area 5 of the NSLLL 2014–2020 — referring to ensuring employment for young graduates, which is one of the priorities of the NSLLL 2014–2020. One of the activities in the sphere of higher education defined in the second strategy is to “Establish active policies for the labour market, which encourage employment of recent higher education graduates” (NSLLL 2014–2020: 32). In addition, the programme’s main goal aligns with the European Employment Package and the Europe 2020 initiative “New Skills for New Jobs” (Jeliazkova et al., 2017).

The programme largely focuses on achieving economic goals, as these mainly relate to the labour market. Having professional experience is defined as an important condition for the inclusion of young people in the labour market (National Employment Action Plan 2014). Social aspects are addressed insofar as long-term unemployment, marginalization, and social exclusion can be prevented through realization within the labour market. Personal development is considered a prerequisite for economic growth because the “realization of various opportunities for young people to access the labour market, contributes to the achievement of social cohesion. This, in turn, is a prerequisite for achieving economic growth”.⁸

The “Career Start” programme is well-coordinated with universal labour market policies and, more specifically, youth employment policies. Besides being included in the National Employment Action Plans, it is also in the National Plan for Implementation of the European Youth Guarantee 2014–2020. The design and target group of the programme has a lot in common with another measure, part of the Action Plan for Implementation of the NSLLL 2014–2020 (Jeliazkova et al., 2018: 75). This is the “Youth Employment” programme, which also offers internships to unemployed young people up to 29 years old with higher and secondary education.

The goals of the “Career Start” programme additionally complement the aims of the Strategy for Development of Higher Education in the Republic of Bulgaria for the period 2014–2020, particularly the problem of practical training for students in a real-life working environment, according to this strategic document: “Young professionals lack adequate practicable

⁸ Employment Agency, “Career Start” Programme, available at: <https://www.az.government.bg/pages/programa-start-na-karierata/>.

knowledge, skills and habits” (Strategy for Development of Higher Education 2014–2020: 13). The programme also has much in common with one of the activities included in the Strategy for Higher Education Development: funding student internships and practices during their training through the MES web portal (<http://praktiki.mon.bg/sp>), as well as other similar systems linking higher education, students, and employers and creating further incentives for employers who provide practical training and experience following the completion of education (Strategy for Development of Higher Education 2014–2020: 29).

“Career Start” is defined as one of the most successful programmes in the country, according to both scientific analyses (Jeliazkova, 2017; Boyadjieva et al., 2020) and ex-post assessments (Atanasov, 2017; 2019). Designed to prevent disqualification among young people, it provides an opportunity for them to gain professional experience in a real-life working environment in their specialised area of completed education. The inclusion of young people with modern knowledge in the public sector also contributes to the fulfilment of another goal set by the programme: renewing public institutions.

Studies show that the objectives of the programme are quite relevant and that the development and realisation of the programme is embedded in the regional socio-economic context as well as local labour market needs (Boyadjieva et al., 2020: 113). In addition to facilitating inclusion in the labour market and avoiding the risk of mismatch between one’s work and education, analyses have noted that “involvement in the programme has a broader impact on the lives of young people, due to its positive influence on their self-esteem and job satisfaction” (Boyadjieva et al., 2020: 114).

According to the assessments of the NEAP 2015 and NEAP 2017, “Career Start” has had the highest gross effect⁹ among the national programmes and projects implemented as part of the ALMPs in Bulgaria (Atanasov, 2017; 2019). With reference to net impact,¹⁰ the programme ranks second at 22.2% and 23.1% in 2015 and 2017, respectively. This is because young people with higher education find it relatively easy to find employment after participating in the programme and obtaining an internship (Atanasov, 2019: 84).

⁹ Proportion of unemployed persons (or their relative share) included in a program were able to find work one year after the end of their participation in the program.

¹⁰ Net impact is due solely to the program in place and shows what would have actually happened in the labor market if the program had not been in place. In this way, it is proven that finding a job is precisely due to the participation of unemployed persons in the program.

Since 2015, increased employment of recent graduates (aged 20–34, having completed their education 1 to 3 years prior to the reference year) has been observed (see the table below).

Table 3 Employment rates of recent graduates aged 20–34, ISCED 2011 levels 3–8 (%)

| Year | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|-----------|------|------|-------|------|------|------|------|------|------|------|
| Rate s | 65.4 | 74.6 | 72.00 | 77.7 | 78.6 | 80.7 | 78.7 | 73.8 | 79.0 | 84.2 |

Source: Eurostat, Employment rates of recent graduates, Online data code: tps00053.

In general, during the period of operation of the National Strategy for LLL 2014–2020, a decrease in youth unemployment was observed across all educational groups.

Table 4 Unemployment rates by educational attainment level, ages 25–29 (%)

| ISCE D 2011 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|-------------------|------|------|------|------|------|------|------|------|------|------|
| Level 0–2 | 32.4 | 27.8 | 28.9 | 24.6 | 18.4 | 17.7 | 14.5 | 22.0 | 18.7 | 16.0 |
| Level 3–4 | 13.3 | 9.8 | 8.1 | 7.0 | 5.3 | 4.8 | 5.4 | 7.3 | 5.6 | 5.9 |
| Level 5–8 | 9.8 | 6.9 | 7.0 | 5.4 | 4.1 | 3.7 | 4.9 | 4.3 | 3.6 | : |

Source: Eurostat, Unemployment rates by sex, age and educational attainment level (%), Online data code: lfsa_urgaed.

Evaluations of ALMPs confirm that the higher the education of participants, the higher the effects of their inclusion in such programmes (Atanasov, 2017: 71). Despite the decrease in unemployment among young people, researchers have found that there is also a parallel decreasing trend in the number of employed people aged 15–29 (Beleva, 2021). According to Beleva, this indicates the presence of many unresolved issues regarding the transition from school to work for a large part of Bulgarian youth and the adequacy of their knowledge and skills; the contribution of a programme such as “Career Start” has not changed the employment trends for this age group (Beleva, 2021: 90).

The programme was launched before the elaboration of both National Strategies for LLL and, in practice, it could exist even without the presence of these strategic documents. The inclusion of the programme in the NSLLLs demonstrates one of the ways that Bulgaria's LLL policies are being implemented — namely, the majority of envisaged activities are carried out as part of active labour market policies.

However, the inclusion of the “Career Start” programme in the NSLLL 2014–2020 has increased its visibility and adds additional value to it, affirming the need for a stronger connection between higher education and employers. However, the inclusion of the “Career Start” programme in the NSLLL 2014–2020 increased its visibility and added additional value to it, affirming the need for a stronger connection between higher education and employers. The Program became more visible not only among policy-makers, but also among potential participants and employers. Thus, its visibility among higher education institutions and students increased through its placement at the Ministry of Education and Science's web system (<http://praktiki.mon.bg/sp>) where students were able to search for opportunities for practical training and internships after completing their education. Concurrently, the Employment Agency's territorial divisions conducted information campaigns, supported by regional and municipal administrations, to acquaint people, employers included, with the Program and the opportunities it offers. Information was also shared by state institutions where young people could start an internship.

Although the net effect of “Career Start” is high compared to other ALMP programmes, the main problem some experts have identified is that not all young people were hired after the end of the project (Boyadjieva et al., 2020: 114). Other studies of ALMPs where programme participants have been interviewed also show that once the project ends, youth employment contracts are not renewed. One conclusion from this study is that employers rely on employment subsidies to hire people; therefore, a positive effect is reported only as long as such programmes exist (Krasteva et al., 2018; Sirovátka, et al., 2023).

Another study (Yakova & Politov, 2023) in which interviews and surveys were conducted with representatives of public institutions and beneficiaries of the programme shows that, despite the high impact assessment and positive attitudes of participants, the programme faces problems in regard to the low interest among eligible youth and a drop in the number of potential applicants. The main reasons for this are the low monthly remuneration (close to minimum wage during the different periods), the slow application and selection procedure, and a lack of information about the programme among

graduates seeking work (Ibid.: 10). The results of the cited research show that the programme has high sustainability — both in terms of the duration of its implementation and the potential for it to be continued in the future.

