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TORINO PROCESS 2012
WESTERN BALKANS AND TURKEY

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PREFACE

The Torino Process is a participatory process leading to an evidence-based analysis of vocational education and training (VET) policies in a given country. It is carried out in order to build consensus on the possible ways forward for VET policy and system development, considering the contributions of VET to enhanced competitiveness, and sustainable and inclusive growth. This includes determining the state of the art and vision for VET in each country and an assessment of the progress that countries are making to achieve the desired results. More specifically, the Torino Process is a vehicle for:

- developing a common understanding of a medium/long-term vision, priorities and strategy for VET development, exploring possible options for implementing this vision and/or making further progress;
- designing and evaluating home-grown and affordable VET policies, based on evidence or knowledge and collaboration;
- updating the analyses and achievements at regular intervals;
- providing opportunities for capacity development and policy learning within and among partner countries and with the European Union (EU);
- empowering countries to better coordinate the contributions of donors to achieving agreed national priorities.

The European Training Foundation (ETF) launched the Torino Process in 2010 and the first round was concluded in May 2011 at an international conference entitled 'The Torino Process – Learning from Evidence'. Among the outcomes of the conference was the establishment of the Torino Process as a biennial policy learning exercise founded on country ownership, participation, and a holistic, evidence-based policy analysis. The second round was launched in 2012.

The Torino Process overall is open to all ETF partner countries. This report draws on the lessons learned by the ETF. Its overall objective is to present the progress that has been made in VET policy and system development, and identify constraints and future priorities for the further modernisation of VET policies and systems in the region. It is addressed to policy makers and practitioners in the partner countries, but also to officials, researchers, experts and the donor community who are interested in learning more about the partner countries in the field of VET or related policy fields.

This report was prepared by Evelyn Viertel, ETF expert, who analysed the information in the national reports for the preparation of this document. Valuable support was provided by Doriana Monteleone, ETF statistical officer. This report and the Torino Process are the result of a team effort. The ETF would like to take this opportunity to thank all the counterparts from the partner countries who contributed to the national reporting process in 2012, as well as the ETF country teams which facilitated the process in the countries. The ETF is also grateful to the statistical team, the internal peer reviewers and the ETF editorial board members who provided valuable input, comments and suggestions on the final draft of the document.

CONTENTS

EXECUTIVE SUMMARY

This regional report covers the Western Balkans and Turkey. It has been developed from an analysis of the national 2012 Torino Process reports for Albania, Bosnia and Herzegovina, Kosovo[1], the former Yugoslav Republic of Macedonia, Montenegro and Serbia. It also takes into account evidence of policy progress made available through the participation of Croatia, the former Yugoslav Republic of Macedonia, Montenegro, Serbia and Turkey in the 2012 Bruges Interim Reporting exercise.

The report provides an overview of the region based on the national reports, including a review of trends since the initial 2010 Torino Process regional report. The regional report follows the analytical framework of the national reports and in doing so is organised in line with the following building blocks: vision and state of the art in VET; external efficiency in terms of addressing demographic, economic and labour market needs; external efficiency in terms of addressing social demands for VET and promoting social inclusion; internal quality and efficiency of initial and continuing VET delivery; and governance and financing of the initial and continuing VET system and institutional capacities for change.

The analysis finds that there is on-going progress in the region towards improved VET systems in policy formulation and implementation. It also finds that this policy progress is being made in a challenging context due to structural adjustments in national labour markets, either because of the transition to more market-oriented economies or as a result of recovery from the global financial crisis. In all countries, VET has grown in importance as a policy area. However, there is still a gap between policy progress and implementation.

The economic transition in Western Balkan countries over the last decade has brought about major changes in demand for skills. VET is perceived as an important policy priority throughout the region, particularly with respect to young people, who are among those most affected by unemployment or informal employment. Youth unemployment levels are high in all countries: Kosovo (73% in 2009), Bosnia and Herzegovina (57.9% in 2011 – up 10.4% on 2008 figures), the former Yugoslav Republic of Macedonia (55.3%), Serbia (50.9% – up 15.7% since 2008) and Albania (30.5% in 2010).

The situation is compounded by widespread informality throughout the economy and the job market – a study by Schneider (2012) states that the 'shadow economy' represented 31.3% of 'official' GDP in Turkey. Levels reached 32.1% in Croatia, 33.6% in Bosnia and Herzegovina, 34.3% in Albania and 37.6% in the former Yugoslav Republic of Macedonia. In Serbia, results from the Labour Force Survey (LFS) of 2011 stated that 18.8% of all employed people were in informal work.

Employers typically require people with better occupation-related, practical skills, key competences such as computer and foreign language skills, and a good working attitude. However, VET systems are not necessarily geared to the preparation of immediately employable graduates – and there is a strong trend for graduates from technical and vocational education to progress on to higher education. Nevertheless, graduates with vocational or higher education degrees have better employment prospects and are less vulnerable to unemployment. The groups of the population most disadvantaged on the labour market are: labour market entrants with insufficient practical skills, women, low-skilled individuals, people living in rural or isolated areas or on the outskirts of big cities where adequate infrastructure is lacking, and members from certain ethnic groups including the Roma, Ashkali and Egyptians.

There are two strong fields of influence on skills policy development in the region: firstly, policy development in each country is shaped according to the degree of unemployment, the type of skills demanded in the labour market and the specific economic, social and institutional context; and secondly, the policy influence deriving from regional proximity to developments in education and training in the European Union (EU), and in particular Enhanced EU Cooperation in VET.

1 This designation is without prejudice to positions on status and is in line with UNSCR 1244 and the International Court of Justice's Opinion on Kosovo's declaration of independence – hereinafter 'Kosovo'.

Many of the education and training priorities of the EU are to some extent paralleled in the region, due mainly to the shared perspective of the valuable potential contribution of VET to economic growth and social development, but also to the medium- to long-term goal of accession to the EU as a Member State. This outlook suggests that countries will increasingly embrace EU objectives and targets over the coming years and that EU cooperative approaches to education and training will be increasingly used as benchmark criteria for national policies and strategies in vocational education.

The report finds both soft and strong influences arising from the interplay of the Bruges-Copenhagen Process with policy initiatives for VET in the region. The softer influences arise mainly from knowledge and information from the EU spilling over into national policy discussions due to its close relationship to the EU, while the stronger influences grow from what appears to be a direct relationship between EU cooperative initiatives and patterns of reform. From the Torino Process and Bruges Reports, the following issues emerged as the key areas of policy influence:

- implementation of reforms in quality assurance, teacher training and key competences as initiatives to enhance the internal efficiency of VET systems;
- production of a national qualifications framework (NQF) for each country and indicative referencing against the European Qualifications Framework as an instrument for improved transparency and governance for vocational education;
- development of entrepreneurship learning as a contributor to external efficiency of vocational education in meeting labour market demands;
- use of vocational education as a means of assisting vulnerable groups as a measure of supporting external efficiency of vocational education through improved social inclusion.

In relation to the overall evolution of the VET system, the Torino Process identified the following key messages for future development of VET policies and systems in the Western Balkans and Turkey.

- **Vision and state of the art in vocational education and training** – A comprehensive approach to education system development that overcomes divisions of responsibilities and enables different ministry and agency actors to work together and define a shared vision for competence development at national and sub-national level, facilitating the integration of economic, employment, regional and social policies.
- **External efficiency: addressing demographic, economic and labour market needs** – A renewed focus on the short and long-term employability of young people and adults, whereby VET training in particular could play an enhancing role alongside macro-economic policies, job-creation measures and continuous efforts to fight informal employment.
- **External efficiency: addressing social demands for vocational education and training and promoting social inclusion** – Broader and better-targeted measures for vulnerable groups, inactive and long-term unemployed people, including up-skilling initiatives for low-qualified workers.
- **Internal quality and efficiency of initial and continuing vocational education and training delivery** – Embedding key competences in the VET curriculum and improving teacher and trainer capacity while focusing on the development of work-based learning and expanding VET at post-secondary level.
- **Governance and financing of the initial and continuing vocational education and training system and institutional capacities for change** – Further capacity building and improved resources are needed to promote social partner involvement in VET with an emphasis on sector councils, NQFs and regional structures as part of efforts towards anticipatory multilevel governance approaches, and the development of multifunctional bodies and centres of excellence.

These messages are interconnected and require integrated policy approaches such as in the case of the relationship between policy vision and governance; for while all of the countries could provide visions and related strategies for further improvements in vocational education, the actual level of achievement made toward these improvements suggests a need for closer coordination in policy development between the various education and training sectors in order to ensure that efficiencies are obtained and that the existing capacities of the countries are maximised.

1. POLICY VISION IN VOCATIONAL EDUCATION AND TRAINING

Throughout the region, vocational education is perceived as an important policy priority able to contribute to economic growth and social development, and each country has established policies and strategies to target the development of the VET sector. Most of these are focussed on key areas such as: qualifications frameworks providing clear pathways through education systems; adult learning to assist with requalification and skills upgrading; and initial vocational education within the context of secondary education. Despite the large variations in scale of the country systems, there is a common trend in vision in the region, particularly in terms of VET in a lifelong learning context, and all individual countries are adopting measures that favour stronger links between education and work.

Each of the countries in the Western Balkans and Turkey face specific challenges arising from the current economic context, many of which relate to structural adjustment in the transition to market economies and recovery, or opportunities, from the global financial crisis.

Pre-crisis labour market participation and employment rates were already low compared to the EU, especially for women. Levels of precarious employment such as non-standard employment, mini-jobs, temporary or seasonal work are generally higher in the region than in EU countries. Structural skill mismatches and pronounced labour market segmentation are present, average unemployment is of long duration and there is a low probability of people leaving the jobless register to enter or re-enter the labour force. On a more positive note, Kosovo, the former Yugoslav Republic of Macedonia and Turkey have managed to reverse the trend of rising unemployment rates since 2008, but unemployment rates in Serbia have jumped to unprecedented levels. Young people are heavily affected by unemployment or informal employment across the region (see Tables 8 and 9 in annex).

The 2012 Torino Process in the WBT captured numerous strategies to improve the articulation of VET and the socio-economic context of each country, and VET is now considered to have a key role as a stepping stone in lifelong learning. The countries are aware of the urgent importance of employability for future graduates and of the pivotal role of VET in social inclusion. As a result, different strategies and policies have been drawn up to meet specific needs in each state.

However, a broader strategic coordination across the entire field of human capital development is lacking. Furthermore, it can be argued the lack of overall strategic coordination is influenced by the absence of a clear and explicitly expressed long-term national vision for the future development of VET which defines and anticipates its overall contribution to social and economic development as well as the contribution of the VET subsector to the lifelong learning continuum.

The lack of long-term vision in the countries is partly attributable to limited development of representative multilevel governance structures in the region which can be a forum for the participatory formulation of shared and sustainable long-term vision. In turn, the weaknesses in the governance structures also constrain the capacity of the countries to implement appropriate strategies and formulate effective policies. Increasing the representative nature and effectiveness of governance structures would therefore have a potential impact in terms of vision building, overall strategy and policy coherence and a more efficient link between policy formulation and implementation.

