



[D 2.3 – COMPARATIVE REPORT ON SKILLS STRATEGIES]

Skills2Capabilities

Working Paper

Version date: 19.12.2024

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## ABSTRACT

Education and skills have the potential to improve both economic performance and societal well-being, while tackling overarching challenges such 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 prominence, systematic approaches for comparing skills strategies and their implementation across countries are scarce. In this report, we conduct a comparative analysis building on in-depth case studies of strategic policy documents on skills in five countries: Austria, Bulgaria, England (UK), Germany, and Norway. We identify the strategies' main benefits for the countries' skills systems and interrelatedly the effectiveness of their specific policy measures, as well as frequent barriers for implementation and the central success factors of such strategies. The study shows that skills strategies which are encompassing the preferences of broader groups of stakeholders, adaptable to changing circumstances and internally consistent are particularly well suited to mitigate potential barriers for implementation. The analysis suggests that while skills strategies can trigger incremental, gradual institutional change by building foundations for policy coordination, reinforcing policy priorities and improving complementarity between individual policy measures, their potential for bringing about outright, disruptive institutional change is limited.

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

For more information please visit [skills2capabilities.eu](https://skills2capabilities.eu)

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## 1 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 such 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 emphasised 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 activities on Lifelong Learning (European Parliament & Council of the European Union, 2006). However, despite this prominence, systematic approaches comparing strategic policy documents and their implementation across countries are scarce.

In this report, we conduct a comparative analysis of strategic policy documents on skills in five countries: Austria, Bulgaria, England (UK), Germany, and Norway. Thereby, we build on five individual case studies which are included in the Skills2Capabilities Report D2.1, capturing the main foci of these countries' strategic documents and the extent of their implementation. Furthermore, we draw upon an assessment of policy instruments implemented in the framework of these strategic policy documents, included in Report D2.2. *Building on this empirical material<sup>1</sup>, this report (D2.3) compares the analysed strategic policy documents and their implementation, in order to learn more about the central benefits of applying skills strategies and to identify the barriers and success factors relevant for implementation of the strategic policy documents.*

While the report demonstrates that skills strategies are hardly a panacea for reforming skills systems, skills strategies can certainly *improve* skills policy-making by creating foundations for policy coordination and facilitating change, increasing complementarity between policy measures, and reinforcing policy priorities among decision-makers. In short, skills strategies can trigger incremental, gradual institutional change, but their potential for bringing about outright, disruptive institutional change is limited. Furthermore, cross-country comparative analysis suggests that skills strategies’ benefits cannot

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<sup>1</sup> Both reports are available on <https://www.skills2capabilities.eu/results.html>

be taken for granted, as they can be interrupted by a wide range of barriers external to the strategy process and internal to the strategy process. The study shows that skills strategies which are encompassing the preferences of broader groups of stakeholders, adaptable to changing circumstances, have inbuilt feedback loops and are internally consistent are particularly well suited to mitigate potential barriers for implementation.

The report is structured as follows. Chapter 2 provides an introduction and literature review on strategic policy making in the area of skills policy and presents our theoretical orientation. Chapter 3 presents the methods, research design and case selection strategy of the research. In Chapter 4, we give an overview of the skills strategies analysed in the case study countries and summarize their main thematic focus as well as the design characteristics of these skills strategies by distinguishing between two different types of approaches: “agenda-setting strategies” and “blueprint strategies”. Subsequently, we summarize the main benefits of the strategic policy documents in the observed countries, showing how the overall skill formation can profit from such a strategic approach to skills policies, and how individual policy instruments can benefit from being implemented as part of an overarching strategic policy document. As these benefits could only be partially realized in the observed countries, Chapter 5 then addresses the barriers to implementation the observed strategies have encountered. Chapter 6 in turn shows which potential success conditions can mitigate these barriers. Chapter 7 provides a conclusion.

## 2 Strategic approaches to skills policies

Policy makers have increasingly attached importance to the role of skills in bringing about social well-being and economic performance. The recent prominence of mega-trends in political discussions, including the twin digital and green transition, demographic changes and the recent Covid-19 pandemic, have further strengthened this focus, as seen in the European Skills Agenda's aims to improve and adapt skills development and use to such challenges (European Commission, 2020b). Future job growth will to a significant extent take place in the service sector, while jobs in “non-green” industries (those dependent on fossil fuels and energy-intensive manufacturing) are projected to decline (European Commission, 2020a). An ageing workforce necessitates a renewed focus on lifelong learning and updating of skills, increased investments in skills in the health sector, as well as skills policies accommodating substantial replacement demands resulting from working retirement (Cedefop, 2012, 2018). Studies have shown that due to digitisation and automation and the continued growth of the service sector, skill demands of businesses are changing, and ICT and soft skills are becoming more important (Cedefop, 2018; Helmrich et al., 2016). At the same time, certain skills, for example with regard to ICT and soft skills, also become more and more essential to participate in society and democracy, as for example the increase of digital forms of communication and E-government have shown.

In the past two decades, an increasing share of countries have used strategic policy documents in the area of skills policy to tackle these challenges. 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 et al., 2021). Strategic policy documents are not confined to skills policies, but historically, have developed into a frequently used tool in many policy areas. As Steurer (2007) emphasises, up until the late 1990s, policy strategies were usually seen as tools for top-down planning within a single organisation (e.g. a ministry, government agency, etc.) for “getting people to do what they are told, and keeping control over a sequence of stages in a system” (Parsons, 1995).

Today's strategic policy documents in the area of skills policies align with concepts from Strategic Public Management emphasising “policy integration” that see “the implementation process as an integral part of the strategy process” (Steurer, 2007). In this view, designing and implementing optimal policy solutions depends on coordination of policy-making across all

organisations relevant in the respective policy field. Aligning with historical institutionalist scholarship, strategy “design and implementation are not seen as taking place on a clean slate, but as always embedded in pre-existing [...], institutions, practices and established actor networks” (Rayner & Howlett, 2009b). Optimal solutions can consequently not be achieved by one organisation alone, as the institutional set-up of many policy-fields shows vastly dispersed responsibilities across multiple organisations, each applying their own (partly overlapping) policy instruments. These complex institutional landscapes are partly the result of “long periods of incremental policy change” that have led to “disorganized policy mixes” (Rayner & Howlett, 2009b; Streeck & Thelen, 2005).

In sum, strategic policy documents are currently seen as means to design and implement improvements in a certain policy field by coordinating policy-making across all stakeholders relevant in the respective policy field over a longer period of time (OECD, 2019). This includes horizontal coordination (across multiple Ministries or organisations at one specific level of government), vertical coordination between different levels of government, as well as coordination beyond government involving broader groups of stakeholders (e.g. social partner, civil society, etc.) which can “help not only to identify widely accepted solutions” but also contribute to “sharing information and better understanding complex problems” (Steurer, 2007). Furthermore, in contrast to previous traditions of strategy design, strategic policy documents following this school of thought often also focus on monitoring the implementation process and results, often by means of quantifiable key performance indicators (KPIs) (Nordbeck & Steurer, 2015).

The rise of strategic policy making in the area of skills and the emphasis organisations such as the OECD and the EU place on such strategies in their respective policy recommendations is hardly surprising. As for many other policy fields, the governance structures of skills policies are complex. In terms of responsibilities within government, skills policies often lie at the intersection between ministries responsible for educational policy, labour market policy, and economic policy, among others, each applying their own policy instruments. Furthermore, with great variations across countries, a multiplicity of actors are involved in the provision, financing, reform and day-to-day administration, ranging from different levels of government to stakeholders such as employers, their associations, labour unions, and education and training providers (Busemeyer & Trampusch, 2012a; Emmenegger et al., 2019). Consequently, in the past two decades, the OECD promoted manifold national skills strategies in its member countries (OECD, 2019), an approach which has also been highlighted as essential by the new



European Skills Agenda (European Commission, 2020b). Similarly, a variety of countries have launched dedicated Lifelong Learning Strategies, in part (but not exclusively) in relation to the European Union's focus on Lifelong Learning (European Parliament & Council of the European Union, 2006).

However, only rarely have these skills strategies become the central object of research, and “little is known about the effectiveness, results and impact of developing such strategies” (Working Group on Adult Learning, 2022). No studies are known to the authors observing how different countries approaches towards national skills strategies and their goals and implementation have developed over time. In applied research literature and national monitoring and evaluation reports, the topic of strategic documents on skills has become more pronounced in recent years, however, not without shortcomings. Isolated analyses of individual strategies exist (G. Hefler et al., 2018; OECD, 2021; Unterweger, 2020), as well as reports that provide a cross-national, descriptive overview of existing national lifelong learning and skills strategies (Andriescu et al., 2019; European Commission et al., 2015, 2021; Working Group on Adult Learning, 2022). These accounts however do not attempt to provide broader lessons learned for the design and implementation of national skills strategies that would at least allow for “contingent generalization” across a “bounded population of cases” (Beach & Pedersen, 2016b, p. 44). Most recently, OECD (2024) and Working Group on Adult Learning (2023) have used surveys and/or workshops among leading stakeholders of skills strategies to identify a set of policy recommendations assisting the further development of skills strategies. While these provide useful theoretical building blocks for further research to identify success factors of skills strategies, they paint an overly optimistic picture of what can realistically be achieved by means of strategic policy documents, and potential barriers for implementation remain relatively unexplored.

In contrast, broader academic literature paints a contradictory, even pessimistic picture on the benefits of strategic policy documents. Apart for some exceptions (Markowitsch et al., 2013), contributions to assess strategic policy documents exist mostly in other policy areas, in particular sustainable development and land management (for a review, see for example Aubrechtová et al., 2020). The most frequently cited accounts usually built on business management literature (Doran, 1981; Drucker, 1977) and promote a SMART approach of designing strategic policy documents. Strategic policy documents should consequently be *specific* in defining their main goals and actions (i.e. policy instruments to achieve these goals), *measurable* by certain indicators to track progress, *assignable* to a specifically responsible stakeholder, *realistic* given available resources, and *time-related* (specifying

when results are to be achieved). Similarly, building on Hall (1993), Rayner and Howlett (2009b) emphasise that successful implementation of strategic policy documents depends on a how “policy goals and means [actions] are (or are not) linked in a consistent and coherent fashion”, more specifically the “relationship among and between goals and instruments at the level of general ideas and at the level of operationalized program elements”.

However, such consistency can rarely be found in strategic policy documents (Aubrechtová et al., 2020). In general, there appears to be an increasingly pessimistic consensus that strategic policy documents – while their theoretical potential for strengthening public management is acknowledged – remain a “tool with an ambivalent record (conceptually strong, but weak in delivery)” (Steurer, 2007). While some accounts consequently even propose to abandon the use of strategic policy documents as “an approach that has obviously failed” (Casado-Asensio & Steurer, 2014; Nordbeck & Steurer, 2015), we suggest a different – and more nuanced – way forward. One drawback of existing academic literature on strategic policy documents is that they mainly focus on technical factors for the success of strategic policy documents – e.g. internal consistency and coherence – but largely disregard political dynamics. However, as Steurer (2007) highlights, strategic policy documents often fail as they are “driven by some administrators who have limited political leverage, but who are not capable of shaping key policy decisions in line with the strategy objectives”. A fruitful way forward, consequently, can be to “make strategies more strategic by explicitly dealing with the context of limiting polity structures, actors constellations and the ways public administrations work” (Steurer, 2007).