Conclusion

As stated, the “Career Start” programme is considered a successful project among Bulgarian ALMPs. The young people in it gain professional experience in the specialty with which they have graduated; the public administration is renewed with people who have new knowledge; and the transition from education to the labour market is facilitated for certain groups of young people. The researchers cited above and ALMP evaluations have identified the programme as a good practice among labour market measures. This means that it has proven its effectiveness and sustainability in the field of employment and has had positive results on the labour market over a long period of time.

One critique of this programme is that it only targets young people with higher education, i.e., ones that are “easy to activate”, shifting efforts away from more vulnerable groups of low-skilled and uneducated youth (Sirovátka, et al., 2023). It should be borne in mind that, although programmes aimed at persons with low or no education have a low gross effect, the net effect is much more significant because, in many cases, these individuals’ only access to the labour market comes from the programmes included in ALMPs (Atanasov, 2015: 82).

The introduction of the programme follows a policy trend imposed since 2000 to activate and provide support for returning to the labour market (Krasteva, 2019: 108). The activating approach has resulted in a greater share of the costs being used for employment subsidies and less investments made toward training and qualification (Krasteva, 2019: 111–112). This strong focus on employment subsidy initiatives and low funding for training programmes in Bulgaria has been a cause for criticism from the European Commission (European Commission, 2016).

As mentioned above, the “Career Start” programme corresponds to the goals highlighted under the NSLLL 2014–2020, namely, increasing the employability of young graduates and encouraging the employment of recent higher education graduates.

This programme reflects the desire to increase economic growth and meet labour market needs, both of which can be found in lifelong learning policies. It has been deemed successful in this regard, since it gives participants the chance to begin jobs related to their completed education at organizations

that require personnel with such expertise. To the extent that professional realization is an important part of and creates the conditions for personal development, the programme also contributes to the social and personal development goals of the strategic policy document, mainly for its target group.

Programme “Adult literacy — New Chance for Success” (2011-2020)

Authors: Svetlana Alexandrova, Veneta Krasteva, Pepka Boyadjieva, Petya Ilieva-Trichkova

Context & description of the instrument

The Adult Literacy Programme aims to create the conditions needed for continuing education and to overcome the problems associated with the comparatively low level of education among part of the Bulgarian population. It is an example of efforts under the National Strategy for Lifelong Learning (NSLLL) 2008–2013 and NSLLL 2014–2020 to synchronise the attainment of socio-economic objectives and simultaneously contribute to improving social inclusion and economic growth (NSLLL 2014–2020: 4), ensuring an integrated holistic environment for lifelong learning, and increasing participation in its various forms among all groups, including vulnerable ones.

According to Eurostat data, 24% of the population aged 15–64 in 2011 had less than primary, primary, or lower secondary education (levels 0–2), and this share among the unemployed was 32.4%¹¹. Reducing low educational attainment levels is key for the development of a more inclusive, equitable, and resilient society. The Programme targets improved quality of life among population groups with lower education in Bulgaria by offering appropriate opportunities for increasing their literacy, enabling their acquisition of key competences, and facilitating their integration into society and the labour market. A partial analysis of the Programme is available: in the NSLLL Impact Assessments (2008–2013; 2014–2020); in the operational programmes’ evaluation reports; and in two internal evaluations of projects with the Ministry of Education and Science (MES) as beneficiary. Its qualitative impact has been addressed within the framework of the ENLIVEN Horizon 2020 project (2016–2019)¹².

The Adult Literacy Programme is implemented on a national scale, with European (from the European Social Fund (ESF)) and national financing from the MES and in partnership with schools, the Employment Agency (EA), the Ministry of Labour and Social Policy (MLSP), and the State Agency for Refugees at the Council of Ministers.

¹¹ Eurostat, Data code: edat_ifs_9904, Extracted on 23.05.2024.

¹² [Encouraging Lifelong Learning for an Inclusive and Vibrant Europe | ENLIVEN | Project | Fact sheet | H2020 | CORDIS | European Commission \(europa.eu\)](#)

- From 2011 to 2015, the project BG051PO001-4.3.01-0001 “Adult Literacy — New Chance for Success” (50 months) was carried out with a budget of 7,500,000 EUR under the Operational Programme Human Resources Development (OP HRD) (2007–2013), through which organized trainings were offered at primary and lower secondary level (ISCED 1–2) and structured qualification courses for teachers of over-16s with low literacy rates who had completed training in literacy and mastery of modern key competences. The target was for 250 teachers to be engaged in andragogy training, with 16,000 people included in courses (Action Plans for implementation of the NSLLL (2008-2013));
- From 2016 to 2020, the programme BG05M2OP001-3.004 “Adult Literacy — Phase 1” (40 months) was carried out with a budget of 9,745,000 EUR under the Operational Programme “Science and Education for Smart Growth” (OP SESG) (2014–2020). The target was 10,000 over-16s (including Roma) included in literacy courses¹³ and a completion rate of 80% (Action Plan for implementation of the NSLLL (2014-2020), 2016).

In its essence, the tool is meant to support: the collection and usage of data on the literacy needs of adults; opportunities for their realization; the adequate methodological and pedagogical preparation of teachers; mediating support and motivation for people with low literacy levels to take part in trainings; and the development of a system for the recognition and validation of non-formal and informal learning. The vulnerability of beneficiaries, as well as the need for approaches that offer them specific psychological support and social skills development in literacy and vocational training, are addressed. The inclusion of ethnic minorities (Roma) in particular was emphasised during the second period of the Programme.

Assessment

The Programme supports the efforts of both strategies to cope with poverty, social exclusion, and skills shortages; it also responds to the established strategic priorities of consolidating stakeholders' efforts to improve broader access to, and the effectiveness of, lifelong learning among all population groups (NSLLL 2008–2013) and to promote the importance of involvement in

¹³ 600 academic hours for primary education and 360 academic hours for each grade level (5th, 6th, and 7th) of lower-secondary education. Participants are also encouraged through the provision of daily stipends.

education towards the active social inclusion of vulnerable groups (NSLLL 2014–2020).

According to the Impact Assessments, the implementation of the Adult Literacy Programme contributes more specifically to the fulfilment of the Strategy for Educational Integration of Children and Students from Ethnic Minorities (2015–2020), the National Strategy for Promoting and Enhancing Literacy (2014–2020), and the National Strategy of the Republic of Bulgaria for Roma Integration (2012–2020) (Final Evaluation Report, 2023: 280-281).

In 2017, the follow-on operation “Training of adults undergoing literacy courses”¹⁴ was planned within the implementation framework of the NSLLL (2014–2020), whose goal was to help increase the chances for active labour market participation among unemployed people who had successfully completed literacy courses and reached the necessary educational requirements for inclusion in vocational training, with priority given to youth. The measure was carried out by the MLSP and EA, both coordinating their efforts with the MES. The proposed target was for 4,225 people to take part in professional qualification training.

From 2011 to 2015, 16,662 adults were involved in literacy initiatives and 14,145 adults completed literacy programmes. There were 520 andragogy teachers trained, and 30 educational programmes for adults were adapted during this period. Between 2016 and 2020, these results were further enhanced with a comprehensive adult education model, which included the development of a training methodology, the delivery of literacy courses, and the certification of achieved learning outcomes. Over 120 schools across the country participated, training 10,723 people, and a 73.47% share received certification for successfully completing their courses (Internal evaluation of systemic projects with the MES as a specific beneficiary, in progress under the OP SESG, Final Report, 2022: 30-32). In terms of performance, the Programme is considered to have satisfied the efficiency criteria to the extent that, all other things being equal, its intended objective was met or exceeded with fewer resources and an efficiency ratio of 0.41% (Final Evaluation Report, 2023: 115).

From the perspective of social inclusion for vulnerable groups, the opportunities provided by adult literacy measures play an important role in the

¹⁴ The measure was implemented in support of Impact Area 5: “Increasing the attractiveness and improving the quality of vocational education and training to ensure employability and competitiveness” from the NSLLL 2014–2020, in effect providing VET opportunities for both employed and unemployed persons, giving priority to youth, including in-service training according to business needs and the demands of the transition to a sustainable, low-carbon, and green economy. It was financed by the OP HRD (2014–2020) with a budget of 5,000,000 EUR.

empowerment process, especially for learners at the lowest levels of education (Boyadjieva & Ilieva-Trichkova, 2023: 169-191). This is largely a question of changing participants' attitudes towards the value of education, which also contributes to fostering positive attitudes regarding their children's education. Another important factor for learners' better social integration is acquiring the high self-esteem and confidence needed to cope with everyday life challenges, to improve their social contacts, to develop new skills, and to find employment (Yordanova et al., 2018: 25-26).