The Torino Process highlighted three specific challenges that must be overcome in order to improve the relationship between vision, governance and policy implementation:

- fragmentation – improving participatory approaches and building trust across government and stakeholders towards a shared vision for lifelong learning;
- implementation – visions and strategies should be home-grown, feasible, have clear indicators of achievement and a sound capacity and financial basis;

- evidence – enhancing the availability of information on economic and social development goals and skills needs to inform visions and strategies.

Addressing fragmentation is a key starting point. In the Western Balkan countries and Turkey, where public bodies traditionally lead the strategic planning and management of education and training, often with decision-making concentrated in central government with limited devolution of tasks or resources to regional or local authorities. In addition, responsibilities for different aspects of education and training are split between various ministries, departments and agencies depending on the country. Coordination between government institutions with responsibilities for education and those with responsibility for employment, social and economic development and financing remains constrained by decision-making processes that are hierarchical and generally centralised. Schools are often owned, managed and run by central authorities but the multilevel governance approaches are desirable if VET provision is to meet the specific needs of local communities and labour markets.

Although national governments recognise that various stakeholders should participate in the VET policy cycle, they generally lack a clear shared vision of any form of multilevel governance capable of reshaping the role of the state from controller to facilitator on the basis of trust in public management. The current shortcomings are not due exclusively to limitations in national government policy and capacity as territorial authorities and social partners also frequently have limited role or involvement in VET policy. In many cases, the powers of regional and local entities are not well defined, and they are short on capacity and resourcing. An explicit policy for the active involvement of regional and local authorities, social partners and non-governmental bodies in VET policy could strengthen the cycle of reform formulation, implementation and adaptation.

There is also an institutional or capacity deficit in terms of professionalised (consultative or implementing) bodies, such as social partners and civil society organisations willing to work with the government in defining and implementing VET policy at various levels. In the vocational schools themselves, school managers and boards should be empowered to enhance local partnerships. Economic sectors should strive to establish sector councils like those of Croatia and Turkey that involve representatives of government and social partners in a way that enhances policy coordination.

The countries suffer from a deficit of information on short- and longer-term skills needs and shortages within the economy, and while each individual state has developed a VET strategy, they are generally still weak in formulating SMART[2] objectives, monitoring and learning from results in the medium to long term.

The countries covered by this regional report are preparing for accession to the EU and they are therefore influenced by medium- to long-term EU policy objectives and targets to improve the performance, quality and attractiveness of VET expressed in the Copenhagen Process. These goals are approached through an inclusive cooperation process involving Member States, the European Commission, candidate countries, the European Free Trade Association-European Economic Area (EFTA-EEA) countries, and social partners. Hence, EU cooperative developments on vocational education have an influence on perspectives for the long-term evolution of education and training in the five candidate countries, including the development of strategies, concrete initiatives and actions. The survey on the status of the 22 short-term deliverables of the Bruges Communiqué in the candidate countries shows the EU benchmarks are widely seen as strategic objectives and a source of inspiration for reform (even where these standards are still under construction). The adoption of EU benchmarks by the candidate countries helps them to refer their VET systems to EU strategic objectives. For potential candidate countries, in comparison, this process is frequently perceived as a model of good practice rather than a road map for implementation.

The influence of the Copenhagen process can be conditioned by local priorities that make a critical contribution to policies in the region. For example: regulations on credit transfer systems for VET are in place in Croatia, Montenegro and Turkey, taking the European Credit System for Vocational Education and Training (ECVET) as a guiding principle and operating in close association with the NQFs, while the former Yugoslav Republic of Macedonia and Serbia have no intention of developing a credit system, even though the European Credit Transfer and Accumulation System (ECTS) has been adopted for higher education. In most

2 SMART – strategic, measurable, achievable, result and time-based.

countries, the development of a credit system or of unit-based qualification standards shows clear articulation of the goal to create flexible learning systems and, in certain cases, new qualifications are developed on the basis of 'units of learning outcomes'. The EU recommendation on ECVET has been adopted as the guiding principle for policy making across the region.

A further consideration on the level of influence of the EU Enhanced Cooperation in VET is that awareness of the strategic importance of quality and quality assurance in VET was already widespread before 2010, when a large impetus was received from the policy priorities endorsed by the European Quality Assurance in Vocational Education and Training (EQAVET). The EQAVET Recommendation is considered a cornerstone of improved quality assurance in several countries, and as at least a source of inspiration in others. However, the implementation of quality assurance instruments is still at an early stage of development across the region.

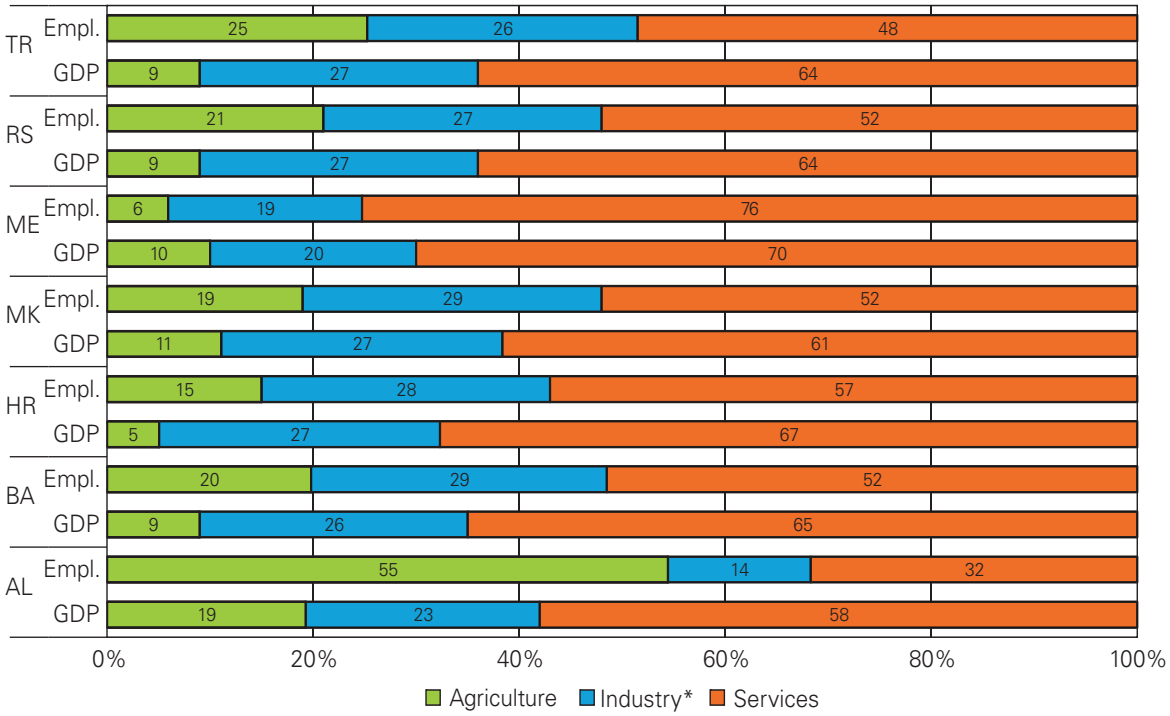
Similarly, most NQF activities in the candidate countries started before 2010 with more significant initiatives taken recently. It is important to stress that the NQFs are at very different stages of development, ranging from conceptual approaches, through preparatory work, to formal adoption, largely dependent on local conditions. NQF levels and areas of focus are also diverse, but the European Qualifications Framework functions as a lever for reform in all of the countries.

In conclusion, evidence from the Bruges and Torino Process confirm the extensive level of the direct and indirect influence of the EU Enhanced Cooperation in VET on the countries in the region.

2. ADDRESSING DEMOGRAPHIC, ECONOMIC AND LABOUR MARKET NEEDS

The labour markets of the region have developed a stronger focus on the service sector during the last 15 years. This sector now contributes more than 50% of both GDP and employment in all countries except Albania and Turkey, where it contributes 32% and 48% of employment respectively. A further key feature of the Western Balkans and Turkey labour market is the continuing role of the agricultural sector as a source of employment, providing more than 20% of jobs in all countries apart from Croatia and Montenegro.

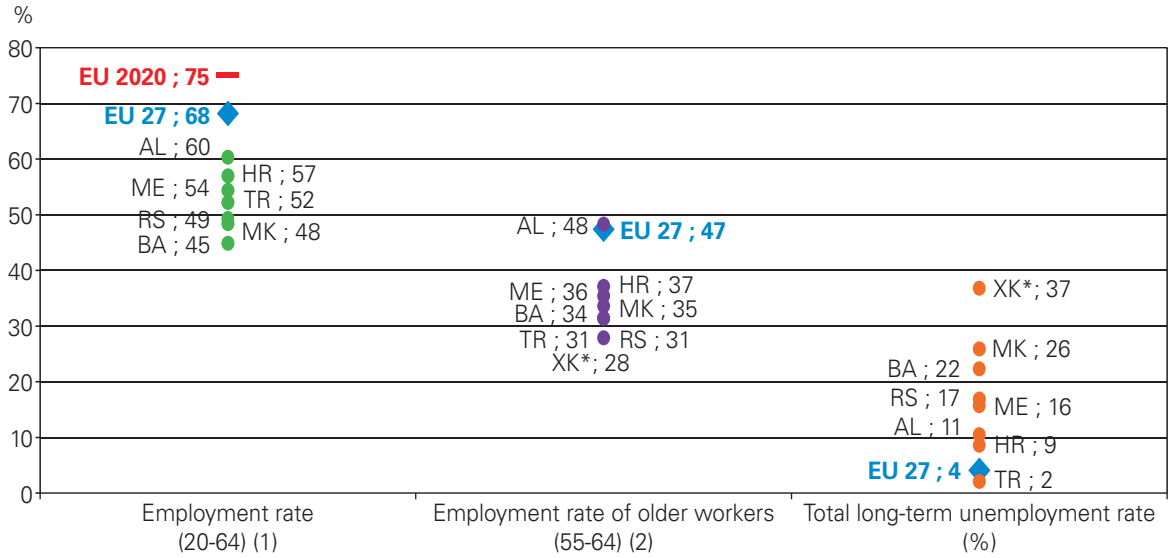
FIGURE 2.1 EMPLOYMENT BY SECTOR VS GDP BY SECTOR, 2011 (%)



Country codes: AL – Albania; BA – Bosnia and Herzegovina; HR – Croatia; MK – former Yugoslav Republic of Macedonia; ME – Montenegro; RS – Serbia; TR – Turkey. (*) Two-letter code yet to be defined. The provisional code MK does not affect the definitive denomination of the country to be attributed after the conclusion of the negotiations currently taking place in the United Nations.*
(*) Industry includes construction. Age ranges: AL and RS – 15-64; MK – 15-79; BA, HR, ME and TR – 15+.
Sources: GDP by sector – World Bank, World Development Indicators database; AL – INSTAT (2011 preliminary data); employment by sector – National statistical offices, LFS publications and online data; AL – INSTAT online administrative data (2010)

The EU provides a general reference point for the labour markets of the region. **Figure 2.2** indicates where the Western Balkans and Turkey stand in relation to employment rates in the EU Member States. This highlights the significant additional challenges facing the countries in preparing for accession in particular regarding employment rates, older workers and long-term unemployment.