Drawing on Raffe et al. (1994) and Wheelahan (2015), we consequently analyse skills strategies with regards to factors connected to their “intrinsic” as well as “institutional” logic. A strategic policy documents’ intrinsic logic captures the policies main rationale, purpose and intended outcomes, as reflected in strategic public management literature focusing on the internal consistency and coherence of strategies’ goals and actions. However, as argued Raffe et al. (1994), and aligning with current historical institutionalist literature, the penultimate outcomes of a reform or strategy are not only dependent on its intrinsic logic, but are always mediated by an institutional logic that depends on the context in which the respective reform is embedded. The institutional logic encompasses the strategies’ interplay with “economic and social interests of different constituencies as well as the construction of education sectors and the institutions within them”, including political dynamics and “relationships between key stakeholders and social partners” (Wheelahan, 2015) relevant for the implementation of the strategy.

Consequently, a comprehensive analysis of strategic policy documents' broader success factors and barriers for implementation necessitate to study not only factors related to skills strategies' intrinsic logic, but also the way in which the institutional logic influences their success. This allows to arrive at a more nuanced picture of what can, and what cannot be achieved by means of strategic policy documents.

In sum, this study aims to generate (cross-country and intertemporal) comparative insights in order to understand the political-economic dynamics behind strategic policy making, aiming to support the development of the next generation of such policy-documents while at the same time contributing to the broader academic literature on strategic policy making. The report's main aim is twofold. First, it illustrates what can realistically be achieved via strategic policy documents and what not, thereby providing policy-makers a pragmatic picture of their main benefits and limitations. Second, by staying attentive to the broader context of strategy implementation – observing factors external to the respective strategy process and factors internal to the strategy process – we aim to identify barriers of implementation strategic policy documents face, and provide broader lessons learned for policy makers in order to mitigate these barriers.

### **3 Methods, research design and case selection**

Comparative analysis in this report is based on empirical material gathered in Report D2.1 and Report D2.2 of the Skills2Capabilities project. Report D2.1 includes five in-depth country case studies capturing the overall design and implementation of skills strategies. These case studies observe how strategies and their goals developed in a given country over time, the balance between economic and/or social and 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. Report D2.2 extends the analysis of the implementation of the strategic policy document by assessing two specific policy instruments per country implemented in the framework of strategic policy documents, thereby providing insights into the added value of implementing policy measures within a larger strategic framework.

Methodologically, the case studies rely on desk research and semi-structured expert interviews. The majority of analysed data for this work assignment results from desk research, most importantly an analysis of primary documents (the respective strategic policy documents themselves as well as available accompanying/monitoring reports), existing academic literature and applied research on the topic, and available information on the respective online presence of the responsible national authorities. Complementary

semi-structured expert interviews (Hammer & Wildavsky, 1983; Leech, 2002; Mills et al., 2010; Tansey, 2007) were conducted with national stakeholders in order to fill gaps of knowledge that could not be addressed via desk research and to triangulate findings of desk research. Country researchers tailored their questionnaires according to the extent of already gathered information in desk research and still existing gaps in knowledge, with focus on the latter; as well as the background of the respective interviewee and field of responsibility/expertise, with certain questions (e.g. on specific policy actions) only to be asked of individuals knowledgeable about them. Interview data gathered in this work package is therefore used as one source alongside other available information (e.g., primary and secondary documents and literature), with the various sources of information complementing each other and enabling triangulation (Beach & Pedersen, 2016a; Blatter & Haverland, 2012). More information on primary data can be found in Deliverable D2.1 and Deliverable D2.2.

The case studies cover at least two major skills strategies in Austria, Germany, Norway, Bulgaria and the England (UK). This country selection covers the main types of skill formation systems present in Europe: collective systems (based on strong social partner involvement, employers as well as the state); statist systems (with the state primarily responsible for skill formation) ; liberal systems (with skill formation primarily left to market forces), as well as transitional systems (combining multiple elements of the above). We cover different geographical regions within Europe (North, West, East) and countries of different sizes. Furthermore, we look at different adult learning systems concerning their participation rates (high, medium, low) and the extent of involvement of the state and employers in funding and providing adult learning. Furthermore, we are currently exploring the opportunity to add an additional case study on Korea<sup>2</sup>.

The chosen case selection strategy allows for systematic comparison of the design and implementation of strategic policy documents in different countries in order to isolate overarching benefits, key conditions for success and barriers to implementation. On the one hand, we can compare cases where the foreseen actions and goals of skills strategies have largely been implemented, respectively the necessary conditions for success in implementation. This will be undertaken by using “Mill’s Method of Agreement”, i.e. a “most different system design” (Ragin, 1989): Despite the chosen countries’ differences with regard to several key characteristics (see

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<sup>2</sup> Carried out by the newly associated partner of the research project, KRIVET, the Korean Research Institute for Vocational Education and Training.

above), what are the common benefits of strategic policy documents in the observed countries, and which factors in the design of strategic policy documents on skills enabled the successful implementation of the strategy? On the other hand, the same approach can be applied for national skills strategies with a less successful implementation process. In other words, what are the common barriers that led to an only limited implementation of these strategies? In a complementary step, we can also compare successful and unsuccessful skills strategies within a country using “Mill’s Method of Difference”, i.e. a “most similar system design”. In other words, given the same country context, what are the key differences in strategy design that enabled success of one strategy and led to the failure of the other?

Table 3.1 Country selection

Country selected	Skill formation	Adult learning	Region/ Population (million)
DE	Collective	Initial education and training provides appropriate skills. Above-average participation in adult learning	Central 83.4
AT	Hybrid (Collective/Statist)	Initial education and training provides appropriate skills. Above-average participation in adult learning	Central 9.2
NO	Hybrid (Statist/Collective)	Prevalent, often subsidised by the state	North 5.6
BG	Transitional	Participation low, inequality on participation quite high	East 6.4
ENG	Liberal	Relatively widespread, unevenly distributed, mostly in-company training	West 58.1

Note: Types of Skill Formation Systems taken from Busemeyer and Trampusch (2012a); Nyen and Tønder (2020); Seitzl and Unterweger (2022); Tutlys et al. (2022); patterns of adult learning taken from by Boeren et al. (2017); Saar et al. (2013). Population size taken from Eurostat demo\_gind [access 11.12.2024] for 2024 and UK Office for National Statistics for 2022.

For the selection of strategic documents in each country, we identified cases for analysis based on the following criteria:

1. The focus was on *major*, high-level, large-scale skills strategies that encompass more than one educational sector (e.g. initial vocational training and continuing vocational training, general (liberal) adult education and job-related adult learning, continuing vocational training and higher education, etc.). In other words, the aim was to identify “integrated strategies” with a “multi-sectoral scope” as widely promoted in strategic public management (Steurer 2014), by international organisations (as the OECD), and other key actors.
2. Only strategies the planned timeframe of which had already concluded (as of September 2023) were considered, allowing for an assessment

of strategy implementation. Preference was given to more recent strategies to ensure that the analysis remains relevant for current policymaking.

Based on these criteria, in most cases, the most recent major strategic policy documents on skills whose timeframe is already over, as well as its predecessor strategy, were selected for analysis (see the figure below). For several other chosen documents, follow-up and still running strategies are in place which allows to draw conclusions on how experiences made are taken up in current discussions. For Bulgaria, the *National Strategy for LLL 08-13* (BG1) and its direct follow-up *National Strategy for LLL 14-20* (BG2) were selected. For the UK, the first document for analysis is the *Leitch Review of Skills* (UK1) followed by the *Skills and Sustainable Growth* document that in many regards replaced the Leitch strategy (UK2). In Norway, a relatively early *Strategy for LLL in Norway* (NO1) from 2006 was succeeded only in 2017 with the more recent *Norwegian Strategy for Skills Policy* (NO2). In Germany, three strategic documents spanning a longer period and reflecting changes in national politics were chosen, starting with the *Strategy for Lifelong Learning in the Federal Republic of Germany* (DE1), followed by the *Advancement through education* (DE2) and the *National Skills strategy* (DE3). In Austria, where the *LLL:2020 Strategy* (AT1) was the only encompassing national strategy suiting the criteria, as a second case a strategy on regional level, the *Qualification Plan Vienna 2020* (AT2) was selected.

Key reference point for many of the selected strategies of the 2000s was the European Memorandum on Lifelong Learning (European Commission 2000), with its pivotal role in shaping education and skills policy across Europe (see Skills2Capabilities Case Study Report D2.1). It reflected a broader shift towards making lifelong learning a central element of European policy, as European countries faced significant challenges and opportunities around globalization, technological advancement, and demographic changes. The Memorandum aligned with the Lisbon Strategy (Council of Europe 2000), the European Union initiative aimed to make the EU the most competitive and dynamic knowledge-based economy by 2010. The memorandum encouraged member states to develop national lifelong learning strategies, which included reforming education systems, improving access to training for all age groups, and fostering collaboration among key stakeholders, including employers, social partners, and civil society. The European Union's recommended key competences for lifelong learning reflected a wider range of issues, including economic aims but also aims directed at social and human development, including for example "social and civic competences" and "cultural awareness and expression" (European Parliament and Council of the European Union, 2006). During the 2000s, European level policy followed the

outlined trend, as mirrored in the Education and Training 2010 strategic framework (European Commission 2001).

In the aftermath of the financial crisis from 2008, economies of the EU member states were under pressure. Austerity measures stood in conflict with necessary spending in education and skills development in the light of raising numbers of (youth) unemployment, while skill gaps widened and the focus in LLL policies shifted more towards economic goals (Volles 2016). These trends are also reflected in the orientation of some of the more recent strategies analysed, such as AT2, DE3 and NO2 where key terms like skills demand and supply have overshadowed lifelong learning, often focusing on reforming skill formation systems to match labour market demands and avoiding “skills mismatches”<sup>3</sup>. Many of such newer strategies have been implemented in the context of the OECD’s national skills strategy projects (OECD, 2019).

Figure 3.1 – Evolvement of analysed strategies over time



Source: Authors’ description

## 4 Analysing skills strategies across Europe

Across our case studies, several reoccurring benefits of pursuing a reform and further development of a country’s skill formation system via strategic policy documents could be identified. However, the extent to which these benefits

<sup>3</sup> Referring to a “gap between the aggregate supply and demand for skills, typically with reference to a specific geographical unit [...], and to the fact that observed matches between available workers and available jobs offered by firms [...] are sub-optimal” Brunello, G., & Wruuck, P. (2021). Skill shortages and skill mismatch: A review of the literature. *Journal of Economic Surveys*, 35(4), 1145-1167. .

can be achieved varies according to the strategies' main design characteristics. In the first part of this chapter, we summarize the main thematic focus of observed strategies and as well as their design characteristics, thereby introducing the concepts of “agenda setting strategies” and “blueprint strategies”, each with unique benefits and limitations. In the second part of this chapter, we identify the main benefits related to strategy implementation, showing how the overall skill formation of a country can profit from such a strategic approach to skills policies, and how individual policy instruments can benefit from being implemented as part of an overarching strategic policy document.

#### 4.1 Two types of strategic policy documents

As shown in the introduction, a *well-designed* strategic policy document is usually considered to be a document that aligns with the SMART criteria. Based on variations of a framework originally developed in business management (Doran, 1981; Drucker, 1977), strategic policy documents should consequently be *specific* in defining their main goals and actions, *measurable* by certain indicators to track progress, *assignable* to a specifically responsible stakeholder, *realistic* given available resources, and *time-related* (specifying when results are to be achieved).