An additional positive outcome of the Programme has been its indirect impact on the regulatory framework. The amendment of the Pre-school and School Education Act and equivalisation of certificates issued under the Programme with the documents regularly issued by the Ministry of Education and Science have allowed for the validation of competences in the field of general education (Final Evaluation Report, 2023: 282). The Adult Literacy Programme being included in the NSLLL (2008–2013; 2014–2020), as well as the MES' leading role¹⁵ in its implementation, has facilitated the upgrading of the legal framework for legitimising literacy, certifying learning outcomes, and validating non-formal and informal learning.

Though the 2015 (22.2%) and 2021 (20.8%)¹⁶ shares of people with less than primary, primary, and lower secondary education (levels 0–2) decreases, even exceeding the previously set quantitative targets, evaluation of the Programme as part of the implementation of the NSLLL (2014–2020) does indicate some performance issues. They are mainly related to insufficient coordination among the involved institutions, lack of analysis about the achieved results, and no planning for the Programme's extension (Deikova et al., 2021: 47). This qualitative analysis also draws attention to persistent barriers for wider inclusion within the Programme, identifying: dispositional barriers based on age, gender-based limitations, and existing group stereotypes; situational barriers due to a lack of school transport; insufficient time due to family obligations, childcare, or employment constraints; institutional barriers, including changing schools where courses are held; and barriers related to insufficient planning as well as poor synchronisation across the activities of the involved institutions (Yordanova et al., 2018: 22-25).

After the completion of “Adult Literacy — Phase 1” (2016–2020), a new initiative was announced, “Adult Literacy — Phase 2”, with an effective period

¹⁵ The designation of the Ministry of Education and Science as a specific beneficiary establishes the basis for a unified and standardised approach in the development of a toolkit for the certification of learning outcomes and the issuing of documents. (Analysis of the implementation of ongoing projects with the MES as a specific beneficiary, 2017: 141).

¹⁶ Eurostat, Data code: edat_lfs_9904, Extracted on 23.05.2024.

of 26 months starting with a call for proposals on 21.12.2020 and a budget of 8,009,623.48 EUR. The project was updated in line with some of the identified obstacles to broader inclusion among target groups by opening up cooperation with civil society organisations, in a move towards greater regional impact, and its activities are aimed directly at over-16s registered with the Labour Office. Another performance indicator, as a measurement of long-term results according to the ESF Regulation, links the acquisition of basic education within the Programme and continuing education in the first secondary school stage (8th–10th grades), in vocational training, or in employment for up to six months after participation in the intervention (Final Evaluation Report, 2023: 68).

Conclusion

The Adult Literacy Programme reflects the priorities of both strategies to ensure better access and quality of education and training for all learners. It supports the development of an adult literacy system, contributes to the target groups' motivation for further education, and improves their access to the labour market, thus fulfilling one of the main objectives of the NSLLL (2014–2020): to ensure the appropriate conditions for the transition to a functioning lifelong learning system (Final Evaluation Report, 2023: 269). On a systemic level, the Programme makes a valuable contribution towards equity in formal education and training, as well as non-formal and informal learning, by developing and implementing a system for the validation and recognition of previous learning experiences for adult education purposes (Abdul-Hamid et al., 2021: 135).

The Programme has reflected the strategic documents' overall strengths, including efforts to integrate vulnerable groups and combine economic with social objectives, but it has also made clear some of their weaknesses: insufficient coordination between institutions and a lack of efforts for regularly monitoring, analysing, and evaluating the planned actions. Based on the lessons learned from its implementation during both analysed periods, the Programme's public image and that of its results need to be bolstered; better synchronisation is also required among the institutions involved in interventions in order to overcome organisational inconsistencies and institutional obstacles; the identified barriers to target groups' inclusion need to be tackled; and the Adult Literacy Programme should extend its reach (Yordanova et al., 2018: 30-31).

England

Co-investment in skills in England (2010 – present)

Author: Terence Hogarth

Context & description of co-investment

From 2010 onwards governments in the UK have introduced cuts to various public services to reduce the level of government debt. In 2008 (Q1), central government debt stood at 42 per cent of GDP; following the financial crash it stood at 82 per cent in 2012(Q1).¹⁷ Further education and skills, which is largely comprised of vocational education and training, was adversely affected by cuts to public expenditure. Reflecting on budget changes over time, the Institute for Fiscal Studies (IFS) commented: “Across all areas of education spending, further education and skills saw the largest spending cuts in the decade after 2010. This continues a long historical pattern where further education receives the smallest increases when overall spending rises and the largest cuts when governments are looking to reduce spending.” (Drayton, et al. [2023] p.67). To shore up the skills budget, increasing emphasis was placed on co-investment between the state, employers, and learners.

Even before the financial crash and the damage it wrought to government finances, policy makers had sought to increase non-governmental investment in education and skills. In 1998, for example, tuition fees for higher education students were introduced, and the Banks Review (2010) had already made the case for co-investment to optimise investments in skills (Banks, 2010). Co-investment was also a means to make skills provision more demand-led because employers (and learners) would be incentivised to make sure that they obtained a return on investments made with their own money.

Banks’ recommendations were largely adopted in the government’s 2010 policy document *Skills for Sustainable Growth* (BIS, 2010a). It stated: “Investment in training gives real returns. The cost of paying for training should ultimately be shared between employers, individuals and the state to reflect the benefit each receives. As well as being a better way of allocating scarce resource, it means that individuals and business are motivated to ensure that what is provided meets their needs” (p9).

As shown in Table 1 the main change in funding was the introduction of loans from 2013/14 to fund training for those aged over 24 years or over replacing co-

¹⁷ ONS GG Gross consolidated debt as a percentage of GDP (Maastricht ESA 10) – series YEQJ

funding.¹⁸ This was explained as follows in *Further Education – New Horizon: Investing in Skills for Sustainable Growth* (BIS, 2010b): “We will remove grant funding from the 2013/14 academic year, replacing it with Government-backed fee loans for individuals aged 24 or over studying qualifications at Level 3 and above. This will enable learners to access the funds they need to gain intermediate and higher-level skills. It is only fair for those who benefit most from training to make a greater contribution to the costs of their course, but also fair for them to make this contribution when they are indeed realising those benefits and earning a good salary” (p.7).

¹⁸ Co-funding is where the provider receives only part of the full funding from government for delivering a particular course. Each course has a fee set by government. Co-funding is usually set at 50 per cent.

Table 5 Funding entitlements by learning level specified in Skills for Sustainable Growth (2010)

| | Entitlement 2012/13 | | | Entitlement 2013/14 | | |
|----------------------|--|-----------------|---|--|-----------------|--|
| | Priority population groups and Government subsidy for learning they can expect | | | Priority population groups and Government subsidy for learning they can expect | | |
| | Individuals aged 19-24 | Individuals 24+ | Individuals who are unemployed or on active benefits | Individuals aged 19-24 | Individuals 24+ | Individuals who are unemployed or on active benefits |
| Basic Skills | Fully funded | Fully funded | Fully funded | Fully funded | Fully funded | Fully funded |
| Level 2 (first) | Fully funded | Co-funded | Fully funded targeted provision for learners with skills barriers to employment | Fully funded | Co-funded | Fully funded targeted provision for learners with skills barriers to employment aged 23 and under and/or training below level 3. Loans for those aged 24+ on courses at Level 3 and above. |
| Level 2 (retraining) | Co-funded | Co-funded | | Co-funded | Co-funded | |
| Level 3 (first) | Fully funded | Co-funded | | Fully funded | Loans | |
| Level 3 (retraining) | Co-funded | Co-funded | | Co-funded | Loans | |
| Level 4 (any) | Co-funded | Co-funded | | Co-funded | Loans | |

Source: Skills for Sustainable Growth / Note: (1) levels broadly equivalent to ISCED levels.