FIGURE 2.2 WESTERN BALKAN COUNTRIES AND TURKEY AND EU BENCHMARKS FOR EMPLOYMENT, 2011 (%)



XK – Kosovo. (*) Two-letter code yet to be defined. XK is the provisional code used by Eurostat.*
Notes: (1) BA and ME – 25-64; (2) BA – 50-64; AL – data for 2010; XK – data for 2009.
Sources: EU-27, HR, MK and TR – Eurostat database; AL, BA, ME and RS – LFS publications; XK – ETF inputs to European Commission's progress report 2012 (unpublished)

Labour markets have become segmented with low participation and employment rates

The conversion from state or socially-owned companies to private entities coupled with the related restructuring and downsizing processes has profoundly changed labour market conditions in the Western Balkan countries. Employment practices have tended to move toward greater liberalism, rapid hiring-training-and-firing cycles and reduced job security. Labour markets have become segmented and the level of inequality has increased to the point where countries like Bosnia and Herzegovina have no operational labour market to speak of. Table 6 in annex shows labour market participation rates in greater detail, clearly reflecting the particular shortfall in the generation of sufficient jobs for former state employees in the emerging private sector of the former Yugoslav countries. Jobless growth is chiefly responsible for the high unemployment rates and, to some extent, also the low activity rates.

Administrative employment data from the formal sector shown in Table 7 in annex suggest considerable job losses between 2008 and 2010 in the four countries for which comparable data were available, plus Montenegro (on the basis of 2009 data alone). Albania, Kosovo and Turkey could not be included in this table, as comparable data were not available. The Public Employment Services (PES) in these countries do not register figures for the numbers of people employed; concentrating mainly on the numbers of unemployed people, job vacancies and unemployed individuals mediated into jobs. However, the data collected do not cover all sections of the unemployed or job vacancies. Administrative data for employment also get distorted where there are high levels of informal employment and large agricultural sectors, as is the case in Albania and Turkey.

An illustration of just such a distortion can be seen in Turkey, where the 2008 crisis had a negative impact on formal, private sector employment. In this case, men were more heavily affected by the job losses than women, as it is typically men who have formal, full-time employment in the private sector. Women have a greater tendency to work in the public sector, which was less affected by the crisis, or in agriculture, where the concept of unemployment does not exist. The recovery of employment from 2009 largely occurred through an increase in agricultural employment rather than any growth in the formal private sector, with an increase in less decent and more precarious work.

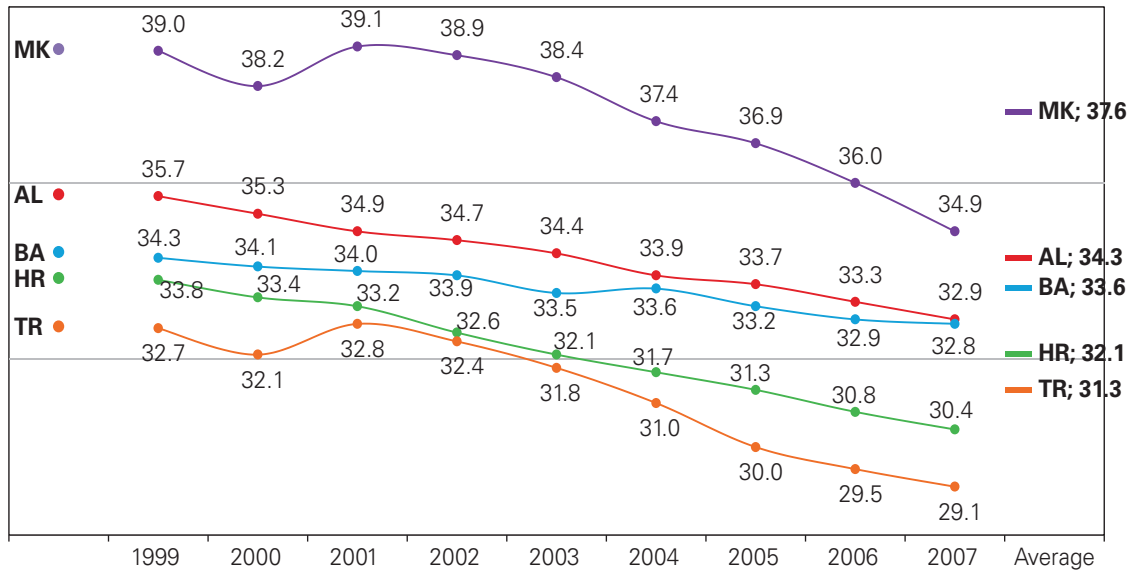
The relatively low pre-crisis employment rates for women declined further in all countries except Kosovo (data for 2009 only) and Turkey (see Table 8 in annex). In Turkey, the number of female workers increased, but mainly in agriculture rather than in formal, decent private or public sector jobs, as described above.

Non-standard types of employment are common and informal employment is widespread

Since the transition began, the Western Balkan countries have registered a large increase in precarious employment, comprising non-standard types of employment, mini-jobs, temporary or seasonal work, and most of the precarious employment occurs in informal employment relationships. Levels are generally higher within the region than in EU countries.

There is a generalised high degree of informality in the economy and the job market. According to data from Schneider (2012) calculating average rates for 1999-2007, the shadow economy represented 31.3% of the official GDP in Turkey, 32.1% in Croatia, 33.6% in Bosnia and Herzegovina, 34.3% in Albania and 37.6% in the former Yugoslav Republic of Macedonia.

FIGURE 2.3 SIZE AND DEVELOPMENT OF THE SHADOW ECONOMY (%)



Source: Schneider, 2012

However, informal employment may be even higher in parts of the region. In Turkey, for example, almost 45% of people in employment are not covered by social security, most commonly due to the form of self-employment used in agriculture and in sectors like construction, tourism and petty trade (Majcher-Teleon and Bardak, 2011). The same study shows informal sector workers to be predominantly low-skilled people with basic or primary education. In Bosnia and Herzegovina informal employment is also widespread among workers with basic or primary education in sectors such as agriculture, construction, the processing industries and services (wholesale and retail) (2012 Torino Process country report). In Albania, the formal sector basically only covers the public administration, banking and insurance sectors (Viertel, 2012). In Serbia, 2011 LFS results show 18.8% of all employed people work informally, accounting for 79% of those with no formal education.

The unemployment pool remains stagnant

There is a widening gap between the skills required for newly created jobs and those offered by workers. This has resulted in less dynamic labour markets, high rates of unemployment and unemployed individuals

left in a stagnating pool. Official data shows only Kosovo, the former Yugoslav Republic of Macedonia and Turkey reversing the trend of rising unemployment rates from 2008, while unemployment rates in Serbia have jumped to an unprecedented 23.6% (see Table 9 in annex).

The initial period of 'transitional unemployment' due to the process of economic change differed from unemployment in advanced economies in several aspects, largely characterised by: structural skills mismatches; pronounced labour market segmentation; long average duration of unemployment; and a low probability of people leaving the jobless register to enter or re-enter the labour force (see Table 10 in annex).

Young people are hard hit by unemployment or informal employment

Structural labour market changes and skill mismatches hit young people particularly hard. Figure 1 in annex shows the youth population as a percentage of the total population in 2005 and 2010, with a projection of continuing high levels of demographic growth for 2015. Birth rates have declined in recent years, but young people still form the largest section of the population in Albania, Kosovo and Turkey, exerting enormous pressure on the education systems and the labour market. In Turkey, for example, 27% of the population are young people aged 15-30 (19.5 million) and a further 26% are in the 0-15 age group, together making up 53% of the population. Some 800,000 young people enter the labour market for the first time every year.

Youth unemployment levels are alarming in all countries, but especially in Kosovo where they reached 73% in 2009 (see Table 11 in annex). This figure must also be viewed against a background of low youth activity (Majcher-Teleon and Bardak, 2011) and high rates of early school leaving of around one third which result in 38% of 15-24 year-olds not in employment, education or training (NEETs) (Martin and Bardak, 2012). Albania had a youth unemployment rate of 30.5% in 2010, however this figure probably suggests that many young people are engaged in the expanded agricultural and informal sectors previously mentioned. While Croatia and Montenegro have rates close to those of the southern EU countries, they also saw considerable increases in the three years from 2008 to 2011. **Figure 2.4** clearly depicts the relationship between youth joblessness and total unemployment.

FIGURE 2.4 UNEMPLOYMENT RATES, 2011 (%)

Note: AL – 2010 data, 15+ instead of 15-64; XK – 2009 data.
Sources: National Statistical Offices, LFS publications; TR – Eurostat, online database (based on LFS)

Young people are also far more likely than other groups to be employed in precarious and insecure jobs, independently of their education and skill levels, and in countries such as Bosnia and Herzegovina, informal employment is estimated to be 30% higher among 15-24 year-olds than among older workers (2012 Torino Process country report). Job satisfaction is declining, especially among young people with higher levels of education.

Employers demand labour with more comprehensive and practical skills

Employers are consulted on the desired profiles and required skills for workers in all of the Western Balkan countries and Turkey and they typically demand: improved practical job-related skills; key competences such as computer literacy and foreign languages; entrepreneurial thinking; and the right attitude to work. Since enterprises in the informal economy are usually not surveyed, their specific skill needs are not taken into consideration. Given the size of the informal economy in the Western Balkans and Turkey, this is a concern that could be addressed by education and training providers through close contacts with local businesses.

Both employers and individuals complain about the lack of practical skills provided by general, vocational or higher education. Arandarenko writes of 'the abundant but impractical knowledge of recent graduates with their lack of skills', due largely to the education system in Serbia nurturing 'knowledge accumulation' over 'problem solving and creativity' in a way that leads to 'the average education level of the population […] lagging behind most Central and Eastern European countries, especially with respect to university graduates' as 'skills (qualification) mismatches are growing' (2011, p. 3). Arandarenko also states that the situation is especially poor in VET where both the curricula and the types of skills provided are wholly inadequate.

The problem is made more complex due to the methodologies followed by the VET system. At present, the subjects to be taught are partly determined by academic, non-business-based experts and the curriculum tends to be overloaded with poor integration between subject theory and occupational practice. The skill levels of vocational teachers also need attention, as most have knowledge only of general subjects or vocational theory, and few have had any exposure to the world outside of education during their professional careers. A more detailed discussion of this point can be found in Section 5.3.

Employers are particularly keen on broader, higher-level professional skills and it is likely that the Western Balkan countries and Turkey will all need similar capacities in the future. Ercan (2011a) depicts a scenario for Turkey where most job opportunities in the near future will materialise in the professional and service occupations, particularly those requiring post-secondary, university or college education or apprenticeship training. This issue will be explored further in Section 5.4.

Most businesses are micro- or small enterprises with low growth potential

The regional economy is dominated by micro and small businesses with around 97-98% of all concerns falling into a category that typically shows low potential for business growth and the creation of decent and skilled jobs.

The Small Business Act policy index for 2012 for the Western Balkans and Turkey examined policy performance among small and medium-sized enterprises (SMEs) and relevant changes from 2009 to 2011 and found that the economies have shown convergence, coming close to EU SME policy practices and standards over the last three years and achieving moderate progress in several areas including the establishment of an institutional framework for entrepreneurial learning.