Table 4.1 – Two types of skills strategies according to the documents' comprehensiveness

	<i>Type of strategic policy document</i>	
	<b>Blueprint strategies</b>	<b>Agenda-setting strategies</b>
<i>Goals</i>	Detailed, often narrowly defined	Broadly formulated, easily reinterpretable
<i>Targets on Key Performance Indicators (KPIs)</i>	Multiple targets defined, sometimes even at different levels (broader goals, policy measures)	Undefined, or only very limited number of targets/KPIs observed
<i>Actions/policy measures</i>	Detailed plan of actions to be implemented	Undefined, vague, or reference to ongoing actions

Source: Authors' description

In the remainder of this contribution, we term this type of skills strategy a “**blueprint strategy**”, as it concretely guides through multiple steps necessary to put the strategies into practice. Much like a blueprint for assembling a piece of furniture, this type of strategy specifies the ultimate goals to be achieved (i.e. the whole piece of furniture), the actions respectively policy measures necessary to reach it (i.e. which screws, nuts and bolts to use), and quantitative targets for specific key performance indicators (i.e. the intended dimensions). In summary, such blueprint strategies have very detailed and



often narrowly defined goals, multiple defined key performance indicators against which progress is tracked, as well as a detailed list of foreseen actions and policy measures to be implemented in order to achieve such progress.

Certainly, many strategic policy documents in the area of skills policies align – or at least clearly *aspire* to align - with these criteria. Among the selected strategies for this research, the following exemplify the blueprint model:

- In Austria, the *LLL:2020 Strategy (AT1)* not only presents its content through layers of strategic and topic-specific goals, along with more or less specific measures and indicators, but also provides overarching visions and principles, which contribute to a certain level of overcomplexity. The strategy covers learning over the whole lifespan starting with early childhood education to learning in the post-retirement phase and targets different policy areas including education and training, labour market, social affairs and economic policy.
- The second Austrian example, the *Qualification Plan Vienna 2020 (AT2)* is centred on strategic and quantitative goals, with very concrete measures and instruments aiming to increase the number of individuals with educational attainments beyond compulsory schooling with a focus on IVET, upskilling of adults and information and outreach.
- In Germany, the *Advancement through Education (DE2)* initiative meets the criteria of a blueprint strategy, with an ambitious number of action points across various fields, some of which are supported by quantitative targets. It was initiated by the new federal government in 2008 together with the Länder and lined out goals in a broad range of fields from strengthening VET to German language acquisition and cooperation in the federal system.
- Both Bulgarian LLL strategies also fall into this category, adopting a strategic approach that covers a broad range of educational fields with objectives tied to quantitative indicators. The *National Strategy for LLL 14-20 (BG2)* further defined specific activities for its goals, addressing a gap in its predecessor, the *National Strategy for LLL 08-13 (BG1)*. Both strategies address structural problems in the Bulgarian adult learning system to increase participation by adopting the EU concept of LLL and following up on European policies on skills and key competences.
- Finally, the *Leitch Review of Skills (UK1)*, commissioned by the British government, sets out objectives and indicators across multiple educational policy areas, complemented by a separate implementation plan published the year after the report. It promotes a

demand-led skill formation system following enterprises' needs while also further developing support for low-skilled.

However, many strategic policy documents on skills clearly do not seem to be designed with “SMART” principles in mind. Many of these strategies that defy SMART criteria are nonetheless considered to be quite successful by participant stakeholders, and consequently cannot be considered as outliers or exceptions to the rule. Our approach consequently considers these strategies as a different type of strategic policy document – with unique strengths and weaknesses compared to blueprint strategies.

We term these types of strategies **agenda-setting strategies** for the remainder of this contribution. The main rationale behind these strategies is less to provide a comprehensive blueprint for reaching the respective goals defined in the document. Rather, they aim at “effectively communicating a long-term vision”, and in this process, “facilitate networking, shape the framing of problems as well as solutions, and lead to policy learning” (Nordbeck/Steurer 2014). By communicating a common vision for the further development of a country’s skill formation system, they also provide policy makers with an agreed upon reference point to justify funding for future actions and/or continue policy instruments that could have otherwise been cancelled. In contrast to blueprint strategies, their overall goals are usually much more broadly formulated, allowing for comparatively high leeway in their interpretation. Key performance indicators to track progress towards these goals are usually not defined. Specific actions or policy measures to work towards the broader goals, are rarely included in the strategy document at all, or alternatively formulated in a very generic fashion, often including references to policy instruments that are already implemented or in the course of implementation. However, this does not necessarily mean that no specific policy measures may ultimately result from agenda-setting strategies. Also agenda-setting strategies may kickstart a process of formulating more specific actions scheduled for implementation, but rather as follow-up process to initial strategy formulation. Among the selected strategies for this research, the following exemplify the agenda-setting model:

- Both Norwegian strategic papers fit into the category. The *Strategy for LLL in Norway* (NO1) from 2006 was primarily drafted by the Ministry of Education and containing rather an analysis of the state of play with no concrete implementation plan. In contrast, the *2017 Norwegian Strategy for Skills Policy* (NO2) built on a broader stakeholder process to further develop an already strong adult learning system by deepening cooperation, however, also without any specifically defined policy instruments or quantitative goals. While the topics covered are

similar in both strategies, the first one showed less impact on policy making.

- In Germany, two of the three analysed policy documents are agenda setting strategies. The *Strategy for LLL in the FRG* (DE1) was a response to the EU policies on LLL broadly framing the topic and intentionally refraining from proposing specific measures to increase the consent among stakeholders. In the *National Skills strategy* (DE3) from 2019, the LLL concept was de-emphasised while the discourse of securing skilled labour became dominant. Commitment of stakeholders to the strategic goals was high and refinement of the policies was continuously made in the implementation process, however, with concrete measures only vaguely specified.
- For the UK, we characterise the *Skills and Sustainable Growth* white paper (UK2) as an agenda setting strategy. Published in the aftermath of the financial crisis and accompanying an economic policy of austerity, it focused funding (cutbacks) and directing more responsibility towards employers and individuals.

Empirically, the distinction between blueprint and agenda-setting strategies is blurry– in practice strategic policy documents or even specific sections included in them are often placed somewhere on a continuum between these two ideal-typical poles. On the face of it, blueprint strategies appear more ambitious, specifying a clear plan ranging from overall goals, through indicators capturing progress and the respective actions to necessary to reach them. However, as we will illustrate below, observed cases show that blueprint strategies are not necessarily more ‘successful’ in achieving policy change and triggering implementation of policy measures compared to agenda-setting strategies. Rather, each type of strategy shows unique benefits and drawbacks.

#### 4.2 Benefits and limitations of skills strategies

Across our case studies, several reoccurring benefits of pursuing a reform and further development of a country’s skill formation system via strategic policy documents could be identified. In this section, we summarize these main benefits related to strategy implementation, showing how the overall skill formation of a country can profit from such a strategic approach to skills policies, and how individual policy instruments can benefit from being implemented as part of an overarching strategic policy document. Broadly speaking, the main benefits of designing and implementing skills strategies observed in the case studies are connected to 1) building foundations for policy coordination and facilitating gradual change; 2) improving

complementarity between policy instruments; and 3) reinforcing policy priorities among governing stakeholders. However, some of these benefits are more easily achievable within the framework of blueprint strategies compared to agenda-setting strategies, and vice versa (see the table below for an overview).

Table 4.2 – Key benefits and limitations of the two types of skills strategies

	<b>Blueprint strategies</b>	<b>Agenda setting strategies</b>
<i>Improve policy coordination and facilitate gradual change</i>	<ul style="list-style-type: none"> <li>+ May establish long-term coordination channels between relevant actors</li> <li>+ supports specific reform initiatives in gaining traction</li> <li>- Necessitates a more demanding preparatory process</li> </ul>	<ul style="list-style-type: none"> <li>+ Creating a shared focus on key issues, fostering collaboration</li> <li>- May rely too heavily on voluntary ad-hoc coordination</li> </ul>
<i>Facilitate complementarity between policy instruments</i>	<ul style="list-style-type: none"> <li>+ Offers a well-defined set of instruments.</li> <li>+ Enhances coherence already during the preliminary negotiation phase.</li> <li>- Vaguely stated goals and instruments may impede effective implementation.</li> </ul>	<ul style="list-style-type: none"> <li>+/- Complementarity depends on availability of pre-existing coordination mechanisms</li> <li>- Lack of clearly outlined measures risks impeding progress</li> </ul>
<i>Reinforce policy priorities</i>	<ul style="list-style-type: none"> <li>+ May facilitate the continuation of existing instruments / introduction of newly foreseen instruments</li> <li>- A fixed set of instruments limits flexibility.</li> <li>- Failure of key instruments could jeopardize the overall success of the strategy.</li> </ul>	<ul style="list-style-type: none"> <li>+ Allows flexibility to select from and secure funding for a wide range of possible actions</li> </ul>

Source: Authors' description

#### 4.2.1 Building foundations for policy coordination and facilitating gradual change

Aligning with literature on strategic policy making, our case studies have confirmed that – to a varying extent – strategic policy documents were able to gradually strengthen coordination between the relevant stakeholders of the skill formation system. The mere process of mobilizing stakeholders in order to initiate and jointly draft a strategy can raise awareness of the need for collaboration across policy boundaries, facilitate the development of common understanding of the challenges faced, take stock of what works and what not, and aim to decide on mutually reinforcing actions to be taken in the

future. Newly built common communication channels can act as **mechanisms for coordination between relevant stakeholders** and steering bodies or councils might be established that can remain relevant even beyond the formal lifecycle of a strategic policy document. Therefore, these communication channels might also be used to **include new players** into the governance of skill formation systems.

However, for both blueprint as well as agenda-setting documents, the case studies have confirmed that “comprehensive policy integration cannot be achieved through a single multi-sectoral strategy” (Nordbeck and Steurer 2014), no matter how sophisticated its design. In none of the case studies, did the observed skills strategies lead to outright, disruptive changes of the overall skill formation systems. Usually, skills strategies were either limited in terms of far-reaching, large-scale reform ideas (as in Austria, Germany and Norway) or the subsequent implementation process remained limited and therefore could not cause such outright, transformative change (as in Bulgaria and England). These findings should certainly not negate the potential necessity of disruptive changes in certain political-economic contexts. But the findings suggest that strategic policy documents might be the wrong political tool to achieve large-scale, disruptive reforms, given existing barriers for implementation (see Chapter 5).

However, as shown in historical institutionalist literature, also initial smaller-scale changes (e.g. newly established channels of coordination and new policy instruments) have the potential to ultimately accumulate up to large-scale, transformative changes via a process of incremental, gradual institutional change (Mahoney & Thelen, 2010; Streeck & Thelen, 2005). Even though it appears rather unlikely that such gradual but transformative change can be achieved within the lifecycle of one single strategic policy document, the case studies have illustrated that strategic policy documents can nonetheless contribute to transformative, large-scale changes by triggering a process whereby “successful integration can [...] come about piecemeal over time as successive layering approximates a new policy regime” (Rayner & Howlett, 2009b). For example, the case studies on Bulgaria conclude that Bulgaria’s lifelong learning strategies successfully created a common space for discussion among all of the relevant stakeholders and institutions in the countries’ skill formation system. The institutionalisation of such a coordinating mechanism is seen as one of the primary accomplishments of both lifelong learning strategies. Furthermore, the case study suggests that these new forms of coordination may lay the foundation for including new stakeholders into the governance of Bulgaria’s skill formation system, in

particular strengthening the role of employers in order to work towards increasing collectively provided training solutions.