Assessment

Training loans are available to students studying towards qualifications at level 3 and above (excluding apprenticeships). It is now called an [Advanced Career Loan](#). Its purpose is to pay for tuition fees (a maximum funding level is set by government for all approved courses). The funding is paid directly to the training provider / vocational school and is repaid by the learner once they have completed their course. Repayments are collected through the tax system once the individual's income is above a certain level (£27,295 a year in 2024).¹⁹ In 2013/14 there were 56,220 awards of training loans.²⁰ This had fallen by 35 per cent to stand at 36,300 in 2022/23. In 2022/23 the average amount of loan was around £2,670.²¹

A more significant development was the introduction of co-investment in apprenticeships. In 2017, an apprenticeship levy was introduced levied at 0.5 per cent of an employer's annual pay bill. To fall in scope of the levy, an employer's payroll must be more than £3m (€3.4m). This effectively results in small firms being exempt. Levy payments can be reclaimed by the employer if it takes on an apprentice. The amount reclaimed covers tuition costs, the maximum level (or price) of which is set by government on an apprenticeship-by-apprenticeship basis. The levy's introduction was accompanied by a sharp fall in the number of apprenticeship starts, recovery from which is yet to be achieved. The levy's introduction was associated with an increased share of apprenticeships being accounted for by older apprentices (24 years+) often taking higher level apprenticeships (i.e. at ISCED levels 5+). The reasons underlying the fall in the number of apprenticeship starts is complicated. In part, it is the result of levy-payers choosing to invest in apprenticeships which have a relatively high price attached to them; typically ones at ISCED level 5+. This means that employers' levy contributions support fewer apprentices than in the past (Dickerson and Hogarth, 2024). In 2022/23, the levy raised €3.9bn to fund apprenticeships in England (Tahir, 2023).

The relevance of co-investment, especially in relation to apprenticeships, is in making training demand led. If employers are expected to pay for training, then they will select courses/programmes that deliver economic value. The coherence of co-investment is evident from the way in which it formed part of government's ambition to make the skills system fairer – i.e. beneficiaries

¹⁹ Based on a student on Plan 2

²⁰ Data from: DfE (2017) [Advanced Learner Loans Application information 2016/17 academic year final report](#)

²¹ Data from [Advanced Learner Loans Paid in England Academic Year 2022/23](#)

should bear their share of the costs. It also provides additional tax revenues. Its effectiveness is open to question. Training loans have been used by a small percentage of learners and the levy is associated with a fall in the number of apprentices. That said, it may well have realigned provision in favour of relatively high return apprenticeships. There is no evidence on efficiency. The strategic importance of Skills for Sustainable Growth is its initiation of a marked shift to co-investment. That training loans and the levy are still in existence today reveals their sustainability.

Conclusion

Co-investment has economic (increasing non-governmental investment in skills and making the adult skills system more demand-led) and social goals (more equitably sharing the costs between beneficiaries). Whether it has achieved these goals is moot. Making the skills system more demand-led in practice has driven apprenticeship provision to ISCED level 5+, sometimes undertaken by an employer's existing employees, and done little to reverse the decline in the number of apprentices aged 24 years and under at levels 2 and 3 who are often in the process of making the education-to-work transition.

Skill policy making in England places a heavy emphasis on financial instruments to achieve its goals. Creating a demand-led skills system is dependent on the willingness of employers to make a direct monetary contribution to the training programmes in which they participate. In the case of apprenticeships this can have a transformative impact on the types of training provided: i.e. the shift to relatively costly higher level apprenticeships. If this reduces the number of apprenticeship starts then this, arguably, simply reflects the preferences of the market.

Train to Gain (2006 to 2010)

Author: Terence Hogarth

Context & description of Train to Gain

The Leitch Review (*Prosperity for All in the Global economy - World Class Skills: Final Report* (HM Treasury 2006) drew attention to the relatively large stock of adults with low level skills. It provided a succinct diagnosis of the UK's skills problem: "...the UK's skills base remains weak by international standards, holding back productivity, growth and social justice. The Review has found that, even if current targets to improve skills are met, the UK's skills base will still lag behind that of many comparator countries in 2020" (p.3). Although Leitch called for the skills system to be more demand-led, many of the Review's recommendations, subsequently implemented by government, were supply-side ones such as setting skills attainment targets (e.g. 95 per cent of adults should have achieved functional levels of literacy and numeracy by 2020).

Leitch's demand-side interventions relied heavily upon Train to Gain (TfG). An initiative introduced by government in the gap between the publication of the Review's interim (2005) and final (2006) reports. TfG, introduced in April 2006, was designed to assist firms identify the skill needs of their workers through the services of a skills broker who would then identify training providers to deliver whatever skill needs had been identified. It was a means of supporting firms, and in aggregate, the economy as a whole to escape the low-skills equilibrium which was, at the time, many commentators' diagnosis of the problem besetting the UK labour market. TfG was designed to build upon the Employer Training Pilots (ETPs) which tested the effectiveness of providing free or subsidised training to employees without an ISCED level 2 qualification linked to the provision of information, advice and guidance (Hillage et al., 2006).

The TfG service comprised:

- a skills brokerage service to advise employers on identifying training needs and sourcing training;
- flexible training, for example delivered in the workplace and at a convenient time, leading to an externally accredited qualification (e.g. a national vocational qualification, NVQ); and
- full public funding of training for eligible employees taking specified courses and qualifications with contributions to other training paid for by employers. Individuals eligible for TfG funding were those aged 25

years and over, who did not already possess a full ISCED level 2 qualification and were in employment.

Funding was provided by government through, initially, Learning and Skills Councils, and following their abolition, the Skills Funding Agency. Between 2006 and 2010 TtG had an estimated budget of around £2.4 bn.²²

The Leitch Review's recommendations vis-à-vis TtG were that: “. Train to Gain provides flexible training, designed to meet the needs of employers and employees. Providers only receive funding if they effectively meet the needs of their customers... The Review has concluded that this sort of approach must be embedded across the system so that providers only receive funding as they attract customers, rather than receiving a block grant based upon supply-side estimates of expected demand.” (p. 12). As a consequence, the Leitch Review recommended that TtG should be one of the principal conduits through which skills provision should be delivered to adults already in employment.

Assessment

The ETPs, on which the roll-out of Train to Gain was based, proved effective at engaging employers and employees: 23,000 employers and 200,000 employees were involved in the first three years of the ETPs (Hillage et al., 2006). But the econometric evaluation of the ETPs revealed no statistically significant evidence of additionality – i.e. no statistically significant increase in the percentage of eligible employers which would have provided ETP-equivalent training in the absence of the ETP was detected (Abramovsky et al., 2005).

The evaluation of TfG undertaken by the National Audit Office (NAO) demonstrated that the initiative had achieved a degree of success (NAO, 2009). It concluded the following.

- TtG provided a new means of engaging a substantial tranche of employers and employees in externally accredited training. Around 1.4 million people had started training (about 5 per cent of the workforce) and 554,100 learners had gained a qualification (NAO, 2009; House of Commons, 2010).
- TtG had a success rate of 71 per cent (i.e. the percentage of learners who achieved their learning aim as a percentage of all learners).

²² By 2009, it had cost £1.47 billion, with a further £925 million budgeted for 2009/2010 (NAO, 2009).

- Employers and learners reported that the training delivered had a positive impact on organisational performance with two thirds of employers reporting improved long-term competitiveness. Three quarters of employers said that training provided employees with useful job-related skills.
- It led to an increase in employer investment in training. Nearly half of participating employers made contributions to training costs.
- Skills brokerage helped to engage ‘hard to reach’ employers.
- It increased demand-led provision. Training providers increased their focus on meeting employer demand by making changes to how they delivered training (i.e. most training providers were flexible and responsive to employers’ needs).

A number of weaknesses were also highlighted by the NAO and the House of Commons Public Accounts Committee (PAC) (NAO, 2009; House of Commons, 2010).