The assessment concluded that although all economies have made good progress on strategy building for entrepreneurial learning, they must continue to strive for partnership arrangements capable of supporting the systematic development of lifelong learning for entrepreneurship. While entrepreneurship promotion is most advanced in the vocational sector, all of the economies need to reinforce and sustain a policy focus on entrepreneurship as a key competence at all levels of the education system. The higher education community in particular must make greater efforts to extend entrepreneurial learning across all faculties and urgent attention is needed to improve and promote policy support for female entrepreneurship.

The same document stressed that all the Western Balkan and Turkey economies had well-developed training provider networks for management and trade skills with quality assurance mechanisms in place. It did point out, however, that these countries must pay greater attention to the knowledge and skills requirements of sectors trading with the EU in order to prepare for competitive pressure from the EU internal market. The assessment found continued weaknesses in intelligence[3] on enterprise skills across most economies in the Western Balkans and Turkey. However, policy steering for further progress could be provided relatively easily through a policy measure that would promote entrepreneurship learning as a contributor to meeting the demands of the labour market.

VET is not necessarily geared to labour market skills – There is a strong trend of progression to higher education

Studies in all Western Balkan countries and Turkey have traced the paths taken by young people after graduation from school. These studies typically show that a considerable proportion of students from technical education or VET paths do not seeks to enter the labour market immediately after completion, preferring to move on into higher education. VET graduates are aware that low-level VET qualifications will not help them to find jobs – at least not in the more desirable and better-remunerated posts. In Albania, about half of all VET graduates continue their education at public or private universities or colleges, often in fields of study unrelated to their VET specialisation (2012 Torino Process country report). Moreover, young people already in employment claim that the content they learned at school is not necessarily relevant to what they do now. Once they have entered the labour market, many young people find it extremely difficult to transfer to new jobs that better match their skills, as was evidenced in studies for Croatia (Crnkovic-Pozaic, 2009) and Serbia (Huitfeldt et al., 2008).

Tracer studies or studies on the transition from school in the Western Balkan countries and Turkey have been performed on a rather ad hoc basis, often with the help of donors. One exception to the rule is the e-graduate project in Turkey, which requires schools to enter information on the employability status of their graduates in a central system (van Meel and Aribaud, 2012). However, there is little evidence of any data being used systematically in the adjustment of profiles and programmes to develop appropriate skills in any of the countries.

Vocational and higher education generally bring better employment prospects but they have their own problems

Tables 12 and 13 in annex illustrate survey results on employment and unemployment rates by level of education.

In Albania, over 70% of people with either secondary vocational education or higher education are employed, as are 52% with lower secondary and 46% with upper secondary general education, against only 21% of those without education and 34% with at most primary education. Unemployment is highest among those with no formal education certification (26%), followed by those with upper general secondary education (18%), first-stage higher education (ISCED 5) and primary education (ISCED 1) (15–16%). This suggests that both secondary vocational education and higher education provide better employment prospects and slightly better safeguards against unemployment, bearing in mind that for higher education to provide the best benefit, people must complete both first and second cycles.

In Montenegro, 73% of higher education (ISCED 5) graduates, 60% of post-secondary VET (ISCED 4) graduates and 54% of upper secondary VET (ISCED 3) graduates are employed. Employment rates are much lower for people with primary education or less (16%), lower secondary education (17%) and upper secondary general education (33%). Unemployment affects 39% of those with primary education or less, followed by lower secondary (30%), upper secondary general (19%) and upper secondary vocational education (18%). In this particular country, any higher level of education improves the labour market chances

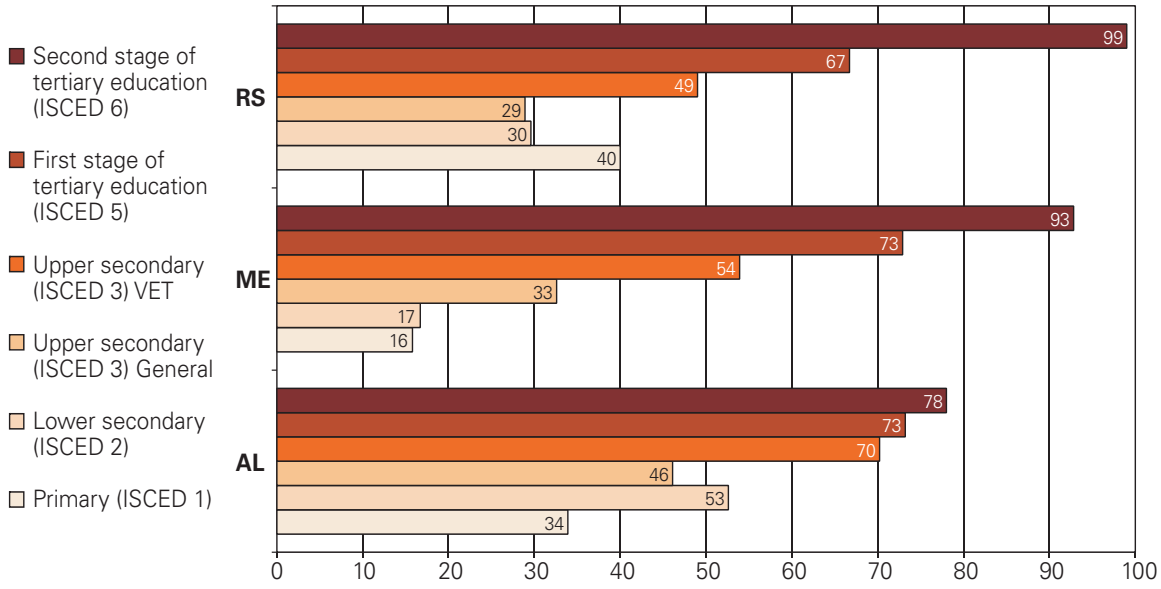
3 The enterprise skills intelligence system is a framework for policy makers, policy practitioners and training service providers in the area of enterprise skills forecast and development, which should subsequently contribute to approximation of enterprise skills development programmes to current and future demand for skills in the business sector.

of individuals, but post-secondary vocational education is particularly positive. 'Over-qualification' has become a source of concern lately, as the share of highly educated people has risen sharply to 15% of registered unemployed individuals and the trend is expected to continue (Golubovic, 2011).

In Serbia 67% of higher education (ISCED level 5) graduates, 49% of upper secondary VET (ISCED 3) graduates and 40% of people with primary education are employed. Employment rates are lower for people without education (17%), lower secondary (ISCED 2) education (30%) and upper secondary general education (29%). People with no education are the most vulnerable to unemployment (41%), followed by people with upper secondary vocational and general education (25-26%).

In Bosnia and Herzegovina, Croatia, the former Yugoslav Republic of Macedonia, Kosovo and Turkey, people with higher education degrees are most often employed. The second highest numbers of employed people can be found at the upper secondary education level, where the countries mentioned do not distinguish between general and vocational education. Additionally, in Bosnia and Herzegovina and Turkey, almost 70% of people with ISCED levels 0-2 still manage to find employment in spite of the low education level.

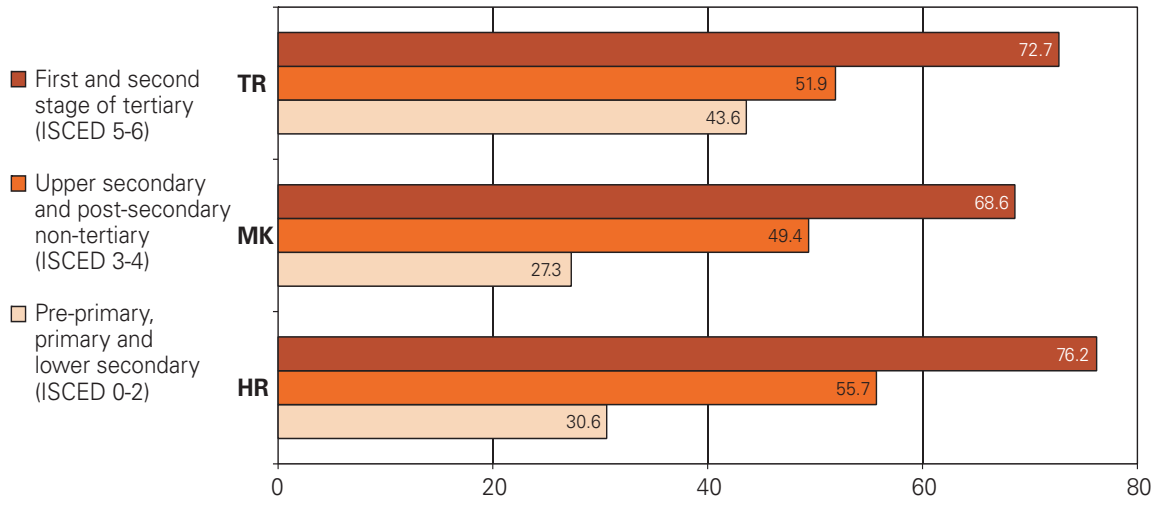
FIGURE 2.5 EMPLOYMENT RATES (15-64) BY EDUCATION LEVEL AND PROGRAMME, 2011 (%)



Notes: AL – data for 2009; ME – data for ISCED 1 include people with at least six years of school, but not completed basic education and people with basic education.
Sources: AL – INSTAT, LFS; ME – Monstat; RS – SORS-LFS

Patterns in unemployment as a rule show people with lower education levels most affected across all countries, although in Bosnia and Herzegovina and Turkey, low-skilled people still find jobs more easily than groups such as general secondary graduates as they are more likely to accept informal jobs and/or lower wages (Ercan, 2011a). Ercan (2011b) reiterates this point in a recent occupational outlook for Turkey, where he argues that low skills, especially in rural agriculture or as urban seasonal day labour in the construction and tourism sectors, will continue to be in demand in considerable proportions until 2020, at least for male workers. Hence, in Turkey, low-educated and high-educated or vocationally skilled people can, as a rule, find jobs. The problem lies in the middle range, where graduates of general secondary education, and female graduates in particular, would look for work or where the vocational skills obtained are not in line with employer expectations (Galal and Reiffers, 2011).

FIGURE 2.6 EMPLOYMENT RATES (15-64) BY EDUCATION LEVEL, 2011 (%)



Source: Eurostat online database

In most countries of the region, both higher education and vocational education, at upper secondary and post-secondary (where this exists), provide better employment prospects than the other education levels. The exceptions to the rule are Bosnia and Herzegovina, Serbia and Turkey where between 70% and 40% of people with primary education are in employment. Unemployment falls hardest on people with primary education or less, with the exception again of the three countries mentioned.

Skills mismatches continue due to the incomplete overhaul of VET qualifications and programmes

The Western Balkan countries and Turkey have made considerable efforts over the last decade to adjust VET provision to new labour market and social requirements. New VET profiles have been developed for the business education, IT, construction and tourism sectors and computer and entrepreneurship competences have been integrated into curricula in all countries, either as separate subjects or as horizontal elements. Teachers are trained on how to develop core competences through active teaching and learning techniques with the assistance of donor experts.