Also in Norway, the 2017 strategy document is regarded as successful in particular due to the coordination process that was necessary for developing it. It was seen as essential to involve all actors in skills policy to achieve a joint understanding of challenges, set common objectives and coordinate action. It therefore not only reinforced existing communication channels (e.g. among social partners within a certain educational sector) but aimed to achieve improved coordination across multiple educational types and levels. Furthermore, it also aimed to involve a wider range of stakeholders perceived as relevant for the governance of the skill formation system, in particular regional level representatives (the responsibilities of which have been expanded within recent reforms), NGOs active in adult learning provision as well as public administration of welfare services.

Laying the groundwork for coordination can also **facilitate processes related to the introduction of new instruments and prevent reform-deadlocks**, as the case studies on Austria shows. It argues that the “LLL:2020 strategy has been most effective in the years prior to its adoption”, with the preparation process raising awareness of the need for collaboration across and triggering a process of stock taking and subsequent policy innovation that elicited novel initiatives. Even though the strategy lost most of its formative power later in its life cycle, substantial progress could be achieved via several of its implemented policy measures, for example the implementation of “*Level UP – Adult Education*” (formerly known as the Initiative for Adult Education until 2023). The initiative profited from being developed and implemented alongside the preparatory work and later the coordinative framework of the LLL:2020 strategy, which brought together the relevant stakeholders for its implementation, facilitating smooth knowledge transfer and providing common overarching goals for the design of the instrument: adult (basic) education as a means for personal development, social integration, and empowerment on top of economic and labour market effects.

*Box 4.1 – Austria: Level Up – Adult Education, 2011–present*

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 initiative ‘*Level Up – Adult Education*’ (until 2023 known as the ‘Initiative for Adult Education’) 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 in 2011, *Level Up* quickly emerged as a flagship initiative within the LLL:2020 strategy, with consistent progress reported. Even beyond the strategy’s end date, the *Level Up* initiative 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.

Under the *Level Up* framework, all Austrian residents older than 15 years have access to two types of educational programmes: literacy and basic skills courses, and preparatory courses for obtaining a school-leaving certificate (compulsory schooling, ISCED 02). All courses are free of charge for participants, made possible by a co-funding agreement between the federal state and the regional governments and co-financed by the ESF. The *Level Up* initiative 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 by making use of a legal agreement (*§15a Vereinbarung*) between the federal and Länder governments to (partly) overcome the central government's limited legal authority over adult education. It also established joint quality standards and provided impetus for the professionalization of educators in the field (Günter Hefler et al., 2018).

Source: Skills2Capabilities D2.2 – Report on country case studies on skills programmes

Similarly, the Qualification Plan Vienna substantially smoothed the implementation of later follow-up instruments. The swift implementation of the “Vienna Weeks” was made possible by prior groundwork achieved under the coordinative framework of the strategic policy document and built on long-existing regional cooperation. By being incorporated into the strategic document, long-term commitment from partners was secured, leveraging the specific policy landscape at that time. (See Box 3.4)

Both *agenda-setting strategies* (only formulating some broad, overarching goals without much detail on specific actions) and *blueprint strategies* (with detailed and often narrowly defined goals, detailed lists of foreseen actions and policy measures) can lay the groundwork for coordination for collaboration and establish communication channels between the relevant stakeholders. However, formulating well-designed *blueprint strategies* not only involves the formulation of broader overarching goals, but *necessitates* some basic consensus about how such goals can be achieved. While addressing these “trade-offs between pillars (or sectors) [...], levels of government, different stakeholders [...] is anything but trivial” (Steurer/Nordbeck 2015), early coordination between stakeholders within the framework of a blueprint strategy can prevent later reform deadlocks in the implementation of a certain skills strategy, and substantially swiften up the introduction of foreseen policy measures.

As a contrasting example, in England, the *Skills for Sustainable Growth Strategy* proposed the broader concept of strengthening co-investments in skills (e.g. sharing costs paying for training among employers, individuals and the state). The document set out only broad goals of the proposed approach,

without direct involvement of stakeholders outside the responsible ministry. However, follow-up measures for implementation in part directly depended on cooperation of such stakeholder groups. In turn, some of the measures never materialized, or only with substantial delay. For example, the possibility of introducing sectoral training levies was vaguely proposed, but would have necessitated cooperation with employer representatives. A levy was introduced only seven years after launch of the strategy, and with a substantially different (national-level) design than originally foreseen.

*Box 4.2 – England: Co-investment in skills, 2010–present*

Since 2010, England’s skills policy has incorporated *co-investment*, requiring financial contributions from the state, employers, and learners to support vocational education. This approach, introduced to mitigate funding cuts in further education after the financial crash, aligns with broader UK austerity policy. The *Skills for Sustainable Growth* policy formalized co-investment by specifying that vocational training costs should be shared among beneficiaries, relying on co-funding by individuals (via loans) and employers (via a training levy). This structure was intended to make the system more demand-driven and encourage non-governmental funding in skills training. Students over age 24 could apply for training loans for level 3 and higher courses, repayable only when earning above a defined income threshold. However, uptake of these loans has been limited.

A training levy was introduced in 2017, seven years after launch of the strategy document. The levy requires employers with a payroll over £3 million to contribute 0.5% of their pay bill. Levy payments can be reclaimed by employers to cover apprenticeship training costs, but unclaimed funds accumulate, suggesting that employers are not fully utilizing their contributions. The levy has also shifted the profile of apprenticeships: more training now occurs at higher levels (ISCED levels 5+), and there is a noticeable decline in younger apprenticeships at levels 2 and 3.

While co-investment aims to create a more responsive, fair skills system, its effectiveness remains mixed.

Source: Skills2Capabilities D2.2 – Report on country case studies on skills programmes

#### 4.2.2 Improving complementarity between policy instruments

The case studies have suggested that strategic policy documents can facilitate the coherence of different policy instruments within a countries’ overall skill formation system. Within a given country, multiple ministries and agencies located in different policy fields (e.g. education policy, employment policy, economic policy) might have their own specific policy instruments in the area of skills policies, with this split of responsibilities potentially contributing to gaps in provision or overlaps of support (OECD, 2020). By bringing together this multitude of stakeholders in the process of setting up strategic policy documents, actors can mutually adjust and enhance complementarity of their respective policy instruments in the subsequent implementation processes of the skills strategy, with instruments delivering



better results by mutually reinforcing each other in working towards common goals and avoiding duplications of efforts.

For example, in Bulgaria, the inclusion of the “Adult Learning Literacy Programme” in the *National Strategy for Lifelong Learning (2008-2013, 2014-2020)* enabled coordinated reforms across interconnected sectors of the adult learning system, which led to further developments in the underlying legal framework. More specifically, this included enhancing the legal framework for legitimising literacy, certifying learning outcomes, and validating non-formal and informal learning. Additionally, it facilitated the introduction of the follow-up initiative “Training of adults undergoing literacy courses”, aimed at increasing the employment prospects of unemployed individuals who successfully completed literacy courses and met the educational requirements for entry into vocational training, with particular focus on youth. Similarly, the Bulgarian “Career Start” programme (see further below) strongly benefitted from complementary information campaigns and outreach activities towards individual beneficiaries and employers, conducted jointly by the Ministry of Education, the Employment Agency and its territorial divisions as well as the regional and municipal administrations.

*Box 4.3 – Bulgaria: Adult Literacy Programme: New Chance for Success, 2011–2020*

The *Adult Literacy Programme: New Chance for Success (2011–2020)* was launched in Bulgaria to support lifelong learning, specifically targeting literacy improvement among adults with low educational attainment. Originally initiated under the National Strategy for Lifelong Learning (NSLLL) 2008–2013 and continued in the 2014–2020 framework, the programme aimed to address Bulgaria’s high percentage of adults with limited education, particularly among low-income and marginalized groups, including ethnic minorities. This approach aligned closely with national objectives for economic empowerment and social inclusion.

The programme, funded by the European Social Fund and Bulgarian national resources, operated at a national scale, fostering cooperation among various government agencies and EU initiatives to create a cohesive educational policy framework. Over time, it expanded to incorporate psychological support, motivation-building, and the validation of informal and non-formal learning, enabling participants to gain recognized certifications that improved their employability.

The programme’s legacy shows promise for sustained impact, demonstrated by legislative changes such as amendments to the Pre-school and School Education Act, which now formally recognize programme certifications in adult education. However, to ensure its long-term continuity and reach, issues like inter-institutional coordination and logistical barriers (e.g., school transport and childcare) must still be addressed.

As a core component of Bulgaria’s NSLLL, the *Adult Literacy Programme* exemplifies the policy’s commitment to an inclusive, skills-focused educational framework. It underscores the role of lifelong learning in fostering social and economic transformation, while also highlighting areas for improvement, such as the need for more robust evaluation mechanisms and enhanced institutional coordination.

Source: Skills2Capabilities D2.2 – Report on country case studies on skills programmes

In Austria, the beforementioned “Vienna Weeks” were designed as an instrument to implement the objectives of the Vienna Qualification Plan 2020. One of the main success factors of the Vienna Weeks framework is its complementarity with other regional and local activities of the Vienna Employment Promotion Fund and the participating partner organisations. 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.

*Box 4.4 – Austria: Vienna Weeks for Lifelong Guidance and Further Education, 2015–present*

The *Vienna Weeks for Lifelong Guidance and Further Education* (“Vienna Weeks”) is a large-scale annual outreach initiative established in 2015 and coordinated by the Vienna Employment Promotion Fund (waff). Running through 2024 with plans for future expansion, this initiative aims to enhance educational access and encourage career development among Vienna's diverse populations, particularly targeting groups with limited educational attainment or facing social barriers. It is anchored in the goals set forth by the Vienna Qualification Plan 2020 and later reaffirmed in the Vienna Qualification Plan 2030 as a vital tool to boost motivation for education and raise awareness of learning opportunities.

The Vienna Weeks were conceived in response to a need for more than just funding and accessible training; they sought to actively inform residents about their options and provide support for overcoming obstacles to further education. By fostering a supportive environment, the initiative highlights the personal benefits of continued education and offers a wide-ranging network of guidance services, increasing awareness and integration of existing resources. To reach this audience, Vienna Weeks leverages a diverse set of activities: each year, it features approximately 100 events held during designated spring and autumn weeks, attracting 4,000 to 5,000 attendees. These activities range from intimate workshops to large public gatherings and are facilitated by a network of over 20 partner organisations, including schools, community centres, health providers, migrant support groups, and women’s organisations.

The initiative was initially co-funded by the European Social Fund and the City of Vienna via waff resources, with waff assuming full funding responsibility since 2023. Partner organisations also contribute by financing specific activities within the framework. A key success factor of the Vienna Weeks is its coherence with other local initiatives, which ensures a seamless integration with Vienna’s broader employment and educational policies. By aligning with existing outreach efforts and partnerships, the Vienna Weeks not only benefited from pre-established relationships and networks but also provided a structured, long-term commitment to lifelong learning for Vienna’s residents.