- Around half of participating employers who had arranged training via TtG said they would have arranged the same or similar training in the absence of the programme, but it might not have led to a qualification.
- The performance of training providers was uneven with a substantial share failing to meet their performance targets.²³
- There were concerns about programme management. Unrealistic targets led to an underspend in the first two years, then a combination of relaxed eligibility criteria and the recession increased training demand leading to overspends.
- The NAO were of the view that the programme over all was not good value for money: “Unrealistically ambitious initial targets and ineffective implementation have reduced the efficiency of the programme” (p.7, NAO, 2009).

The **relevance** of TtG was the novel approach it adopted to engaging employers and employees in accredited training. Low participation levels in training were, and continue to be, a problem in the UK-England. As revealed above it was successful in raising training volumes and met both an economic need (skills to boost productivity) and a social one (increasing access to training in the adult population). The **coherence** of TfG rests in delivering large

²³ Twenty-six of the 100 largest providers’ overall success rates were below the 65 per cent minimum level (NAO, 2009).

scale CVET as a complement to IVET. Both provided the recipient with accredited, portable skills. It was also consistent with the government's strategic goal of ensuring training was demand-led. Because employers were involved in the identification of training needs it would lead to the provision of economically valuable skills. The evidence cited above demonstrates its **effectiveness** (i.e. engagement levels), but concerns were expressed about its **efficiency** (cost per learner and employer) though no benchmarks with other programmes were provided. The Leitch Review – and the subsequent implementation of its recommendations - placed strategic importance on role on TtG as a means of developing a demand-led VET system (and raising skill levels). Ultimately its **sustainability** was undermined by an incoming government in 2010 deciding that the money could be better spent elsewhere. The problem that TtG sought to resolve is still prevalent today.

Conclusion

Ultimately, TtG was abolished because of concerns over its financial management / cost control which, in part, stemmed from over-ambitious expectations of the programme's performance (NAO, 2009). A similar type of problem arose in relation to Individual Learning Accounts (2000 to 2001) where financial controls were unable to keep pace with demand. In retrospect, TtG may be regarded as an innovative intervention the execution of which required more careful management. TtG also highlights the degree of initiative turnover in England as policy makers experiment in an inventive way, with measures to increase skills demand.

TtG was novel in the way it developed a brokerage role to demonstrate the potential business benefits of delivering training / skills to employers and, thereby, increasing worker access to training which might improve their position in the labour market. As such it had economic and social equity goals. It was, possibly, a creation of its time. In 2010 following the financial crisis there were substantial cuts to public expenditure which may have made TtG an easy target.

Equipping adult workers with the skills required as a consequence of the twin transitions remains a policy challenge in the UK and the EU. The Leitch Review and its implementation attached substantial importance to the role of TtG in upskilling. The concept of brokerage service stimulating the demand for upskilling may still prove to have mileage in it yet.

Germany

ValiKom-Projects (2015 – 2024)

Authors: Chantal Marie Schumacher and Philipp Grollmann

Context & description of the instrument

"ValiKom" (Validierung non-formal und informell erworbener Kompetenzen, Validation of non-formally and informally acquired competences) was initiated in 2015 by the German Federal Ministry of Education and Research (BMBF) in collaboration with the Association of German Chambers of Industry and Commerce (DIHK) and the Central Association of German Crafts (ZDH). It is based on the recommendation of the European Council of Ministers from 2012 (BMBF, 2018), which promotes the validation of non-formal and informal learning at the national level. The follow-up project "ValiKom-Transfer" was launched in 2018 and will run until October 2024 (Wirtherle et al., 2021).

The two ValiKom projects were developed to address the shortage of skilled workers in the German labor market. In many European countries, including Germany, companies in various sectors face a lack of qualified personnel. Many people, especially young adults, do not have formal professional qualifications, despite having acquired relevant skills through practical experience, leading to limited employment opportunities and social participation (Wirtherle et al., 2024).

Against this background, the primary goal of the ValiKom projects is to establish a comprehensive validation process that recognizes and certifies these informally acquired professional skills, thereby promoting the professional opportunities of participants and ensuring the supply of skilled workers. Through such a validation process, informally acquired competences can in the future be compared with recognized vocational qualifications under the Vocational Training Act (BBiG) and the Crafts Code (HwO) (Müller-Werth et al., 2022).

The procedure covers the field of vocational training and is conducted at the national level, funded by national resources, particularly from the BMBF. A total of 32 competence centers from the crafts, industry, trade, and agriculture sectors have been established for 47 selected training occupations (e.g., retail salesperson, event technician, hairdresser, electronics technician, farmer, etc.). The entire process is accompanied by the participating chambers, continuously evaluated, and the results published (Valikom, n.d.; Wirtherle et al., 2021; Wirtherle et al., 2024).

The instrument is primarily aimed at individuals aged 25 and older who have relevant work experience but do not have a formal vocational qualification.

This includes career changers, people without a formal vocational qualification, or those with a qualification in a different profession, as well as people with professional experience acquired abroad. The validation is aimed at both German citizens and migrants and refugees. The instrument is free of charge for participants until the end of the project (October 2024) (Wirtherle et al., 2021; Wirtherle et al., 2024).

The validation process begins with a comprehensive consultation in which potential participants are informed about the process and requirements. Subsequently, they register and create a documentation of their work experience based on their individual resumes and experiences. The competences for the respective profession are then assessed by vocational experts from the chambers using practical tests, professional discussions, trial work, etc., based on established criteria from the training regulations. If the competences are successfully identified, no vocational qualification is awarded, but a certificate is issued that certifies the full or partial equivalence of the identified competences with the reference profession (Wirtherle et al., 2021; Wirtherle et al., 2024).

The ValiKom projects thus addressed both economic and social and personal development goals. The needs of the participants and companies are the focus, so that not only the professional mobility but also the personal self-confidence of the participants is strengthened. Economically, companies benefit from better qualification of their employees, which not only helps to address the shortage of skilled workers but also leads to more efficient use of existing specialists and targeted personnel development (Wirtherle et al., 2021; Wirtherle et al., 2024).

Assessment

Valikom existed over the period of two of the selected strategies: 'Advancement through Education' and 'National Continuing Education Strategy'. The instrument was explicitly part of the Federal Government's overarching strategy for the recognition and validation of non-formally and informally acquired skills. This strategy has also become a central component of efforts to secure skilled labour and promote lifelong learning as part of the National Continuing Education Strategy. ValiKom is also assigned to other overarching initiatives, such as VET 4.0, the national recognition strategy for qualifications and others.

To evaluate the instrument, an impact analysis of the validation procedure was conducted, encompassing both quantitative and qualitative surveys. Since July 2021, an online survey of participants has been ongoing, which had

a response rate of 56% with 525 responses as of May 31, 2023 (Wirtherle et al., 2024). This survey complements earlier surveys on the goals, satisfaction, and benefits of validation for participants and companies from 2018 to 2021 (Müller-Werth et al., 2022). Additionally, 40 people who successfully completed the validation process were interviewed using a guide, and participating companies were surveyed using online questionnaires and interviews. The evaluation was carried out according to the coding principles of Grounded Theory, focusing on the intervening and contextual conditions and the changes influenced by the validation (Wirtherle et al., 2024).

Overall, various positive changes in terms of professional knowledge, individual attitudes (motivation, willingness to learn, etc.), actions, and life situations were identified. These effects were achieved particularly through the elaborate and selective validation process, which follows a funnel-shaped selection principle. With each progressing step, participants are selected, so that during the survey period from 2018 to 2023, 7.450 initial contacts were documented, 5.137 led to initial consultations, and 2,012 people went through a validation process (Wirtherle et al., 2024).

Based on the descriptive results, the participants in the validation procedure are predominantly male (two-thirds) and on average 40.6 years old. About 44 % have a formal qualification, while 37% have no formal qualification and have acquired their competences informally. Most participants are employed (78 %) and have an average of 12.9 years of work experience, mostly full-time. The majority have German citizenship (57 %), followed by participants of Syrian and Turkish origin (Wirtherle et al., 2024).