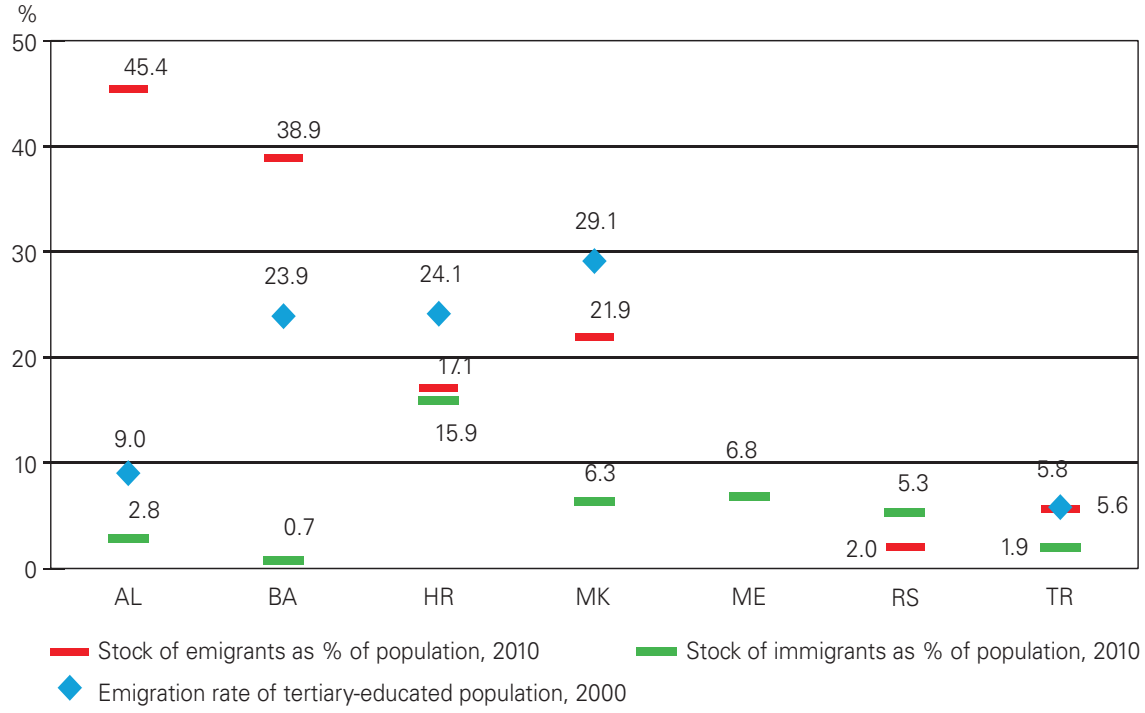
However, there is still an enormous amount of work to be done as the total overhaul of VET profiles and programmes on the basis of labour market and skills projections is a large-scale undertaking that requires considerable research and development expertise coupled with financial and coordination capacities – a point particularly stressed by Nikoloski (2012). The issue is exacerbated by the relative inertia of VET planning systems within which education ministries plan initial VET principally on the basis of historical enrolment data. Local and regional actors are occasionally consulted on issues related to the allocation of students and curricula design, and this has led to a number of adjustments, though change is slow and has not yet been far-reaching enough for schools to offer what employers require rather than what the schools themselves prefer to offer. As a consequence of expertise and resource constraints and slow transformation, the profiles of school or university graduates do not always match those required on the labour market, meaning that this area remains a challenge across the countries.

Labour migration adds to skills shortages

A specific issue common to all of the Western Balkan countries and Turkey to varying degrees, is a labour migration process that is widening the skills gap. In 2000, when the effects of the Balkan conflict were still strongly felt in the area, people with higher education degrees emigrated en masse, with Bosnia and

Herzegovina, Croatia and the former Yugoslav Republic of Macedonia losing as much as 23.9%, 24.1% and 29.1% of this group respectively. In 2010, almost half of the entire population of Albania were temporary migrants, as were well over one third of people in Bosnia and Herzegovina. The situation was far more contained in Turkey, and the number of returning migrants still exceeded the number of emigrants from Serbia.

FIGURE 2.7 MIGRATION (%)



Source: World Bank, Migration and Remittances Factbook 2011

From 2005 to 2010 net migration dropped drastically in almost all countries, indicating some degree of stabilisation of the situation across the region. There has even been an inversion of the migration flows in Croatia and the former Yugoslav Republic of Macedonia. The exception here is Bosnia and Herzegovina, where the influx of war refugees returning to the country in 2005 slowed and the figures swung back to net emigration (see Figure 2 in annex).

Despite the change in figures, the phenomenon is far from being a thing of the past, with World Bank estimates for 2012 stating that 20% of people aged 25 or older with tertiary education from Bosnia and Herzegovina currently live in one of the Organisation for Economic Cooperation and Development (OECD) countries and not in their country of origin. In the former Yugoslav Republic of Macedonia, more than 25% of companies surveyed for the OECD Review of Innovation Policy in 2010 (published in 2011) reported at least one technical or scientific member of staff emigrating in the last three years, and 20% of the same sample of companies considered the brain-drain of skilled employees had disrupted company activities (Ercan Su et al., 2013).

Skilled labour circulation is a deliberate EU policy that can enhance skills, investments and business development in the sender countries. However, if migrants do not eventually return, these countries are deprived of an essential part of their human resource potential as the domestic population ages.

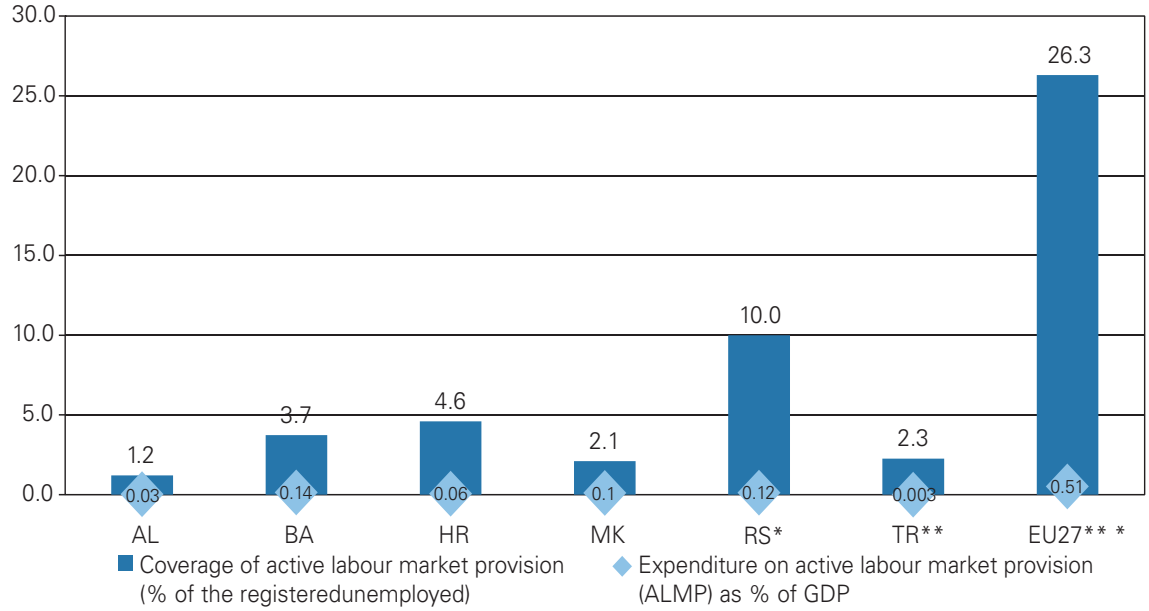
Related problems such as considerable permanent internal migration towards capital cities or other more prosperous areas and seasonal migration in the tourism and construction sectors only compound the situation, contributing to imbalances such as the over- or under-supply of labour and skills. In countries such

as Albania, mass internal migration to Tirana and Durres has left these cities with unprecedented infrastructure, education and labour market problems, while more rural or mountainous areas have become increasingly depopulated.

Unemployment is often linked to a lack of skills, while labour market training provision is limited

All countries offer vocational training, re-training or upskilling in various basic or generic skills as part of their active labour market measures. Unemployed individuals are given training for specified or unknown employers, within training institutions or in the workplace, in combination with subsidized employment schemes. Some countries of the region have specifically targeted training for first labour market entrants – including school or university graduates lacking practical employability skills. Although the measures and numbers of participants have increased in some countries, it can be argued that the provision falls far short of the actual need. Expenditure on active labour market measures remains modest, and coverage of unemployed jobseekers ranges from 1.2% in Albania to 10% in Serbia, against an EU average of more than 26% in 2010. However, these data do not include donor funding or people participating in specific donor-funded activities, so the real situation will be slightly better than the official figures suggest.

FIGURE 2.8 ACTIVE LABOUR MARKET PROGRAMMES, 2010



Notes: In this context, ALMP comprises: training, job rotation and job sharing, employment incentives, supported employment and rehabilitation, direct job creation, and start-up incentives; (*) exact data missing; (**) 2008; (***) EU-27 is calculated as an average of national data; UK missing in expenditure % and 12 out of 26 national data classified as 'unreliable' in coverage. Sources: ETF inputs to European Commission's progress reports 2012 on the different countries (unpublished), using national statistical offices or labour ministries/public employment services as sources. EU-27 – ETF calculation on Eurostat, statistical books, 'Labour market policy – expenditure and participants', 2010 data

On the other hand, there are a number of critical demand and supply side factors that make the activation of registered unemployed people very difficult and expensive. Demand-side issues include a slack labour demand in the formal sector, a low level of job creation and a resulting lack of vacancies. Another factor impeding activation is the fact that some people manage to make ends meet by combining social benefits with income from informal work; a situation that will only be overcome with concerted action between various government departments across a number of economic and social policy areas. On the supply side, the biggest challenge is the low skills levels of the working age population, particularly the long-term unemployed and inactive people (Crnkovic-Pozaic and Feiler, 2011). The low skills issue can only be resolved by an intensification of training measures, for which top up funding may be allocated through the upcoming IPA HRD programmes.

Reducing skills mismatches is dependent upon better information and continuous investments in modernising VET – including higher levels and adults

All countries stress the importance of making education and training more relevant to the labour market in their VET, higher education and adult learning strategies. At the same time, none of the countries currently has a comprehensive skills forecasting system in place to analyse economic and skill development trends and to inform mid- to long-term VET planning. The national or regional economic development strategies could be used as an appropriate starting point from which the overall human resources development needs could be derived.

Reducing skills mismatches is reliant upon better links between the worlds of education and business and can be achieved by:

- drawing together skill needs and labour market information from various sources with a view to adjusting VET offer – sector councils involving the economic social partners, businesses, PES counsellors and researchers could be established or strengthened, following the examples of Croatia, Turkey and Serbia, more recently;
- continuously investing in teacher training and modern VET provision, promoting better collaboration between schools and businesses with the aim to ensure the provision of high-quality practical training;
- creating possibilities for learners to progress on to higher levels of professional education or higher degrees of specialisation at any time in their working lives;
- enhancing opportunities for adult training, including the most disadvantaged groups of the population such as first labour market entrants, women, low-skilled jobseekers, people living in rural or isolated areas, people with disabilities and specific ethnic groups.