Source: Skills2Capabilities D2.2 – Report on country case studies on skills programmes

The cases of Bulgaria and Austria suggest that *blueprint strategies* may be better able to prepare the design and implementation of policy instruments in

a complementary way, compared to agenda-setting strategies, as they conceive (sets of) well-specified instruments that follow-up on the jointly established goals already during strategy design – and not as a mere follow-up process that might be subject to renewed contestation by involved stakeholders. For example, in Norway, complementarity between policy instruments could only be achieved in policy areas where coordination between the responsible actors was already high before the launch of the strategy – namely among social partners. One of the main follow-up measures to the *Norwegian Strategy for Skills Policy* were “*Tripartite industrial programmes for skills development*” for which social partners fulfil main governance tasks. They are part of a wider set of complementary policy programmes introduced in the context of the strategy that aimed at developing more relevant skills development for work life, with tripartite programmes focusing on VET (colleges), and funding programmes for flexible and decentralized education targeting the HE sector (universities and university colleges).

*Box 4.5 – Norway: Tripartite industrial programmes for skills development, 2019–present*

The *tripartite industrial programmes* for skills development in Norway, introduced under the Solberg government at the same time as the *Norwegian Strategy for Skills Policy* (2017-2021), focus on collaboration between government, employers, and employee organisations to address skill needs within transitioning industries. These programmes provide targeted national funding for vocational skills training, aimed at helping workers, including the unemployed and those laid-off, acquire new competencies to adapt to industry changes. Key industries initially included municipal health and social care, industry/manufacturing, and construction, with course offerings primarily in vocational colleges. Launched in 2019, the programmes expanded significantly in response to COVID-19, growing from two to ten initiatives, shifting from a demand-led model to a more supply-driven approach. Since 2022, education institutions apply for programme funding based on priorities set by sectoral boards and the Directorate for Higher Education and Skills, and the scheme was scaled down to five programmes in 2024, which will continue until 2027.

An evaluation covering 2019–2021 indicates that these programmes effectively reached underrepresented workers in training, validating the value of the tripartite model. Although not directly listed in the strategy’s priorities, the tripartite model aligns with its collaborative policy aims, allowing national-level strategies to influence localized decisions through relevant, targeted training developed by industry stakeholders. This approach was particularly effective in addressing immediate needs during the pandemic. However, challenges remain in sectors with lower levels of organisation among both employers and employees, making it difficult to accurately assess skill needs or reach workers, particularly those in low-skilled roles.

Source: Skills2Capabilities D2.2 – Report on country case studies on skills programmes

However, the “right and duty for refugees to participate in career guidance”, also implemented in the context of the strategy, does not seem to

complement other schemes well. While the county administration is responsible for career guidance, the municipalities are responsible for organising the “integration programme” (a training programme for newly arrived immigrants). 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 actors responsible for the “introduction programme” training, was at times hard to establish. Sub-national actors are only peripherally involved in the Norwegian Strategy for Skills Policy and its respective governance structures.

*Box 4.6 – Norway: Career guidance as a duty and a right for refugees and immigrants, 2021–present*

In Norway, the “right and duty for newly arrived refugees and immigrants to participate in career guidance” is related to the Norwegian Strategy for Skills Policy 2017-2021 and supported by the Integration Act. Counties have to offer free career guidance to all inhabitants since 2020, and guidance was made mandatory for newly arrived refugees in 2021. Managed by regional career centres, in partnership with the Labour and Welfare Administration (NAV), these sessions last about 1.5 hours and are usually held in person. The career guidance for the target group is financed through the career centres’ ordinary budget, allocated through the counties’ budget, with some extra grants available. The guidance process aims to inform choices related to education and employment, and better tailor the “introduction programme” for newly arrived refugees and immigrants to individual goals to ensure smooth entry into the labour market. The introduction programme is a training programme intended to prepare refugees and immigrants for transition to work or education in Norway. 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.

An evaluation (Flatø et al., 2023) showed that this support system effectively reaches the target group, providing valuable information on Norwegian career pathways and aiding smoother transitions into work or further education. However, it highlighted challenges in cooperation between county career centres and municipalities responsible for the introduction programme, where differences in approach sometimes hinder alignment. Municipal introduction programme counsellors focused on broader integration goals, often prioritise quick employment outcomes over long-term career planning, personal development and individualised approaches. Timing emerged as another critical issue: municipal actors suggested that career planning may be premature for refugees dealing with immediate resettlement challenges, and a more phased approach would be beneficial. They also noted that increased familiarity with Norwegian systems would enhance the relevance of career guidance.

Source: Skills2Capabilities D2.2 – Report on country case studies on skills programmes

### 4.2.3 Reinforcing policy priorities

Evidence from the case studies indicates that skills strategies might serve as reference points that can help involved stakeholders to push forwards reforms of the skill formation system, reinforcing the policies set in the strategic policy documents. For example, skills strategies can “shape the framing of problems

as well as solutions” (Casado-Asensio & Steurer, 2014), providing stakeholders from the field of skills policies justifications for the introduction and/or funding of specific policy instruments vis-à-vis decision-makers opposing or largely indifferent towards the specific initiative. Furthermore, while it may be true that skills strategies sometimes follow a “political logic that coopts policies that would have been formulated anyway” (Nordbeck & Steurer, 2015), they can at the same time foster the stability of policy instruments already introduced and help political- as well as administrative-level stakeholders secure funding for existing policy instruments that align with given overall policy priorities.

For example, in the case of Norway, the *National Strategy for Skills Policy* facilitated the integration of skills policies into other policy fields, most importantly migration and integration policy. It served as an important driver for the embeddedness of career guidance in the *Integration Act* of 2021, which introduced the right and duty for refugees to participate in career guidance (see further above). In Bulgaria, the *National Strategies for Lifelong Learning* acted as a common reference point in which policy instruments are normatively justified and financially secured upon the commitment of all relevant stakeholders (state institutions, NGOs, employers, trade unions). The “Career Start” programme already existed since 2002 and therefore predated both the *National Strategies for Lifelong Learning 2008–2013* and *2014–2020*. However, it has nonetheless been included in and further developed under the second strategy, thereby increasing its visibility and affirming its necessity.

*Box 4.7 – Bulgaria: Career Start, 2002–present*

The “Career Start” programme has been part of Bulgaria’s Active Labour Market Policy (ALMP) since 2002. It aims to support young graduates’ transition from education to employment by providing work experience, primarily in the public sector. The first Bulgarian LLL Strategy did not highlight graduate employability as a major issue. However, with increasing mismatches between graduates’ qualifications and their roles in the labour market, the second LLL Strategy 2014–2020 recognized this as a significant concern and integrated it into its implementation plan.

The programme is targeted at unemployed youth under 29 with higher education and no work experience in their field, offering them 9-12 months of employment, funded by the national budget, thereby combining on-the-job training and subsidized employment. Its goals include preventing youth disqualification, combatting “brain drain,” renewing public institutions, and encouraging flexible, market-aligned skill development.

The programme aligns with broader youth employment policies, showing the highest gross effect among ALMP initiatives in the country and its inclusion in the National Strategy for Lifelong Learning (NSLLL) 2014–2020 has further increased its visibility and impact. Evaluations have shown that the programme can be regarded as highly successful, facilitating inclusion in the labour market and avoiding the risk of mismatch

between one's work and education, positively influencing self-esteem and job satisfaction among participants. However, challenges include a low transition to permanent employment after programme completion, low wages, and limited awareness, which has led to a drop in participation. Despite these issues, "Career Start" is considered highly sustainable and remains a key youth employment initiative in Bulgaria.

Source: Skills2Capabilities D2.2 – Report on country case studies on skills programmes

Similarly, in Germany, the “Bildungsprämie” (providing co-funding of continuing education via grants for individuals) was introduced in 2008 as one key measure of the *Advancement through Education Strategy* (2008), and was subsequently included again in the *National Skills Strategy* (2019). The case studies suggest that the integration of the “Bildungsprämie” in the national strategies increased its visibility and access to funding. While it was ultimately abolished in 2021 following a critical assessment by the German Federal Court of Auditors regarding the scheme's efficiency (high administrative costs) and limited effectiveness, a successor instrument („Lebens-Chancen BAFöG“) was included in the revised *Skills Strategy* (2022).

*Box 4.8 – Germany: Bildungsprämie, 2008–2021*

The *Bildungsprämie* (Continuing Education Grant) program ran from 2008 to 2021, funded by Germany's Federal Ministry of Education and Research (BMBF) and the European Social Fund (ESF). It was introduced by the *Advancement through Education Strategy*, and was subsequently included again in the *National Skills Strategy* (2019). Aimed at promoting continuing education among low-income individuals (below taxable €20,000), the programme addressed significant financial barriers to professional development in Germany, where participation in CVET lags internationally. Integrating the *Bildungsprämie* into broader lifelong learning strategies and EU funding frameworks boosted visibility and support.

The *Bildungsprämie* provided two key financial instruments: a grant (50% personal contribution, maximum funding amount €500, validity six months) and a savings voucher allowing early use of savings for education. The grant was the main instrument, while the savings voucher saw limited uptake due to low awareness and limited applicability. The program required participants to attend a counselling session to ensure effective use of funds. It successfully mobilized a specific target group, primarily women, part-time employees, and those with intermediate educational backgrounds, although it faced challenges in reaching low-skilled workers.

Evaluations showed positive short-term impacts on participation rates, as funded individuals engaged in continuing education more frequently than others. Participants reported benefits like improved skill sets, better task handling, and social networking opportunities. Measurable professional outcomes—such as salary increases, job promotions, or self-employment—were less consistent, indicating that the program mainly supported personal and skill development rather than significant career advancement. Despite rising administrative costs, the program was deemed cost-

effective in evaluations due to its social and professional benefits, with over 405,000 vouchers issued. However, the scheme has been discontinued in 2021, following critical assessments by the German Federal Court of Auditors regarding the scheme's efficiency (high administrative costs) and limited effectiveness.

Source: Skills2Capabilities D2.2 – Report on country case studies on skills programmes

Also the “ValiKom” project (2015) that piloted approaches for the validation of non-formal and informal competences was included in the *National Skills Strategy*, and its transformation into a fully-fledged legal framework for validation was foreseen in the revised Skills Strategy in (2022) and finally implemented in 2024.

Box 4.9 – Germany: ValiKom, 2015–present

The *ValiKom* initiative (Validation of non-formally and informally acquired competences), launched in 2015 by Germany's Federal Ministry of Education and Research (BMBF) alongside industry and crafts associations, aims to establish a comprehensive validation process that recognizes and certifies non-formally and informally acquired professional skills to address skills shortages. A follow-up project, *ValiKom -Transfer*, ran from 2018 to October 2024. Based on the EU Council's 2012 recommendation on validating informal learning [and as a key measure promoted by the National Skills Strategy], *ValiKom* provides a standardized process that enables adults with work experience but no formal qualifications to certify their professional competences. This process, managed by a network of 32 centres representing 47 vocations, allows participants to compare their skills to formal vocational standards, strengthening both their career options and self-confidence. The validation procedure is free of charge addressing individuals aged 25 or older without formal qualifications but with relevant job experience.

Participants begin by documenting their skills in consultation with vocational experts, who then assess these skills through practical tests and interviews. Successful candidates receive a certificate affirming the equivalence of their competencies to a given profession. The *ValiKom* approach focuses on fostering participants' professional mobility, while employers gain more qualified staff to address skill shortages and increase efficiency. Impact assessments have shown that *ValiKom* participants benefit in both personal and professional growth. Survey data from 2018 to 2023 indicated that the programme positively affected career motivation, skill development, and overall employment satisfaction for 2,336 validated participants. However, experts recommend further integration of the *ValiKom* system into Germany's vocational training framework, along with broader recognition of the certificates, to maximize its impact on the labor market.