The survey of participants ($N = 350$) showed that the certificate from the validation process provides highly desired official recognition of their skills, accompanied by high satisfaction with the process and positive changes in intrinsic motivation and self-concept. 98 % of participants stated that the procedure allowed them to demonstrate their abilities, even if the result was only "partial equivalence." This recognition can lead to increased motivation and further professional development opportunities. Additionally, the successful completion of the validation process opens new career development opportunities that were previously inaccessible due to a lack of vocational qualification: 70 % of the 365 participants reported preparing intensively for the external evaluation (textbooks, online tutorials, collegial exchange, training, etc.). Almost all participants (95 %; $N = 347$) rated the preparation as a positive learning experience, both professionally and in terms of their confidence in the evaluation situation. Moreover, 80 % of participants ($N = 293$) were able to apply the newly acquired professional knowledge in their work practice or job interviews. The confirmation of their professional

competences also provided many participants with a motivational boost for further qualifications, so that 46 % ($N = 242$) plan to continue their education after validation, whether through self-study, company training measures, continuing education courses, or even by taking external exams to obtain a formal vocational qualification to qualify for master or specialist exams (Wertherle et al., 2024).

The survey of companies ($N = 105$) shows that the validation process allows them to recognize and promote their long-term employees without vocational qualifications, which not only increases the skilled worker ratio of the company but also promotes job satisfaction, collegial cohesion, and personnel development. The certificate enables a better assessment of applicants' competences, facilitating hiring and identifying further qualification opportunities. While many companies report positive experiences, it is evident that the majority have not yet had certified applicants, suggesting that the validation process is not yet widely known (Wertherle et al., 2024).

Conclusion

In summary, the validation process does not replace a formal vocational qualification but offers professionally experienced individuals without a vocational qualification valuable opportunities for individual and professional development through the recognition of their competences. It strengthens participants' self-esteem and motivation, improves their career prospects and market positioning, and is often supported by employers.

With a total of 2.336 validation procedures conducted for 47 professions at 32 project chambers (as of June 2023), the ValiKom projects make a valuable contribution to securing skilled workers by promoting professional advancement through further qualifications, professionalization in professional actions, and expansion of professional knowledge and career orientation for participants. This leads to the recruitment and retention of skilled workers, targeted personnel development, and appreciation from companies (Wertherle et al., 2024).

The Valikom instrument makes it clear that promoted instruments in VET policy often take up challenges in VET practice that have existed for some time and develop solutions on this basis. Corresponding experiences are generally incorporated into the formulation of overarching strategies, while at the same time overarching topics and priorities identified there (e.g. from the European agenda) are incorporated into the development and differentiation of specific instruments. There is therefore a two-way relationship and it is not the case that a strategy is developed at a higher level which is then merely implemented at a lower level.

The approaches and experiences developed in the ValiKom project formed the basis for the Vocational Training Validation and Digitisation Act (BVaDiG), which comes into force on 1 January 2025. This law integrates the validation of vocational skills as a sovereign task of the authorities responsible under the Vocational Training Act (BBiG) and the Crafts Code (HwO), such as Chambers of Industry and Commerce (IHKs) and Chambers of Crafts (HWKs).

The 'Validation Service Centre' was set up to support the chambers in implementing this new task and began its work on 1 November 2024. Funded by the Federal Ministry of Education and Research (BMBF), it supports the chambers in establishing standardised structures and processes for the implementation of validation procedures.

The results and experiences of the ValiKom project have thus been directly incorporated into the design of the BVaDiG and the establishment of the Validation Service Centre in order to standardise and promote the recognition of informally acquired skills nationwide.

Bildungsprämie (2008 – 2021)

Authors: Chantal Marie Schumacher and Philipp Grollmann

Context & description of the instrument

The Bildungsprämie (Education Premium) was introduced in 2008 and ended in late 2021. It was part of the federal program to promote individual professional continuing education and training, co-financed by the Federal Ministry of Education and Research (BMBF) and the European Social Fund (ESF). The program's funding from the ESF is based on the regulations (EU) No. 1304/2013 and 1203/2013 of the European Parliament and the Council of December 17, 2013 (ESF Regulation, General Structural Funds Regulation). The primary responsibility for implementation lay with the BMBF, the ESF, and the Federal Office of Administration (BVA) for administration, with implementation carried out through a network of advisory centres.

Participation in continuing education and training in Germany is significantly lower compared to international levels. The main reasons cited for the lack of participation are primarily financial barriers, lack of information, and limited time resources, with financial barriers being identified as the biggest problem. There are various funding instruments trying to ease these challenges, one of which is the Bildungsprämie. It serves as an approach to increase participation in continuing education by providing financial incentives. The premium particularly targets individuals with low and medium incomes.

The goal of the Bildungsprämie was to increase participation in professional continuing education and training to mobilize low-income individuals who had not previously participated due to financial reasons. It included two instruments: a premium voucher (Prämiengutschein) to co-finance the costs of individual professional continuing education (50% personal contribution, maximum funding amount €500, validity six months). Co-financing is possible for both continuing education and training with job-specific content and continuing education that generally improves employability (e.g., basic education, languages, etc.). The second option is a savings voucher (Spargutschein), allowing savings accumulated under the Wealth Creation Act (VermBG) to be used early to finance continuing education without losing the employee savings allowance. The instruments can be used cumulatively.

The target group was employed individuals (no minimum age) with a taxable income of under €20,000 (single) or €40,000 (married) and a weekly employment of at least 15 hours. Participation in a counseling session was mandatory to ensure the sensible use of funds. Course fees were not limited, except in Brandenburg, Rhineland-Palatinate, Saxony, Saxony-Anhalt, and Schleswig-Holstein, where they were capped at €1,000. Requirements for the

continuing education provider included a location in Germany, legal recognition of the provider or the program, certification by a recognized quality model, and adherence to quality assurance aspects. The Bildungsprämie was implemented nationwide to promote lifelong learning in professional continuing education and was accompanied by primary data collection and panel surveys.

Assessment

The Bildungsprämie addressed the needs of its target group by lowering financial barriers to professional continuing education and training, thus enabling low-income employees to better access measures. This supported both economic goals, through the improvement of employability, as well as social and personal development goals by promoting individual educational participation. It was expected that the Bildungsprämie would contribute to improving the professional situation of the participants, increasing the likelihood of remaining employed and avoiding unemployment, enhancing chances of income increases and career advancements, strengthening the development of knowledge and skills, pursuing personal interests, and meeting new people. Overall, the aim was to develop an orientation and motivation to continuing education and training that not only generates future mobilization effects but also enhances subjective life satisfaction. The Bildungsprämie complemented other funding instruments for professional continuing education and training, that aim at filling gaps in the existing system. It was compatible with national and European education policies.

Throughout the entire funding period, over 405,000 premium vouchers (Prämiengutscheine) were issued. Based on evaluations and impact analyses, differentiated results were observed: Participation in continuing education funded by the Bildungsprämie led to participants significantly more frequently engaging in individual professional continuing education than comparable individuals without such funding. Positive results were also seen in the assessment of the benefits of the Bildungsprämie, with participants more frequently agreeing that the continuing education was worthwhile for handling new tasks, earning more money, acquiring skills for everyday life, expanding knowledge and skills, obtaining a qualification, and meeting new people.

However, there were no significant results regarding professional aspects such as higher job satisfaction, salary increases, job changes, increased working hours, performing a different activity, or promotions. Additionally, while participants often expressed a desire to become self-employed, this outcome was not attributed to the Bildungsprämie but rather to a sample bias.

In terms of mobilizing the target group, it was found that the premium voucher was intensively used mainly by low-income individuals, predominantly women, part-time employees, and those with intermediate educational backgrounds. The savings voucher was used very rarely, primarily due to its low level of awareness and the unsuitable target group, which often did not have sufficient savings. Thus, the Bildungsprämie largely reached its target group but was less successful in reaching low-skilled individuals and only those already inclined towards further education, where the savings voucher (Spargutschein) was not successful.

Regarding cost efficiency, the Bildungsprämie was considered a cost-effective measure overall, despite incurring costs such as direct costs for premium vouchers, administrative costs, and costs for counselling and information. The social and professional benefits justified the resources invested. The increase in costs per premium voucher over the funding period was mainly due to decreasing fixed-cost degression and rising administrative costs (from €533 in 2013 to €711 in 2017).

The Bildungsprämie was not continued because it did not achieve the expected widespread impact in practice and its administrative costs were considered high compared to its target achievement. Since then, the federal government has been focusing on structural solutions and broader funding programmes that are more responsive to the needs of companies and employees.