Training support must be better tailored and 'packaged' with job-tasting and insertion measures

These countries are well aware that budgets and PES staff capacities need to be increased and training, measured in terms of job placement rates, must be made more effective. The courses must provide the skills needed by the labour market and, for this approach to be successful, they must be implemented in close cooperation with employers. There is the additional issue of the tailoring and 'packaging' adult training support to include job-tasting or insertion measures that will allow people to enter or re-enter the labour market and society. This is one of the key concepts at the heart of the European Social Fund; the principles and mechanisms of which are being embraced through the accession process.

3. ADDRESSING SOCIAL DEMANDS

Profound economic and social changes in the Western Balkans and Turkey have resulted in great inequities in access to and participation in education, training and employment for identified vulnerable groups. Skill mismatches have arisen as a consequence of these structural changes, giving rise to long-term unemployment, poverty and social exclusion for young people and older workers alike. Although skill mismatches should ideally be addressed by VET, national systems have fallen behind in equipping the most disadvantaged groups with appropriate skills. The systems consistently fail to support the social inclusion of individuals and social cohesion as a whole despite high rates of vocational school enrolment in some of the countries (VET enrolment rates in the region at ISCED level 3 range from a low of 16.3% in Albania to a high of 76.2% in Serbia).

The key finding of the Torino Process country reports is that VET often suffers from a poor public image and low status. In most cases, the VET sub-system is isolated from the mainstream academic education system in a way that results in 'dead end' programmes and qualifications with low labour market relevance.

The issue of gender imbalance is an important barrier to social inclusion in VET systems in these countries, varying in extent depending on the country. In most countries, a higher share of male than female secondary school students are enrolled in vocational school tracks and this type of education tends to cater for a disproportionately high percentage of learners disadvantaged on the basis of socio-cultural background, economic circumstances, and physical or mental disability. Many of these students are hindered by an impaired capacity for learning which has implications for their future employability.

Some groups of young people are even worse off, and are likely to miss out on VET entirely. These include members of the most economically, socially and politically marginalised groups such as individuals with disabilities, women, certain ethnic groups, those still living at home, from single-parent families, living in rural areas and from families with a history of parental illiteracy and unemployment.

Students from categories at particular risk (e.g. students with disabilities and serious health problems, students from rural, isolated and inaccessible areas, the internally displaced, ethnic and cultural minorities) are overrepresented in the VET system.

It is important to stress that VET therefore has to provide both employment orientation and compensatory and/or remedial learning opportunities to counteract the 'baggage' of obstacles to social inclusion carried by learners from vulnerable groups when they enrol in programmes. This education stream must also provide the necessary guidance and counselling services needed to address the specific individual needs of these learners.

This dichotomy, poses immense challenges to vocational schools compelled to prove efficacy through success rates in enrolment, retention, completion, qualification attainment and transition to the labour market, whilst also fulfilling their equity obligations. In practical terms, they are presented with tough decisions to make on issues such as: use of resources; staff profiles and in-service training needs; and the timetabling of programmes to ensure VET qualification/examination requirements are met. Unless vocational schools are guided by robust policy, are well managed and resourced and can access supportive external services, there is a tendency for one goal to rise to the fore above the other, with negative consequences for the set of learners with primary needs in the other priorities.

Tackling social exclusion requires a commitment to excluded populations from stakeholders and society as a whole. The whole issue must be brought to the surface, made visible and given due recognition before it can be adequately addressed.

Some population groups face particular skills needs

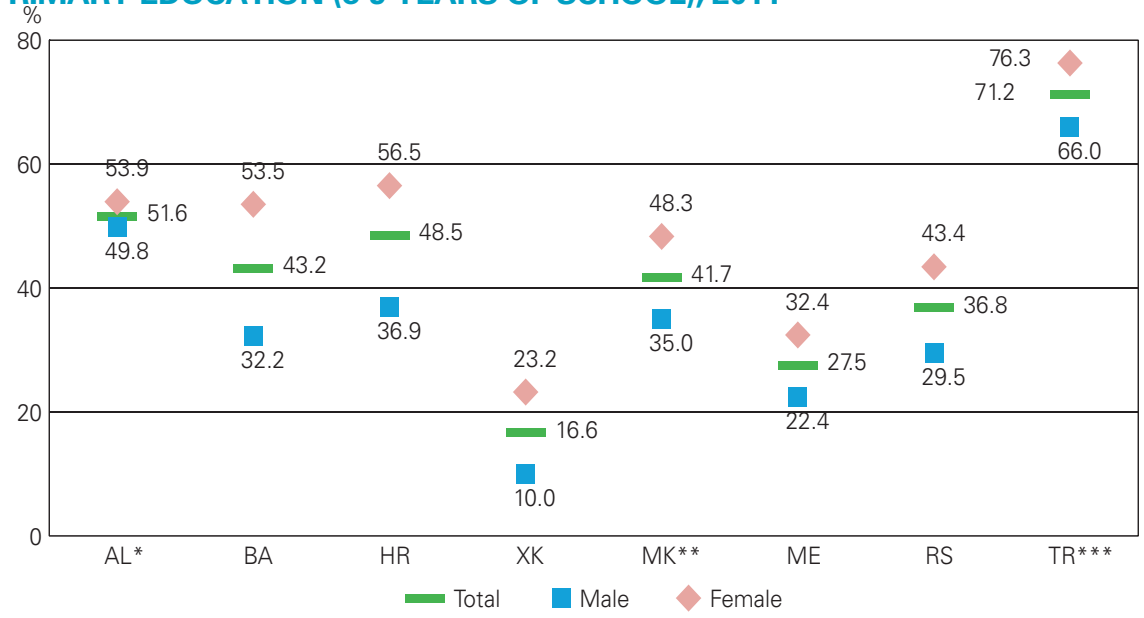
Young people and women in particular population face the problems of labour market integration discussed in Chapter 1. Other disadvantaged groups include low-skilled sections of the population (see also Section 5.5), people with disabilities, members of certain ethnic groups and people living in rural or isolated areas – such as mountains or islands or on the outskirts of big cities – where there is inadequate infrastructure. Under the Decade of Roma Inclusion 2005-15, national action plans are being implemented to support Roma, Ashkali and Egyptians groups primarily on the basis of donor support.

With the exception of Croatia, only limited measures have been offered to meet the specific skill needs of disadvantaged people, as government budgets are tight and a relatively large number of people need these services. Major resourcing issues must be overcome if countries are to reach out to the people concerned and offer training incentives that will be able to assess the skills of individuals, design and implement personal development plans with the help of trainers and coaches, and provide support beyond the actual learning process. Plans like this would imply additional costs for transport, learning materials, childcare and, in some instances, even clothing and food. To be effective, policies to help disadvantaged groups develop basic, work and life skills would also need to be consolidated by tools to support their transition to gainful economic activity. Such a plan would undoubtedly be costly, but could be a priority for funding in the upcoming IPA HRD programmes.

Basic skills programmes exist for adults but must be expanded to target the inactive

All countries have engaged in education and training for low-skilled adults, which is a praiseworthy development. Croatia, for example, has launched the Literacy for the 21st Century programme, but participation has been low for many years. Adults are subject to many conflicting pressures in everyday life and may not recognise that they have a skills problem. This suggests the need for various kinds of awareness-raising and outreach activities, including incentives and support beyond the actual learning process.

FIGURE 3.1 PERCENTAGE OF PEOPLE (15+) WITH AT THE MOST COMPLETED PRIMARY EDUCATION (8-9 YEARS OF SCHOOL), 2011



Notes: (*) 2010, 15-74, eight or nine years of school; (**) primary and lower secondary or less; (***) 15-74, primary and lower secondary or less.
Sources: National Statistical Offices, LFS publications; HR – Croatian Bureau of Statistics, Statistical Yearbook of the Republic of Croatia, 2012; XK – Agency for Statistics, Kosovo Population and Housing Census 2011, Final Results; TR – Eurostat, LFS data

In the former Yugoslav Republic of Macedonia, a number of training actions were implemented in regions where low levels of adult education are prevalent. The 2011-15 Government Programme included the establishment of Adult Education Centres to provide second-chance education and training to adults in Prilep, Shtip, Kumanovo, Gazi Baba and Strumica (Ercan Su et al., 2013).

The Ministry of Education, Science and Technology in Kosovo used donor support to organise catch-up classes and intensive education programmes for young adults in a pilot project on capacity development in the basic education sector. Unfortunately, the programme implementation process suffered from poor coordination with municipal education directorates and a lack of capacities at both ministry and municipal levels, meaning that it did not achieve the intended results in terms of returning dropouts to school (2012 Torino Process country report).

The EU-sponsored Second Chance project and the Integration of Minority Groups project in Montenegro were well advertised in advance and learners were paid small monthly allowances. An additional motivational factor was that completion of the course led directly to entry in vocational training in a context where courses outside the formal education curriculum do not normally earn the student a recognised certificate (despite the fact that just such a certificate is required by the employment service and employers before further learning can be accessed).

Turkey's Mothers and Daughters at School initiative, has made great efforts to attract illiterate or low-educated females to its courses. Educational authorities at all levels, other public institutions, NGOs and the private sector were all involved in planning this major campaign for up to three million participants. A leading Turkish bank provided sponsorship for television spots, newspaper ads and posters displayed in bigger towns. Provincial education directorates identified illiterate individuals and contacted them, even making personal introductions in some cases. The campaign was launched at a national event by the Prime Minister, attracting nationwide media attention. Courses and materials are provided free to participants and there is means-tested reimbursement of transport costs. Strong incentives to participation were provided through: promotion of the family learning concept; the provision of course subjects such as family planning, basic life skills, computer literacy and child care – content of essential interest to the target student group; and the prospect of access to a driving course for second-level course graduates.

Projects for adult Roma in Albania, Kosovo, Montenegro and Serbia successfully used trained assistants from within the same community to provide extra support and coaching to resolve the problems of other learners. Serbia has undertaken a thorough evaluation of its EU-sponsored Second Chance project for adult Roma, and has revised the project on the basis of lessons learned, extending the scope to cover a broader range of disadvantaged adults.

An approach based on the elementary education system for children may not be adequate, as low-educated adults will have difficulties with the prospect of several years of study for a formal certificate before even starting more vocationally-oriented courses. Adult education and training should be targeted to the needs of adults in terms of both teaching content and approach. Developing functional reading and writing, applied mathematics, self-learning, basic information technology (IT) and entrepreneurial skills may offer sufficient grounding for further training in an adult learner.