Source: Skills2Capabilities D2.2 – Report on country case studies on skills programmes

Both agenda-setting as well as blueprint strategies seem to be well suited to realize these “communicative” benefits of strategic policy documents, albeit with variations. The case of Germany suggests that agenda-setting strategies (as the *National Skills Strategy*) offer more leeway, enabling political- and administrative level stakeholders to choose from a broader range of potential policy measure to follow up on the defined high-level goals. In contrast, the

communicative benefits of blueprint documents are often limited to the range of specifically defined policy instruments designed to follow up on the broader goals of the strategic policy document. As emphasised by Casado-Asensio and Steurer (2014), blueprint strategies cannot realize “their full communicative potential, [...] because coordination was regarded as their core function”. If the defined instruments become – for whatever reason – contested in the implementation process, the whole strategic policy document might easily be compromised and replaced.

For example, in England, the Leitch Implementation Plan relied heavily upon the “*Train to Gain*” training advice and subsidies programme for employers. However, backed by a critical evaluation, the programme was abolished by an incoming government deciding that the money could be better spent elsewhere.

*Box 4.10 – UK: Train to Gain, 2006–2010*

The UK’s *Train to Gain* (TtG) initiative, active from 2006 to 2010, was established in response to findings from the 2006 Leitch Review, which highlighted the UK’s low skill levels as a barrier to economic growth. Leitch recommended a more demand-led training approach to address this skills gap. TtG was designed to engage employers in workforce upskilling by providing a brokerage service to assess training needs and connect firms with training providers. The programme, backed by around €2.25 billion, offered flexible, workplace-based training for employees over age 25 without an ISCED Level 2 qualification, aiming to improve skill levels through government-funded training grants.

Evaluations revealed that TtG successfully expanded access to training, with 1.4 million people starting courses and 554,100 obtaining qualifications. Employers reported improvements in job-related skills and organizational performance, with around half contributing to training costs. The brokerage model was particularly effective in reaching employers new to training. However, the program faced challenges, with mixed performance among training providers and high per-learner and per-employer engagement costs. Additionally, approximately half of the employers would have arranged similar training independently, raising questions about the program’s added value. Cost-control issues led to both under- and overspending during its tenure.

Despite its successes, TtG was discontinued in 2010 after the defeat of the labour government, justified largely by budgetary concerns following the financial crisis and a shift in policy by the new conservative government towards cost-sharing with beneficiaries. TtG’s innovative approach to employer engagement set a precedent, highlighting both the potential and limitations of demand-led training initiatives. While TtG addressed immediate skill gaps, similar challenges remain for future upskilling programmes, especially in a rapidly evolving labour market.

Source: Skills2Capabilities D2.2 – Report on country case studies on skills programmes



## 5 Exploring barriers for implementation

During their foreseen lifecycle, strategic policy documents can encounter a wide range of different barriers which prevent abovementioned benefits from being realized. In the following, we put under scrutiny what we consider to be the main barriers of a strategies' success. We focus on illustrating barriers for implementation in the context of cases where they showed the largest disruptive potential - even though many of these barriers were encountered in all of our observed cases. Among barriers for implementation, we can distinguish between factors external to the respective strategy process and factors internal to the strategy process.

Table 5.1 – Overview of identified external and internal barriers limiting strategies' success

External barriers	Internal barriers
Changes in the political environment, especially government changes introducing new priorities	Misalignment between goals, measures and indicators of a strategy
Disruptive socio-economic events or developments (e.g. financial crisis, pandemic)	Incoherence between strategic goals and policy context (e.g. institutional environment)
Restriction in decision-making through complex rules of multi-level governance	Lack of dedicated funding for implementation
	Unclear or missing assignment of responsibilities among involved stakeholders

### 5.1 External barriers

Concerning external factors, **government changes** are the elephant in the room, but nonetheless surprisingly rarely considered in the broader literature on strategic policy documents. Strategic policy documents are comprised of long-term (i.e. *strategic*) plans for the further development of skill formation systems that stretch across electoral cycles. At the same time, every strategic policy document can lose its formative power as soon as it stops to align with government priorities. From a partisan politics perspective, government changes can lead to situations where the set overarching goals and specifically formulated policy measures do not align anymore with the party positions of those newly in power. For example, an explicit focus or even the main overarching goal of many skills strategies can be to strengthen the orientation of education and training investments according to the immediate needs of labour markets, and more specifically businesses. The main rationale here is to avoid “skills mismatches” by meeting the demands of firms that face an insufficient supply of candidates with skills they deem suitable (Cedefop, 2010) (OECD, 2019). Partly, skills strategies are also attentive to the role skills and learning might play for social, personal and human development goals - beyond narrowly defined economic goals (see Report D2.1 for an overview across case study countries). This can include aspects of

skills policies relevant for social inclusiveness (with special attention to particularly disadvantaged social groups), democratic participation, and individuals' overall well-being. Evidently economic and social respectively human and personal development goals in part overlap<sup>4</sup>, however parties of the political left often prioritize social, personal and human development goals, while parties with economically right-wing positions usually prioritize economic efficiency (Busemeyer, 2015; Carstensen et al., 2021; Carstensen & Ibsen, 2021).

The case of England well illustrates the disruptive potential of government changes. Even though a “demand-led” skill formation system that follows the needs of the economy was seen as favourable across the political landscape, the Leitch Implementation Plan (2007) under the Labour government laid more emphasis on the large proportion of low skilled people. Specific quantitative targets and actions were defined and substantial public investments foreseen. However, after a change to a conservative-led government in 2010, overall public investments on skills were substantially cut and policy measures such as Train to Gain which were to play a prominent role in delivering the ambition set out in Leitch were cancelled. The subsequent Skills for Sustainable Growth Strategy (2010) largely made the Leitch Implementation Plan redundant. It relied on employers and trainees to increasingly fund (via co-investment) with the market playing a much more prominent role in determining the provision of training. In the case of apprenticeships, this seems to have led to provision increasingly being at higher levels (ISCED 5+). This leaves something of a gap vis-à-vis the provision of high quality vocational training to those making the transition from education into work. Similarly, in Austria, the LLL:2020 strategy (2001) launched under a coalition government between social democrats and conservatives has largely drifted into insignificance in the later years of its lifecycle, in particular after a change in government (2017) to a right-wing coalition that completely omitted lifelong learning in their government programme.

However, differences in party positions do not even need to be the main underlying reason preventing a strategy from remaining relevant across changing governments, but rather differences in prioritization of policy areas. Even if a strategy aligns with the policy preferences of a newly elected government, it may be ignored and faded out simply due to a lack of high-level political will and the prioritization of other policy areas at the cost of skills

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<sup>4</sup> Orienting education and training systems alongside economic goals and immediate labor market needs might certainly help to improve individuals' capabilities for achieving the functioning of a well-paid job, contributing also to social goals.

policies. As the case of Bulgaria's National Strategies for Lifelong Learning (2008-2013, 2014-2020) has shown, implementation of the strategies was heavily influenced by political rifts and changes (related to changes of ministries and restructuring of administrative units) and, if there was insufficient institutional capacity, strongly dependent on the commitment of specific persons in the respective state institutions.

The implementation of skills strategies can also be impeded by **socio-economic shocks** – for example economic crises, new disruptive technologies, rapidly increasing numbers of refugees, or the economic and social consequences of a global pandemic. Historical institutionalist literature has long highlighted the importance of structural shocks in triggering policy-change (Hall & Thelen, 2009). Even though such external shocks might not necessarily dictate the specific direction of policy-change (Emmenegger et al., 2012), together with intervening factors (as aforementioned government changes), they can easily disrupt the implementation of a certain strategic policy document. For example, in England, the Leitch Review was published in 2006 and the financial crisis started in 2007. From 2010 onwards substantial cuts to government expenditure, notably in relation to further education and skills respectively measures connected to the Leitch Implementation Plan, were justified with reference to the need to reduce levels of government borrowing following the government's bail out of the banking system. While it is difficult to disentangle the effects of austerity on the skill system from the wider changes the government considered necessary, it almost certainly increased the imperative with which change needed to be introduced.

Furthermore, as already highlighted by Rayner and Howlett (2009a), the implementation of skills strategies can be impeded by the high **complexities arising in multi-level systems of government** “with relatively fixed jurisdictional limits divided between levels of government”. In federal states as Austria and Germany, substantial responsibilities for certain policy areas in the overall skills system are allocated to federated states or even lower levels of government. Aligning with veto player literature, the institutional environments of these countries can complicate the implementation of a skills strategy due to a high number of potential veto points that can be used to block the introduction of new policy measures (Immergut, 1990; Tsebelis, 2002). Implementing the respective changes proposed in the strategic policy document might therefore necessitate not only absolute majorities in parliament, but even “super-majorities” (i.e. two-thirds of all votes) and/or majorities among federated states. For example, while in certain areas the Austrian LLL:2020 strategy could successfully coordinate among national-

level decision-makers and the federated states (e.g. the Initiative for Adult Education), multiple foreseen actions touching the responsibilities of the federated states could not be implemented until today (e.g. harmonization of regulations for demand-side incentives for adult learning, new federal framework legislation on preschool education, etc.). Similarly, implementation of the German “Advancement through education” strategy (2008) was dependent on agreement in the national parliament (*Bundestag*) as well as within the federal council (*Bundesrat*, representing the sixteen federated states), as it touched the responsibilities of the German *Länder*.

## 5.2 Internal barriers

There are also manifold factors internal to the respective processes of designing and implementing skills strategies that might impede their success. The most regularly encountered internal barrier in the observed countries as well as the broader literature on strategic policy documents is a **misalignment between the strategies’ goals, indicators and foreseen actions**. In other words, the specifically chosen key performance indicators can be unsuited to track progress towards the overarching goals and “float in an empty space” (Rüegge et al., 2011), and/or the specific policy measures proposed can be unsuited to deliver the results necessary to achieve the foreseen goals respectively the quantitative targets set. Furthermore, the specific monitoring process of key performance indicators might also be “detached from the strategy as a policy document and as a governance and implementation process”, only addressing smaller circles of experts and lower-level public administrators without decision-making power (Nordbeck & Steurer, 2015).

These shortcomings can in particular be observed in the case of Bulgaria’s National Strategies for Lifelong Learning for the Period 2014-2020. The respectively chosen indicators were very broad, progress towards which – for example the employment rate of persons aged between 20 and 64 – depends on a multitude of factors some of which are beyond the reach of skills policies. More specifically, many of the quantitative targets (tracked in the general population) and the overarching goals defined could hardly be considered as realistic, given the proposed policy measures and the framework conditions in the country: poor economic performance, a lack of job opportunities, low salaries and other social-economic characteristics. As targets against the misaligned indicators could not be reached, progress in Bulgaria’s lifelong learning system was also understated: as the case study shows, several policy measures have been introduced as part of the implementation process, however, could not realistically be expected to achieve set goals.