Conclusion

The Bildungsprämie was introduced in 2008 to encourage participation in continuing education. It was mainly aimed at low-income workers. It consisted of a premium voucher and a savings plan for continuing education. The aim was to reduce financial barriers to individual continuing education and to support lifelong learning. It had short-term positive effects on participation in continuing education; however, long-term effects were less noticeable.

The Bildungsprämie was included in the National Strategy for Lifelong Learning (2008) as well as the National Skills Strategy (2019). The integration of the Bildungsprämie into the ESF program and the National Strategy for Lifelong Learning (2008) increased visibility and access to EU funding. Without the strategic framework, the implementation and financing of the Bildungsprämie would have been more challenging. However, in order to achieve sustainable participation in continuing education and training, additional measures and specific interventions beyond financial incentives will be required.

Norway

Tripartite industrial programmes for skills development (2019 – present)

Authors: Torgeir Nyen

Context & description of the instrument

An important policy measure in skills policy over the last five years have been the industrial level tripartite programmes for skills development, which were first implemented in 2019. These programmes are related to the Norwegian Strategy for Skills Policy 2017-2021 and was launched by the Conservative-led Solberg government (2013-2021), which had also initiated the strategy. The programmes were first administered by the government agency responsible for skills policy, *Kompetanse Norge*, and later by the Directorate for Higher Education and Skills. The directorate was established in 2021, when several government agencies were merged into the new directorate. Employer and employee organisations at the industrial level have played a major role in developing skills development measures, especially courses at vocational colleges.

The programmes offer national level targeted funding for vocationally oriented skills development within selected industries. Their aim is to increase participation in skills development. More specifically, they aim to provide workers, laid-off and unemployed in industries in transition with the competence required to perform new tasks. Transition can for instance be related to new technology and production methods. These goals can be seen as well aligned with *Arbeidslinja*, the overall policy goal of keeping as many as possible in the labour market. The decentralised nature of the programmes stems from a realisation that it is difficult for national level skills policies to impact individual and company level decisions.

Initially, in 2019-2020, there were two programmes, one for municipal health and social care, and one combined for industry/manufacturing and construction. Within these two industries, the main employer and labour organization(s) agreed in working groups on a set off skills development measures that addressed skills needs within that particular industry. 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 courses offered were by vocational colleges for people with vocational education, but there were also many other types of courses, for instance courses for workers without formal qualifications. These courses were more hastily developed, re-

designed or simply scaled up from existing ones to deal with the growing number of laid-off workers and workers who had lost their jobs. In these programs, tripartite program boards decided on priorities. In 2022, there were a re-shuffling, with three new programmes established and eight continued, leaving a total of eleven programmes. From 2022, education institutions apply for funding and the Directorate for Higher Education and Skills decides within priorities set by the program boards. In 2024, the scheme was scaled down significantly to five programmes, which will run until 2027.

The target group has primarily been people with little education and people with a vocational trade certificate, but with variations from programme to programme depending on which groups were considered to have the greatest skills needs. During the pandemic, laid-off or unemployed workers were added as a target group in addition to workers. Vocational colleges have been the most important course supplier.

According to data²⁴ from the Directorate for Higher Education and Skills, by June 2023, the programmes have received a total funding of around 490 mill.kr. (€ 42,9 bill.) The number of participants were 43 652 and the number of courses 1 214.

Assessment

An evaluation of the tripartite programme based on the period 2019-2021 shows that the programmes as intended have reached target groups that often participate little in education and training (Aspøy et al. 2022)²⁵. Less is known across programmes to which degree participants have completed and developed relevant competence, but from the two initial programmes, available interview data shows that most participants complete and that most participants rate the education and training as highly relevant to their work.

As mentioned above, the instrument has addressed economic goals from both an individual and societal perspective. Although the tripartite programmes are not mentioned or fit very closely to the stated priorities in the 2017-2021 skills strategy document, they can be subsumed under “better learning in working life” and “developing relevant continual and further education”. Furthermore, the tripartite method is very much in the same vein as the strategy. The policy instrument, the tripartite programmes, is not

²⁴ «Bransjeprogrammet 2021-2022.En oppsummering av data innhentet gjennom rapporteringer i treparts bransjeprogram for kompetanseutvikling.» Notat nr. 08/2023. Direktoratet for høyere utdanning og kompetanse.

²⁵ <https://www.fafo.no/images/pub/2022/20803.pdf>

dependent on the strategy document itself, but it would be fair to say that the whole process of making the strategy made tripartite programmes a natural choice of policy instrument. In its initial form, the programmes apply the same process, but on a more specific level. Tripartite cooperation in policy making, especially for labour market related policies, has a long tradition in Norway, but was revived for skills policy under the Solberg government, starting already with the process around the OECD Skills Strategy Diagnostic Report in 2014.

The tripartite programmes are part of a wider set of policy instruments aimed at developing more relevant skills development for work life. While the tripartite programmes have a special emphasis on the vocational college sector, another funding schemes derived from the strategy, the funding for flexible and decentralised education, target universities and university colleges.

The evaluation of the tripartite programmes 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 stimulated development of work life-relevant education and training and stimulated participation in prioritized target groups. As mentioned above, the programmes have been fairly successful in reaching target groups that often do not receive much training. The programmes have helped establishing labour market relevant skills development which would not have been established in the absence of these programmes. In some industries, for instance the industrial programme, it has also improved cooperation between vocational colleges, companies and organisations. The vocational colleges have also become accustomed to providing not only long (0,5-2 year) educations, but also shorter, tailor-made courses. It is difficult to assess to what degree the positive effects are self-sustaining or depend on continual funding. It is unlikely though that employer or employee funding will fully compensate lack of public funding, so activity levels will drop with the withdrawal of public funding.

It is almost impossible to assess the cost-effectiveness of such a diverse set of education and training courses. While some have been very intensive, delivering highly relevant and comprehensive courses to a small number of participants, for instance in municipal care, others have been very extensive with short courses delivered to a high number of participants, especially during the pandemic. The pandemic also alters cost-benefit considerations as the alternative cost of spending time on training is much lower for laid-off or unemployed unable to find work. The evaluation does not say anything about

effects on unemployment, productivity etc., which would in any case be difficult.

Conclusion

The industrial level tripartite programmes for skills development reflect the overarching skills strategy's focus on economic goals and on tripartite and bipartite cooperation. The programmes are inclusion-oriented, they intend to provide skills to aid workers in industries in transition or had high numbers of laid-off or unemployed (during the pandemic) to stay in the labour market. In the short term, the programmes must be considered rather successful which can be attributed to the bipartite or tripartite process of establishing relevant courses.

The long-term impact is harder to gauge. While the two initial programmes from 2019 helped establish or improve cooperative relationships between organisations, individual companies, clusters and vocational colleges, the later programmes became much more “crisis management”-programmes which didn't had that effect. Very experienced members of the program boards helped secure the relevance of the skills development offered, but the programmes did not create new cooperative partnerships. The vocational colleges have however gained much experience in providing short courses, which has changed the sector.

The main strength of the policy instrument is *relevance*. The involvement of industrial level stakeholders (and clusters) in a tripartite cooperation has helped developing relevant courses, which at least to some degree has overcome the challenge of influencing local level decisions with national level policies (Aspøy et al, 2022:75). The lessons learned on tripartite cooperation from the original programmes were considered very useful in mobilising new programmes in the very different “crisis-management” context which the pandemic created. There is a risk of lower relevance in these programmes because of the much-simplified process, but there is no evidence to support that. However, the method is more challenging to apply in industries with low levels of organisation on both the employer and employee side, both because it is more difficult to assess the skills needs and because it is more difficult to inform and mobilise potential participants. Such industries also often have many low-skilled employees where the need for skills development may be high.

Career guidance as a duty and a right for refugees and immigrants (2021-)

Authors: Tove Mogstad Aspøy

Context & description of the instrument

The right and duty for newly arrived refugees and immigrants to participate in career guidance was implemented in 2021. The instrument is related to the Norwegian Strategy for Skills Policy 2017-2021, and it is stated in the integration act ((*Integreringsloven - Lovdata Pro*, u.å.)§11). The act was effective from January 2021. The leading stakeholders are the county administrations, who own the regional career centres, often in joint partnership with the Labour and Welfare Administration (Nav) offices at the regional level. The government was the Conservative-led Solberg government (2013-2021).