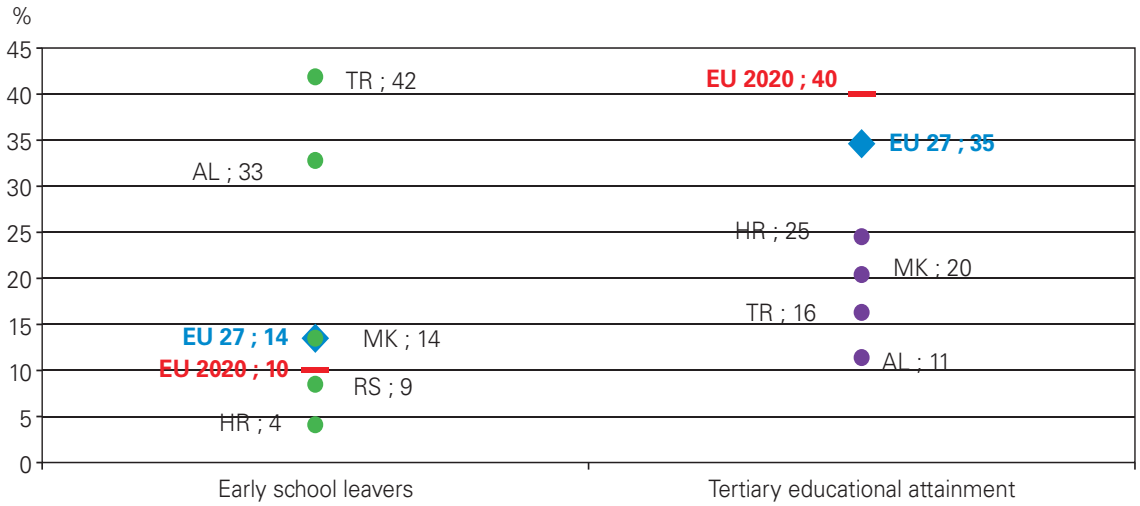
Perhaps the greatest challenge is that adults with lower skill levels tend to be poorly motivated to engage in training, but if the package offered is geared to developing labour market skills and providing a route to gainful economic activity, this may provide stronger motivation.

Further progress in this area could be monitored through the application of a short-term deliverable target related to the use of vocational education as a means of assisting vulnerable groups back into education or on into the labour force.

4. INTERNAL QUALITY AND EFFICIENCY

As with employment and labour markets, the EU provides a reference point for the education and training systems of the region. **Figures 4.1** and **4.2** indicate where the countries of the Western Balkans and Turkey stand in relation to the EU Member States in terms of EU benchmarks.

FIGURE 4.1 WESTERN BALKAN COUNTRIES AND TURKEY AND EU 2020 BENCHMARKS FOR EDUCATION, 2011



Sources: Early school leavers: EU-27, RS, HR, MK and TR – Eurostat (HR = unreliable); AL – LFS 2010. Tertiary educational attainment: 30-34; EU-27, HR, MK and TR – Eurostat; AL – LFS 2010

The comparison indicates that although the countries have been active in education and training policies, significant disparities remain between the region and the EU in terms of relative performance. However, encouragement can be drawn from the fact that the Torino Process revealed a progressive agenda moving the region toward education and training systems with a lifelong learning focus.

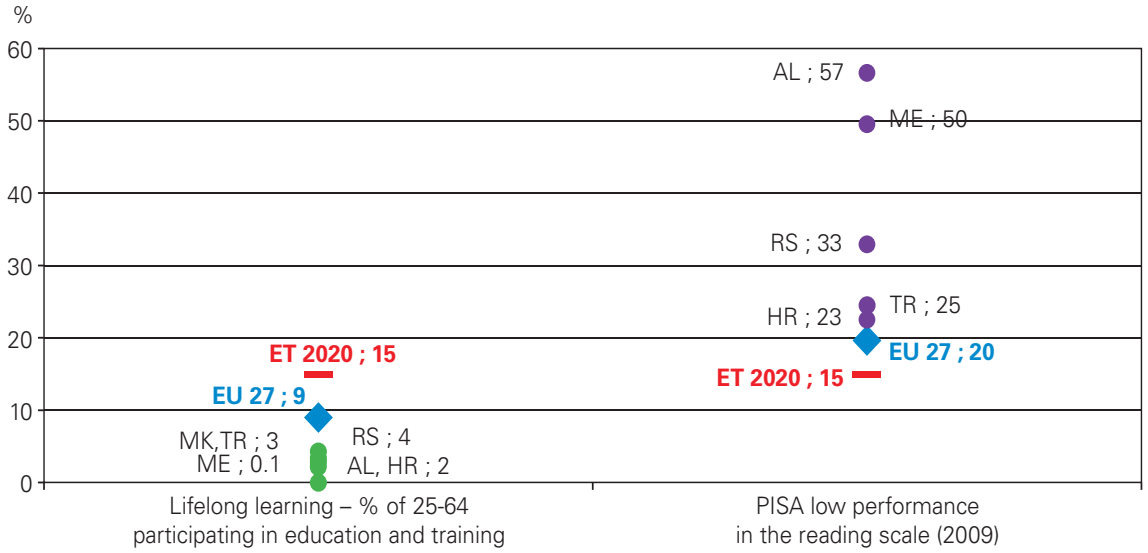
4.1 NURTURING THE KEY COMPETENCES OF EMPLOYABLE, ADAPTABLE LIFELONG LEARNERS

Progress has been made across the countries in language, IT and entrepreneurial skills

In the last decade, the focus on key competences has led to curriculum reforms in all Western Balkan countries and Turkey underpinned by reforms in the legislative and curriculum frameworks.

In Croatia, for example, the VET system development strategy (2008–13), the VET Law (2009) and the national curriculum framework (2010) have all addressed the issue of acquiring key competences.

FIGURE 4.2 WESTERN BALKAN COUNTRIES AND TURKEY AND EDUCATION AND TRAINING 2020 BENCHMARKS FOR EDUCATION, 2011



Note: Net enrolment rate in pre-primary – UNESCO data; share of population aged four years to the age of enrolment in compulsory education currently participating in early education – Eurostat data.
Sources: Lifelong learning: EU-27, HR, MK and TR – Eurostat; AL (2010), ME and RS – LFS. Participation in early childhood education: UNESCO (HR, MK, TR – 2010); EU-27 – Eurostat. Pupils' performance in reading: OECD, PISA 2009 results; EU average refers to the 25 EU countries participating in PISA 2009, it is calculated as a weighted average, where the weighting is the 15 year-old population.

In Montenegro, the new VET curricula introduced between 2004 and 2009 include mother tongue language, foreign language, mathematics and computer literacy as mandatory subjects. In Turkey, since 2004, eight key competences have been included in the national curriculum as the basis for both general education and VET (van Meel and Aribaud, 2012).

Particular emphasis has been placed on the inclusion of entrepreneurial learning in the secondary education curricula in all countries. Serbia, for example, introduced entrepreneurship education into VET pilot curricula and the creation of virtual enterprises forms an essential part of five of the pilot profiles for the economy and trade sector (van Meel and Aribaud, 2012). In the former Yugoslav Republic of Macedonia, following the signature of the Declaration for the Promotion of Entrepreneurial Learning in 2009, all general and vocational schools have begun to implement 'business' as a mandatory subject (Ercan Su et al., 2013) and Albania has turned entrepreneurial learning and career management into compulsory subjects for all secondary school students. The Council of Ministers of Bosnia and Herzegovina has adopted a Strategy for Entrepreneurial Learning 2012-15, targeting all levels of education with the primary goal of promoting entrepreneurial mindsets that positively influence social and economic development (2012 Torino Process country report).

Education for Entrepreneurship (E4E) in Croatia provides a good example of an institutional partnership for lifelong entrepreneurial learning that unites the authorities responsible for the economy, labour and education. The National Strategy of Entrepreneurial Learning 2010–14, adopted in July 2010, and the national framework curriculum aim to introduce entrepreneurship as a key competence in all forms, types and levels of education (Rinaldi et al., 2012). The South East European Centre for Entrepreneurial Learning (SEECEL) co-founded by the Croatian government and supported by EU funds is pushing developments not only in Croatia, but across the region.

The challenge now lies in implementing the related strategies and plans. Schools report that the importance of entrepreneurial learning is widely recognised by teachers and students, but some complain that there is not enough space to introduce new topics because of the heavy teaching load. Other key issues include: the lack of training for teachers (particularly in terms of the teaching and learning methods suited to encouraging creativity and entrepreneurial spirit among learners); insufficient links between education and training and real world problems; and the lack of business community involvement. Many universities maintain a heavy academic orientation with little entrepreneurial spirit. Two measures that could lead to a step change would be the introduction of entrepreneurship education as a cross-curricular principle and the introduction of practical internships in industry. In addition, there is a need for greater involvement from the business sector in teaching and research projects.

IT is another important key competence area where all countries have made considerable progress in the past decade, introducing computers and related subjects in schools. In the former Yugoslav Republic of Macedonia, the government, for example, has invested in the IT infrastructure in schools, the digitalisation of textbooks and learning support materials, related teacher training, the A Computer for Every Child programme and other initiatives. The e-education section of the government programme for 2011-15 is expected to reinforce the measures already launched and introduce e-learning. A University of Information Technologies has also been established to promote excellence in IT education (Ercan Su et al., 2013).

Key competences or basic skills for adults have also been developed in many of the Western Balkan countries and Turkey. Montenegro considers basic education and English, IT and entrepreneurship essential for every citizen, and the respective curricula are being drawn up. In Serbia, an EU-funded basic skills project targeting adult Roma has introduced successful new courses on 'responsible living' and 'basic work skills'; the latter including basic computer skills, seeking employment or self-employment and vocational skills for certain basic occupations. The project was so successful that an adjusted and expanded version was used to address the skill needs of other low-skilled adults in Serbia. The former Yugoslav Republic of Macedonia, meanwhile, has concentrated on adult basic skills training developed within an EU CARDS project focused on literacy, numeracy, entrepreneurship, democracy and IT in a structure that was complemented by basic vocational skills training, where participants could choose from threads such as food processing, hairdressing, electrical installations, bricklaying and embroidery.

Less emphasis has been placed on nurturing learning to learn and other key competences through modern learning techniques

Most countries have recognised the importance of key competences and have taken efforts to develop curricula for designated subjects (e.g. mother tongue and foreign languages, maths, IT, entrepreneurship education), but far less emphasis has been placed on nurturing 'learning to learn' and other general key competences across the curriculum.

These key competences are central to the formulation of learning goals, curriculum organisation, improved teacher skills and teaching methods, and the design of learning sites. Learning goals should ideally be formulated in a problem-oriented manner based on complex and challenging real-life situations. In VET, the competence areas relevant to a chosen occupation or group of occupations would need to be identified in a move away from the general subject-based approach. For example, the competence area of 'entrepreneurship', which is key to a broader range of occupations, could include:

- economic competence, including entrepreneurial thinking and action;
- insight into modern technologies;
- linguistic competence, including communication, negotiation, writing and presentation skills;
- personal competences such as independent working, commitment, initiative, flexibility and team working.

The development of key competences – or professional competence in general – is closely linked to the provision of practical learning experiences for students in classrooms, workshops, company training locations or elsewhere. This will be more fully explored in Chapter 4.

4.2 ENSURING THE DEVELOPMENT OF PRACTICAL SKILLS THROUGH WORK-BASED LEARNING AND APPRENTICESHIPS

Employers in the Western Balkans and Turkey often complain of the lack of practical skills among VET graduates and it is therefore apparent that closer cooperation between VET institutions and enterprises could be an effective strategy for the organisation of work-based learning experiences. In the past, large-scale companies in the Western Balkan countries would absorb people from industrial or agricultural occupations and provide them with further on the job training. However, the transition appears to have removed much of the infrastructure best suited to practical training even though various attempts have been made to further strengthen the practice-oriented parts of VET in recent years, particularly in the more labour-market oriented three-year VET programmes of the former Yugoslav countries.