Similarly, in Austria’s LLL:2020 strategy, the numerous statistical benchmarks foreseen in the strategy could give a realistic impression of progress in the

policy field only to a limited extent. Of the ten indicators, only three appeared to be well suited to measure progress in the intended way, five only conditionally suited and two not suited. In other words, monitoring did not provide a sufficiently informative overall picture of the progress achieved, and also was not used for further decision-making. Foreseen policy measures were only suited to address some of the overarching goals of the strategy, while other overarching goals remained mere rhetoric. This is true for broad goals, such as increasing equal opportunities in the Austrian education system, which cannot easily be tied to specific measures. However, the same issue was found in sub-fields, such as the action line, where the goal of making workplace learning an integrated part of business culture was mentioned but not linked to any concrete measures.

And in England, the Leitch Implementation Plan (2007) defined a large range of detailed actions and indicators to follow up upon its broader goals of achieving a demand-led skill formation system. However, although Leitch called for the skills system to be more demand-led, many of the recommendations, subsequently implemented by government, were supply-side ones (e.g. targets for the number of people to have obtained a qualification). Indicators or targets capturing the demand-side were largely absent. The targets were subsequently dropped by the incoming government in 2010. Whether this was because the targets proved difficult to achieve or because they were considered a distraction from the main goals of policy, is moot.

Another type of **misalignment might emerge between a particular strategies' goals and actions, and the specific country context**. Skills strategies are often used to achieve a “policy transfer” of “best-practice” skills policies considered as particularly successful in one context or country (e.g. dual apprenticeship training) to another (Barabasch et al., 2021). However, the functioning of these policies is often dependent on inherently complex institutional conditions that have developed gradually over the course of decades or even centuries. Policies not adapted to the institutional environments of the respective countries therefore easily fail due to “unsuitable or unforeseen framework conditions” (Li & Pilz, 2023). In the case of Bulgaria’s National Strategies for Lifelong Learning (2008-2013, 2014-2020), Bulgarian legislators have most often adopted an approach of copying and direct application from EU recommendations, without sufficiently considering specificities of the Bulgarian education system and a preliminary analysis of the particular national let alone regional problems and challenges to be solved for successful implementation.

Finally, other encountered barriers for implementation in the observed countries were associated with a **lack of dedicated funding** respectively a **lack of assigned responsibilities among involved stakeholders** (ministries, agencies, others) for financing and implementing the foreseen actions. As already Steurer (2007) has highlighted, one main reason preventing the implementation of a strategy can be a lack of budgetary resources foreseen for particular actions, in particular in case the respective strategies have been drafted or coordinated by relatively “weak” ministries with comparatively limited financial resources (e.g. Ministries of Education). For example, in Austria’s LLL:2020 strategy, various questions regarding the financing mix for the planned measures were inadequately clarified, impeding implementation. No earmarked (additional) budgets were foreseen for the implementation of the strategic goals, but actions should be funded from the (pre-existing) overall budgets of each ministry or financing body like the PES or Länder. However, at the same time, responsibilities for the specific actions were not clearly assigned to respective stakeholders. This resulted in only marginal progress in some fields.

In this chapter, we illustrated the main barriers for success of skills strategies at the hand of cases where these barriers showed large disruptive potential. It would certainly be wrong to consider all of the strategies mentioned above as unsuccessful. However, many of the challenges met by above strategies have been more successfully mitigated by policy-makers in other observed cases. In the next section, we focus on cases that encountered such barriers, but could – at least partly - mitigate them, therefore illustrating central success conditions for strategic policy documents.

## 6 Navigating conditions for success

The previous section has shown that there are multiple external as well as internal barriers that can impede the implementation of a given skills strategy. In the following, we focus on those cases that encountered such problems, but could successfully mitigate them, therefore illustrating central success conditions for strategic policy documents: encompassingness, adaptability and consistency.

### 6.1 Encompassingness

Many external barriers to the implementation of skills strategies can be avoided/overcome by designing a particularly encompassing strategic policy document. More specifically, the goals and actions of the respective strategy should – as far as possible – be formulated in ways that encompass the

priorities of broader groups of stakeholders (cf. Olson, 1982), beyond the positions of government parties alone, so that even after major government changes, the newly elected and potentially changed government still has incentives to follow-up on the respective document.

One option is to build the respective strategy process on a broad coalition of non-governmental stakeholders, which in turn might be more likely to hold also subsequent governments accountable to the goals of the strategic document. In particular, skills strategies can be built upon the agreement of social partners (employer associations and labour unions), which in many skill formation systems take over substantial semi-public functions in the governance of skills systems (e.g. training administration, standardization, reform, provision) (Busemeyer & Trampusch, 2012b; Emmenegger et al., 2019; Streeck & Schmitter, 1985). Due to their proven expert knowledge, social partners are often seen as the most appropriate actors informing reforms in this policy area (Culpepper, 2011), consequently future governments might be more likely to refrain from jeopardizing a given skills strategy if it is built upon broad agreement by social partners. As social partners usually decide on “compromise positions that can achieve broad political support”, this reduces “the risks of blockage in the parliamentary debate” (Bonoli & Gonon, 2023). The position of social partners should ideally be anchored both in the formulation phase as well as during implementation, for example via social partner councils overseeing implementation (Nordbeck & Steurer, 2015). This approach of making the strategy more encompassing can be expected to work best in countries with well-developed institutions of social partnership<sup>5</sup>, more “pluralist” forms of ad-hoc involvement of stakeholders – as in liberal and transitional skill formation systems - have proved to be less beneficial for strategy design and implementation (Rayner & Howlett, 2009a).

Interconnectedly, skills strategies can be designed so that they emphasise goals and policy measures that are accepted across the political landscape. For example, a given strategy might focus on goals and actions that do not only have primarily economic aims – i.e. matching skills provided to the demands of firms - but simultaneously also try to create positive effects for social

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<sup>5</sup> In neo-corporatist economies, social partnership is supported by high membership densities in a “limited number” of “noncompetitive, hierarchically ordered” associations with representational monopoly, which make employer interest organisations respectively labour unions the legitimate voice of their respective interest group Brandl, B., & Lehr, A. (2019). The Strange Non-Death of Employer and Business Associations: An Analysis of their Representativeness and Activities in Western European Countries. *Economic and Industrial Democracy*, 40(4), 932-953. , Schmitter, P. C. (1979). Still the Century of Corporatism? In P. C. Schmitter & G. Lembruch (Eds.), *Trends Toward Corporatist Intermediation*. Sage %! Still the Century of Corporatism?

inclusiveness, democratic participation, or individuals' overall well-being. Such a more balanced strategy might resonate with decision-makers also after changes in government. Future governments might to a certain extent “cherry-pick those aspects that served their interests best” (Nordbeck & Steurer, 2015), but the strategic policy document - and many of their overarching long-term, strategic goals - can remain relevant across government changes in particular if social partners or other non-governmental stakeholders can act as a counterbalance vis-à-vis government in the implementation processes.

A focus on encompassing compromise positions limits the extent to which disruptive, transformative changes are possible within the lifecycle of one strategy alone. Rather, strategic policy documents should be seen as a tool to initiate a series of smaller-scale changes that can ultimately accumulate up to large-scale, transformative changes via a process of incremental, gradual institutional change (Mahoney & Thelen, 2010; Streeck & Thelen, 2005). While disruptive changes might certainly be desirable in some political-economic contexts (as is reflected in the cases of England and Bulgaria), strategic policy documents appear as the wrong tool to bring about such abrupt, transformative change. Strategic policy documents formulate long-term (i.e. *strategic*) plans for the further development of skill formation systems that stretch across electoral cycles, and encompassing strategies appear better suited to withstand governmental changes.

For example, in Germany, the National Skills Strategy was launched in 2019 under a grand coalition led by Christian Democrats (CDU) together with social democrats (SPD), but has been renewed in 2022 by the a new social-liberal government led by social democrats (SPD), together with the market-liberals (FPD) and the left-wing Green Party. From the beginning, the National Skills Strategy had been created under the lead of the relevant federal ministries together with “strategy partners”: the public employment service, representatives of the federated states as well as the social partners and key experts. These have in turn been involved in the strategy design and implementation process through regular binding exchange meetings (working groups and ‘thematic laboratories’), institutionalizing communication and cooperation. Strategy content was consequently less a reflection of direct government intervention. Rather, it reflects a compromise between all involved stakeholders, in particular the social partners, the latter of which are seen as the main stakeholders of the German skill formation system.

The Norwegian Strategy for Skills Policy (2017-2021) can be considered as a particularly encompassing strategy. Even though the conservative party continued leading the government after the 2017 election, the government’s



junior partners for the new legislative period changed, and so did lead-positions in the involved ministries (Ministry of Economy, Ministry of Education, Ministry of Labour and Social Affairs). Despite these fluctuations, the strategy remained highly relevant across its whole foreseen lifecycle, with a key facilitator for the successful implementation of the strategy being involvement of the social partners (and other stakeholders) in the strategy process which gave a common understanding and committed both government, regional government and the social partners to its implementation. For example, social partners were involved as key stakeholders in the central governance councils overseeing strategy implementation (Skills Policy Council, see further below). Furthermore, despite being introduced under a conservative government, it struck a broad balance between economic, market-orientated goals and social (inclusiveness) goals of skills policies.

Involvement of broader stakeholder groups as social partners in encompassing skills strategies can also facilitate a fit between a strategies' goals and actions, and the specific country context. Given their respective expert knowledge in the field of skills policies in many countries, social partners can be essential to “translate” broader international policy priorities or best practice examples that often inform design processes of strategic policy documents into the local context. For example, while the German National Skills Strategy (2017) was certainly influenced by EU policy initiatives like the European Pillar of Social Rights or Europe's Digital Decade, the respectively proposed actions to follow up on broader goals refer closely to the national context and therefore pre-existing policy instruments upon which the strategy can be built in its implementation.

## 6.2 Adaptability

The importance and long-term relevance of strategic policy documents can further be improved if the governance structures of the strategy process ensure a certain degree of adaptability. Such adaptability can be achieved for example by foreseeing explicit ‘update points’ at which strategy implementation is assessed and foreseen future actions can be amended in order to match new priorities. Alternatively, or in addition, implementation of the strategy may be coordinated by particular working groups that are obliged to meet on a regular basis and that can take ad-hoc measures to align the strategy with changing external or internal circumstances. Adaptable skills strategies can more easily endure not only government changes, as strategies can be more easily modified to reflect changing policy positions, but also external socio-economic shocks, both of which might easily derail very rigid governance frameworks of strategic policy documents.

For example, in the case of the German National Skills Strategy, the original strategic policy document introduced in 2019 under a conservative-led government already scheduled a designated update for the year 2020 – in parallel to the foreseen federal elections. The update included an assessment of achieved progress and the subsequent adaption of overarching goals and subsequent policy actions. This in-built opportunity, namely to use preexisting coordination channels between the different stakeholders already fostered in the strategies' first phase while being able to refine further implementation according to new preferences, was seized by the newly elected social-democratic-green-liberal government. It proceeded with the “continuation and further development” of the National Skills Strategy in 2022, for example by strengthening the role of general adult learning alongside job-related training. Furthermore, the implementation process of the strategy was envisioned as an organically growing process where foreseen goals get more precise and refined through the continuous and deeper cooperation of the involved stakeholders in regular binding exchange meetings, during which changing circumstances could be discussed (e.g. the Covid-19 pandemic) to inform continuous refinement and adaption.