The career centres existed prior to the legislative change, and the counties' duty to offer free career guidance for all inhabitants was established by law in 2020 ((*Opplæringslova - oppl - Lovdata Pro*, u.å.), §13-3f). The instrument thus entails an extension of scope, from a voluntary public opportunity catering to the county population in general, to also being a right and duty for certain target groups. This extension of scope is tightly connected to the *Introduction programme* for newly arrived refugees and immigrants. The introduction programme is a training programme intended to prepare refugees and immigrants for transition to work or education in Norway. Certain refugees and immigrants have a right to such participation, while others have both a right and a duty to participate²⁶. The target group is legally defined as all immigrants from the age of 18 to 55 years, with a legal resident permit, settled in a municipality according to an integration authority agreement, with a right and duty to participate in the introduction program for newly arrived refugees and immigrants. The person must have resided in the municipality for less than two years. Refugees under collective protection have a right, but not a duty, to participate (Integration act, §37 b).²⁷ With the new Integration act of 2021, it was decided that those who have a right and duty to participate in the programme, also have a right and duty to participate in career guidance.

²⁶ Right and duty follows the statutory authority for the individual's residence permit. Right and duty to participation in the program does not encompass all immigrant groups, e.g. immigrants from the EU-area and Nordic countries are ruled out. Ukrainian refugees, i.e. refugees under collective protection, have a right, but not a duty to participate.

²⁷ Career guidance for those with a right, but not a duty, to guidance/introduction program, is excluded here.

As mentioned above, career guidance as a right and duty for new refugees is related to the Norwegian Strategy for Skills Policy 2017-2021. The instrument can also be traced back to the official Norwegian report (NOU) *Norway in transition – career guidance for the individual and for the society* (NOU, 2016). The report describes career guidance as an important instrument to help immigrants make better use of the skills they already possess upon arrival in Norway, and for the society to make better use of immigrants' resources. Furthermore, it is described as an important means to reach integration policy goals of rapid labour market integration.

Career guidance as a right and duty was introduced in order to help the individual make better use of their skills, to enable people to make informed choices related to education and employment, and to make the introduction programme better tailored to individual goals (NOU 2016:7, p. 191) (Flatø et al., 2023). The aim can thus be regarded as both a social and an economic one. There is political consensus in the Norwegian policy discourse that labour market inclusion is a crucial for social inclusion. Long-term labour market inclusion is also perceived as the most cost-efficient means to individual integration.

While the county administration is responsible for career guidance, the municipalities are responsible for organising the integration programme and developing an individual training plan, called the Integration plan, in cooperation with the participant. Both duration and content are adapted to the participant's educational level, work experience and progression in Norwegian language learning. The Integration plan is to be decided by the municipality of residence within three months after settlement (stated in the integration act). According to the integration act, the career guidance should inform the decision of the content of the introduction program, and the career guidance should thus take place prior to mapping out the integration plan. The guidance lasts for approximately 1,5 hours and is normally given individually (not in groups). The guidance can be performed either physically or online, but physical guidance is more common (Flatø et al., 2023).

The career guidance for the target group is financed through career centres ordinary budget, allocated through the counties' budget, although some extra grants are available. The Norwegian Directorate for Higher Education and Skills (HK-Dir) is the executive agency for the Ministry of Education and Research within the higher education and higher vocational education sectors and is responsible for the national skills policy. The overarching responsibility of career guidance quality is managed by the directorate, which is also head of the National forum for career guidance, which gathers twice per year. The

forum consists of representatives from the regional career guidance networks: authorities, third sector and career guidance services. (HK-Dir, 2023)

Assessment

On a conceptual level, mandatory career guidance responds to both beneficiaries and country needs. It responds to the overarching goal of the strategy document, with its aim of aiding “good choices for the individual and the society”. Newly arrived refugees normally lack knowledge of the Norwegian labour market opportunities and educational system, and career guidance may function as an important information channel. Furthermore, if the content of the introduction programme is tailored to individual career plans, a smooth transition to education or labour market is more likely.

An evaluation of the implementation and functionality of career guidance for the target group showed that cooperation between career guidance services at the county level, and the municipal programme counsellor responsible for the participants in the ‘introduction programme’ (see above), was at times hard to establish. Such collaboration is important, because the career guidance is supposed to inform the individual’s integration plan, which is developed by the integration programme counsellor. The municipal integration programme counsellor generally knows both the participant and the local labour market, but did often not have time to partake in county-level career guidance services together with the refugee. Although the evaluation demonstrated that cooperation between county-level career guidance services and the municipality-level programme counsellor often ran smoothly, mismatch between career guidance and the programme counsellor’s view could be a source of contention (Flatø et al., 2023). One reason for this was that career guidance as a concept generally caters to individual’s needs and long-term dreams. The municipal integration unit’s concern is, however, individual integration and general well-being, but it is also measured on labour market participation, which is necessarily in harmony with individual career dreams. Moreover, counsellors from the municipalities’ introduction programmes sometimes felt that the career guide was at times unrealistic on the participant’s behalf (Flatø et al., 2023).

Flatø et al. (2023) states that although early career guidance may inform the content of the introduction program at an early stage, the timing is perhaps premature. Newly arrived refugees may struggle with everything from war traumas to understanding how to settle their children in a new school, and planning for a career path may not be realistic within three months after being settled. Furthermore, although the career guidance itself may offer useful information on the Norwegian context, a higher level of knowledge of the

Norwegian society would have made the career guidance more useful for the individual, career guides felt. In addition, the approval of education from abroad may take some time. Many career guides and municipal counsellors thus preferred to offer the career guidance at a later stage, especially for refugees who struggled with other challenges.

Nevertheless, insofar as the goal of the instrument was a full coverage of participation for the target group, the goal has been reached (Flatø et al. 2023). Participation is registered at a municipality level and reported to the Directorate of Integration and Diversity (IMDi).

The process of extending the scope of career guidance, from a voluntary opportunity to a mandatory instrument serving integration goal, started prior to the strategic policy document. As mentioned above, it can be traced back to an official report of 2016 (NOU2016:7). There is reason to believe that it would have been implemented even without the strategy, but it could also be argued that the strategic document served as an important driver for the embeddedness of career guidance in the integration act of 2021, and the change in the education act in 2020.

It is likely that career guidance as a right and duty for newly arrived refugees will continue in the future. However, it is possible that the structure of the guiding may change in order to improve the timing.

Conclusion

Career guidance as an instrument is a fairly isolated one, and does not necessarily impact system-level. However, a closer cooperation between the municipality, NAV, education providers and working life and career guidance services may improve the pertinence of the guidance, and thus improve labour market integration or educational match for refugees. This will probably require a change in how the guidance is structured, for instance, as two guiding lessons instead of one, to ensure a better follow-up on the individual level.

The evaluation of career guidance as a duty and a right for newly arrived refugees (Flatø et al., 2023) states that good communication and a clear understanding of actors' roles are prerequisites for a well-functioning career guidance. Both career guides and municipal advisors underline the need for upskilling. The career guides need more skills on the integration act and on how to better communicate with refugees. Municipal advisors and counsellors need more knowledge on what career guidance is, and how it may contribute to the overarching goal of integration of refugees. The refugees themselves expressed mixed opinions on the career guidance. Some stated

that the guidance offered hope and support in pursuing their goals. Others did not perceive the guidance as useful. Others again described a gap between the career guidance and obtainable goals within the scope of the introduction program. Three changes for the future were suggested: the goal of the career guidance must be clarified, the timing must be adjusted to the refugees' circumstances of life, and the guidance should be structured according to a more long-term process.

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This working paper was authored for Skills2Capabilities by Daniel Unterweger, Svetlana Alexandrova, Tove Mogstad Aspøy, Pepka Boyadjieva, Philipp Grollmann, Günter Hefler, Terence Hogarth, Petya Ilieva-Trichkova, Veneta Krasteva, Chantal Marie Schumacher, Torgeir Nyen, Eva Steinheimer. This paper is a deliverable from Work Package 2 on Skills Policies, led by 3s.

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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