Similarly, the Norwegian Strategy for Skills Policy (2017-2021) set up a joint committee responsible to “follow-up” on the implementation of the strategy, the “Skills Policy Council”. This body was designed as the driver for the implementation of the strategy, with each strategy partner having to report to the council their respective policy actions implemented to follow up on the goals of the strategy. In this process, the strategy partners themselves had substantial leeway in the design and implementation of the respective policy measures, even though the main overarching strategic policy document officially remained unchanged. Plans could be adapted, for example in the face of the Covid-19 pandemic, with eight additional tripartite programmes for skills development launching in 2020 and 2021, to deal with the growing number of laid-off workers and workers who had lost their jobs. Also in the case of the Qualification Plan Vienna (2013 – 2020) (Austria), periodic meetings of a steering committee served as a platform for discussing the ongoing implementation progress, addressing emerging challenges (distortions in the aftermath of the pandemic, an increase of incoming refugees), and collaborating on further enhancements of the strategy.

### **6.3 Consistency & feedback loops**

Finally, consistency can be considered as a central success factor for skills strategies (Aubrechtová et al., 2020), which describes how well “policy goals and means are (or are not) linked” (Rayner & Howlett, 2009b). Aligning with Hall (1993), we emphasise consistency among and between “the overarching

goals that guide policy in a particular field” (e.g. adapting the labour force to technological change), “the specific techniques or policy instruments used to attain those goals” (e.g. publicly provided and funded up- and reskilling courses for employees), and finally the “precise settings of these instruments” (in particular the budget available for a specific policy measure). In our understanding, a strategy is consistent if it is ensured that

- individual goals (and if specified, instruments) do not contradict each other
- responsibilities for following-up on the respective goals are clarified, including funding responsibilities
- policy instruments designed to follow up on the overarching goals are suitable to do so

Involved strategy partners can consider these aspects of consistency already in the design phase of the respective strategy. However, ensuring consistency of a strategy should rather be understood as a continuous process. Foreseen actions and interconnected responsibilities do not necessarily need to be specified already in the initial strategic policy document, if further specification of these details in the implementation phase can be ensured. Also certain inconsistencies in the respective strategy can be resolved. This can for example be achieved if governance bodies are steered by high-level political representatives with decision-making power (Lassnigg, 2020). Such political-level meetings ideally complement technical-level meetings involving low- to mid-level civil servants, which depend on binding political-level decisions to resolve inconsistencies in the strategy process (e.g. a lack of assigned responsibilities for a certain policy measures) in order to follow up on strategy implementation (OECD, 2020). In any case, commitment of high-level political representatives to the respective strategy process substantially can substantially facilitate the implementation process.

For example, in Norway, the strategy document itself did not sketch out concrete plans of action on the different measures, timelines or clear responsibilities. However, the partners were nevertheless aware of their own responsibility regarding the different actions, with every partner needing to report their actions to the Skills Policy Council. This Council was led by political-level representatives, being chaired by the (Deputy) Minister of Education, and therefore acting as a direct channel to influence political-level decisions. Additional working groups and administrative meetings were held as a follow-up to these high-level meetings. Furthermore, the prime minister himself was personally engaged in the strategy and the principle signatory of the strategy, showing buy-in at high political level, keeping the momentum of

the strategy process and ultimately leading to a series of policy measures which the social partners would generally support.

Also in the case of the Qualification Plan Vienna 2020, impulses from the city council, explicitly the councillor for Economy and Labour Market at the time, supported the launch of the joint strategic document involving the essential stakeholders and the continuation of the related implementation processes. But already in the initial strategic policy document, goals were clearly formulated and explicitly linked to specific measures including ongoing programmes, projects and initiatives as well as new measures to be set up. This clear linkage between set goals and explicit measures can be considered one of the main strengths of the strategy's setup. Furthermore, responsibilities for implementing and ultimately also financing the foreseen actions were clearly assigned to the involved stakeholders.

Additionally, a well-designed monitoring process can help to ensure consistency over time by establishing concrete feedback loops. These feedback loops can be established for process monitoring, outcome monitoring, and trend monitoring (Nordbeck & Steurer, 2015; Volkery et al., 2006). *Process monitoring* should be designed to capture progress in implementing actions that follow-up on the goals of the strategy (e.g. actions completed/in progress/delayed) and can be of qualitative or quantitative nature. If linked to the implementation process, process monitoring can be key in holding strategy partners' accountable to follow up on the strategies' goals via implementing concrete policy measures. *Outcome monitoring* should capture the direct outcomes related to the strategies' actions, often relying on data from lower-level monitoring arrangements or evaluations specific to the implemented policy measures. Outcome monitoring can facilitate amendments of the strategy in case the chosen policy instruments are not suited to follow-up on a particularly defined higher-level goal. Finally, *trend monitoring* captures socio-economic trends relevant to the strategy, but which cannot be shaped by the respective strategy and are therefore without its direct reach. Often, population-level indicators are used, for example tracking overall participation in adult learning or the share of individuals in VET versus general education. These can hardly be influenced by the (sets of) policy measures included in skills strategies alone, in particular within the limited lifecycle of skills strategies<sup>6</sup>. However, if linked with strategy

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<sup>6</sup> Effects of the strategies' (sets of) policy measures on population level indicators would often be indiscernible from effects of other elements of the overall skill formation system and broader socio-economic changes. Trend monitoring is therefore not suited to act as the sole monitoring mechanism of a skills strategy, as it does not give any indication about if the respective actions are implemented and work as intended towards the overarching goals.

implementation, trend monitoring can help strategy partners to identify current strengths and weaknesses of the overall skill formation system, thereby highlighting priorities for action and helping to amend a particular strategy to tackle changing circumstances. Furthermore, trend monitoring acts as a motivational tool, giving strategy partners a common vision to jointly strive towards.

Elaborate monitoring arrangements on process, outcome *and* trend level should not be seen as a necessary condition for the success of a strategic policy document. In case such monitoring arrangements are implemented, however, successful skills strategies feed the results of the monitoring process back to regular, binding meetings of governance bodies responsible for the implementation of the respective strategy and stakeholders with decision-making power, and not only to a smaller circle of experts and lower-level public administrators (Gjoksi et al., 2010; Wachter, 2010).

For example, in the case of Norway, the Ministry of Education, quantitative outcome indicators and trend indicators were not defined, as none of the strategy partners felt that this would give any added value. However, process monitoring had been applied directly by the Skills Policy Council under the lead of the (Deputy) Minister of Education, to which each strategy partner had to report planned actions and progress on implementing them. In the case of the Qualification Plan Vienna (2013 – 2020), the strategies' central steering committee met regularly, overseeing developments within the set process, outcome and trend indicators. As this steering committee was composed of representatives of strategy partners with real decision-making power, they could act upon the results provided by the monitoring process and therefore, ensuring consistency of overall goals with the foreseen policy measures by amending the original strategy as deemed necessary.

## 7 Conclusion

The rise of strategic policy making in the area of skills policy and the emphasis organisations as the OECD and the EU place on strategic policy documents is hardly surprising. Despite the fact that “little is known about the effectiveness, results and impact of developing such strategies” (Working Group on Adult Learning, 2022), strategic policy documents can easily appear as a panacea to achieve progress in a policy field shaped by complex governance structures, with a multiplicity of different actors at multiple government levels involved in provision, financing, reform and day-to-day administration. This report demonstrated how far strategic policy documents can indeed follow up on these expectations that were placed upon them. The cross-country comparative analysis of strategic policy documents and their implementation

goes beyond conventional wisdom on the benefits of skills strategies, and empirically illustrates what can realistically be achieved via strategic policy documents.

Cross-country comparative analysis suggests that during their foreseen lifecycle, skills strategies can encounter a wide range of different barriers for implementation. Barriers external to the strategy process like government changes, socio-economic shocks, and complexities arising from multi-level systems of government have shown great disruptive potential for the implementation of strategic policy documents. Also barriers internal to the strategic process, like misalignments between strategies' goals, indicators and actions and misalignments of strategy goals with a specific country context can disrupt implementation. However, the report has shown that – to a certain extent - these barriers can also be successfully mitigated.

First of all, in particular strategies that encompass broader groups of stakeholders and their priorities and include them in governance arrangements are better suited to withstand external disruptions. Building the respective strategy process on a broad coalition of non-governmental stakeholders, in particular social partners, can help to hold governments accountable to the agreed upon goals of the strategic document. Second, if the governance structures of the skills strategy ensure a certain degree of adaptability (e.g. via foreseen update points), skills strategies can be more easily be adapted to reflect changing external circumstances without derailing the whole strategy process and many of its overarching long-term, strategic goals. Third and finally, skills strategies that ensure consistency in the face of external and internal pressures - that is complementarity between their overall goals, suitability of policy instruments designed to achieve these goals, and clearly assigned (funding) responsibilities for implementation - appear as particularly resilient. Such consistency might be achieved in the strategies' design phase, but realistically needs to be ensured also via dedicated governance arrangements after a strategies' launch (a well-designed monitoring process with concrete feedback loops).

However, skills strategies can hardly act as a golden bullet. None of the observed skills strategies were fully implemented, and many skills strategies remained rather limited in the extent to which they aimed for far-reaching, large-scale reforms of the overall skill formation system. In particular in political-economic contexts where abrupt, disruptive reforms are striven for by decision-makers (as is often the case in liberal or transitional skill formation systems that are deemed to be “underperforming” ), strategic policy documents might be the wrong tool to bring about such change. After all, strategic policy documents formulate long-term (i.e. *strategic*) plans for the

further development of skill formation systems that stretch across electoral cycles, and encompassing strategies resting on compromise positions appear better suited to withstand governmental changes.

However, despite the often limited extent to which they could be implemented, it would be unwarranted to call for an overall abandonment of strategic policy documents as an overall approach to policy-making. Many of the observed skills strategies have contributed to the success of at least some policy instruments in the area of skills policies, or have newly established channels of coordination that build the foundation for later reforms. As shown in historical institutionalist literature, also initial smaller-scale changes have the potential to ultimately accumulate up to large-scale changes via a process of incremental, gradual institutional change (Mahoney & Thelen, 2010; Streeck & Thelen, 2005).

Furthermore, even though “comprehensive policy integration cannot be achieved through a single multi-sectoral strategy” (Nordbeck and Steurer 2014), the respective strategy processes were nonetheless often able to mitigate reform deadlocks related to the introduction of new policies, and/or improve the interplay between smaller sets of relevant policy measures in the field of skills policies by making them mutually reinforcing and/or avoiding duplications of efforts. Finally, skills strategies served as reference points that can help involved stakeholders to push forward reforms of the skill formation system, enabling them to justify the introduction and/or funding of specific policy instruments. In sum, while it may be true that strategic policy documents sometimes follow a “political logic that coopts policies that would have been formulated anyway” (Nordbeck & Steurer, 2015), skills strategies can certainly *improve* skills policy-making by creating foundations for policy coordination and facilitating change, increasing complementarity between policy measures and reinforcing policy priorities among decision-makers.

The barriers for the implementation of skill strategies and means to mitigate them identified in this report can in turn help policy-makers “make strategies more strategic by explicitly dealing with the context of limiting polity structures, actors constellations and the ways public administrations work” (Steurer, 2007). Providing lessons learned that go beyond the observed country case studies, these insights can support the development of the next generation of skills strategies across the EU, and feed back into the broader literature on strategic public management and other policy domains where strategic policy documents are applied, including sustainable development, environmental planning, social policy and healthcare reform (Rayner & Howlett, 2009b).

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