Most VET programmes prepare students for university entrance rather than the labour market

Four-year VET programmes in the Western Balkan countries have been reformed and on first examination they appear to offer a good model in principle as they provide a dual qualification serving for both higher education and labour market entrance. In reality, however, they are widely viewed as a stepping stone to higher education by students, curriculum developers and teachers alike, preparing students for the state matura (university examination), and are thus oriented toward academic knowledge taken from the gymnasium curricula. Any vocational practice offered tends to be of short duration except for those instances where students undertake practical projects such as the creation of small companies as part of business education programmes. The quality of training provided outside the schools is not monitored by the schools, and employers who hire graduates from these programmes are often dissatisfied with their level of practical skills (Crnkovic-Pozaic, 2009). It might be advisable to upgrade the schools offering such programmes to technical or commercial gymnasia, while strengthening the content and teaching methods to improve links with the world of work and real-life problem-solving approaches.

Only Turkey and Croatia have well-developed formal apprenticeship schemes

Apprenticeship practices range from well-regulated systems, such as those in Turkey and Croatia, to more informal or ad hoc solutions devised by donors or individual schools in other countries.

Turkey has a regulatory framework for the apprenticeship system that has been in place since 1986, and revised in 2001, stipulating that companies with more than 20 employees have a legal obligation to provide work-based learning opportunities to a minimum of 5% and a maximum of 10% of their employees (van Meel and Aribaud, 2012). There are 313 vocational training centres providing training for apprentices in the country, and while apprenticeship training is considered part of the non-formal education system, graduates can obtain official recognition for their skills as they are assessed against the national qualification requirements and occupational standards (Akkök, 2010). All responsibilities are subsumed under the General Directorate of Apprenticeship and Non-formal Education of the Ministry of National Education, which is also in charge of adult learning.

Schemes run in Croatia for work in craft businesses were modelled on the Austrian or German dual system experiences, but Croatian apprentices generally spend less time on practical training and typically feel more attached to their school than the company providing training (Crnkovic-Pozaic, 2009). The dual system of crafts programmes is organised under the auspices of the Croatian Chamber of Trades in 163 crafts schools and over 8,000 companies licensed to provide training. Some 16% of all upper secondary students opt for this track and more than 30,000 apprenticeship places were on offer in the system at the end of 2010 (Rinaldi et al., 2012, p. 26). Crafts apprentices sign a formal contract with the business that regulates their work periods as part of the curriculum. The skills of apprentices at the end of the training are assessed with the involvement of regional chambers of crafts and trades.

Other forms of work-based learning are also available and the Croatian Agency for VET and Adult Education claims that the 2009 VET Act improved the situation for students by making schools responsible for finding work placements, rather than the students themselves. The types of student businesses introduced in business schools in the past six to seven years as a teaching tool are now also used in other commercial programmes (Zelloth, 2012).

An unsuccessful introduction of apprenticeships in Montenegro

Montenegro made an unsuccessful attempt to introduce apprenticeships after the 2002 Law on VET laid down provisions for a scheme that was piloted in 2004-06 for the occupational profiles of hairdresser and car mechanic. Despite high initial interest, employer and student motivation was difficult to maintain and there were further complications with the organisation and financing of the apprenticeship scheme. The scheme was suspended in 2006 and the 2010 amendments to the Law on VET removed all references to it (Zelloth, 2012). Zelloth (2010) cited the heavy administrative and financial burdens on companies due to the full labour rights of apprentices as one reason for the failure, coupled with the lack of faith in a dual system in a country where such an approach was previously unknown. Wallenborn (2011) went even further, claiming that most companies did not really understand their role in dual training and that no capacity-building was organised to supervise training in companies, concluding that extra-systemic drivers for reform require longer time horizons to become effective than can be provided by short-term projects. In the case of the Montenegrin apprenticeship system, some of the key success factors in establishing a dual system – such as the enabling environment and the vibrant private sector with articulated skill demand and strong leadership – were simply not in place (Wallenborn, 2011).

Different forms of work-based learning exist in all countries

No formal regulations for apprenticeships are currently in place in Albania, Bosnia and Herzegovina, the former Yugoslav Republic of Macedonia, Kosovo, Montenegro and Serbia, but entities such as Swisscontact has for many years been successfully running informal apprenticeships within the framework of their KosVET and AlbVET reform projects in Albania and Kosovo, working in areas such as thermo-hydraulic installations.

In Serbia, the draft Secondary VET Strategy 2012-20 envisages some measures linked to work-based learning such as the possible introduction of a master craftsman education thread, including an accreditation system for employers and instructors involved in practical training in companies. In addition, the law may include different measures to foster employer involvement in the planning, design and implementation of VET; the latter in the form of financial incentives for the provision of practical training (Zelloth, 2012). The model of virtual or practice student businesses is popular and has been implemented as a pilot programme in business, tourism and catering schools.

In the former Yugoslav Republic of Macedonia, work is underway in the Ministry of Labour and Social Protection to draft a law on apprenticeships for unemployed individuals (van Meel and Aribaud, 2012). Albania has a similar arrangement in that the PES supports company internships and on-the-job training for unemployed people as one of its active labour market measures. The programme is, however, under scrutiny as there have been reported cases of inefficient use of funds.

National curricula in all the Western Balkan countries and Turkey require schools to provide vocational practice for a certain pre-defined proportion of the total learning time. In Serbia, this accounts for 20-30% of course time, depending on the profile (van Meel and Aribaud, 2012), but some schools find it difficult to comply with this requirement, especially when located in economically deprived areas. In Bosnia and Herzegovina, some forms of work-based learning, i.e. internships or virtual or practice firms organised as pilot initiatives, are in place and an estimated 16-30% of initial vocational students participate. There is a general awareness of the need to strengthen work-based learning but the process is hampered by a lack of incentives in the form of public finances and weak legal regulations, as well as a shortage of employers willing to cooperate (Zelloth, 2012).

Vocational practice in the region can consist of workshop practices, student site visits to companies or work periods during the summer holidays, as is the case in Montenegro and the former Yugoslav Republic of Macedonia. However, summer placements are often unrelated to the occupation covered in the training course. A select group of professions – such as medical personnel of all grades from nursing staff to doctors – belong to a group of occupations regulated by the EU that require regulated internship periods prior to exercising the profession.

An umbrella framework of legislation, standards and accreditation processes is needed

Businesses cooperate very little with schools across the Western Balkans. They claim to have little influence over the professional profiles and curricula offered by vocational schools and they are often not inclined to hire school graduates anyway. Interestingly, in a questionnaire on work-based learning, the Croatian Agency for VET and Adult learning quoted 'the lack of employers willing to provide workplace training' as the most important obstacle to this provision. The Chamber of Economy, in contrast, referred to 'weak links between VET and employers', 'the traditional school-based system' and 'opposition from certain stakeholders' as the leading obstacles (Zelloth, 2012).

Policies and frameworks should encourage both sides to work together with a view to the further development of professional competences and, for that matter, work-based learning. All of the Western Balkan countries and Turkey have declared that they will develop their NQFs and move closer to a competence-based approach. This could provide a basis for employers and the education authorities to cooperate together with the use of legislation, standards and the accreditation of instructors and training sites within businesses ready to offer practical training.

The Serbian Ministry of Education is optimistic that just such a situation can be achieved soon and the PASO model, piloted in Albania to train a number of teachers as liaison officers between schools and businesses, may provide a good means by which to launch and structure cooperation.

4.3 EXPANDING LABOUR MARKET-ORIENTED VET AT POST-SECONDARY AND TERTIARY LEVELS

Individuals and employers seek higher-level professional skills

The skill needs analyses in the Western Balkan countries and Turkey mentioned in Chapter 2 point to a need for higher-level vocational or professional qualifications. The shortage of skilled labour, especially in terms of post-secondary or higher education degree level technicians, specialists or middle level managers, is due largely to the lack of adequate training offer in these areas. Occupations at competence level IV typically involve the performance of complex technical and practical tasks that require an extensive body of factual, technical and process-related knowledge. In addition, skills such as the ability to understand complex written materials, prepare factual reports and communicate with other people in the team are sorely needed. Related knowledge, skills and occupational competence are usually obtained following the completion of a skilled worker or skilled technician profession at secondary education level.

Countries offer various types of courses that may fall into the grey zone between VET and higher education

The Western Balkan countries and Turkey are implementing or planning institutional reforms for post-secondary VET and the interface between VET and tertiary education in general that will address several issues: (i) the current provision from conventional secondary general or VET institutions does not always meet the demands and aspirations of young people, as they consistently seek to continue their studies in higher education institutions; (ii) employers often require higher skills levels, in particular in practical skills, that the traditional schools or academic universities may be unable to supply; and (iii) the socio-economic background of learners or their social context does not always provide equal opportunities

for access to the desired higher level of education, meaning that certain sections of the population may still wish to access this at a later stage in life (van Meel, 2012).

Albania provides an interesting example where, under the Swiss-sponsored AlbVET programme, a university and a vocational school cooperate to deliver a post-secondary IT course for graduates mainly from general secondary schools, with the university delivering the theory and the vocational school the practice (2012 Torino Process country report). However, the model operates outside the current legislative framework on a unique pilot project basis.

In Bosnia and Herzegovina, a new policy dialogue on the need to develop post-secondary VET and higher professional studies, as well as the role of colleges, has been launched in connection with debates on the qualifications framework (2012 Torino Process country report).

The Croatian VET Act 2009 is limited to secondary VET, leaving a gap at levels above ISCED level 3. At the same time, there are advanced vocational schools, such as the Electromechanical Engineering School in Varazdin that aspire to and are capable of developing and providing higher-level VET programmes (Rinaldi et al., 2012, p. 25). Higher education institutions in Croatia comprise 15 polytechnics (veleuèilište) and 30 schools or colleges of higher professional education (visoke škole). Two of the former and 27 of the latter type are run as private concerns charging tuition fees. While the diversity of offers for young people and adults is praiseworthy, Croatia needs to achieve a better balance of public education funding between academically and more professionally oriented education (Rinaldi et al., 2012, p. 30). One impediment to the attractiveness and efficiency of higher professional education is the fact that the first cycle of many newly introduced degrees does not lead to a qualification that is useful for the labour market. Job vacancies are scarce and graduates are frequently rejected on the grounds of insufficient practical skills (Kurelic, 2009).

In Turkey, firms report difficulties in hiring qualified technical staff and the government has voiced the explicit goal of encouraging greater participation in vocational-technical schools. Direct transfers from high school to two-year higher vocational schools (ISCED level 4 post-secondary programmes) have contributed to the increasing popularity of vocational and technical education and a total of 712 schools now offer two-year programmes for students who opt for post-secondary professional education. However, students tend to prefer the general (comprehensive) high schools and will only select the post-secondary vocational programme option if they fail to be admitted to a university programme. At the same time, the vocational component of the tertiary level (ISCED level 5B) has expanded in line with the demand for higher education, as has the role of the Higher Education Council (YÖK) in formal vocational education. There are now around 450 two-year higher vocational schools (MYO), most of which form part of the public university system (Feiler et al., 2013, p. 23). However, many MYOs are poorly equipped and students have little opportunity for practical training. Often the type of MYO available in a region is not matched to local needs, professional organisations are rarely involved in designing or restructuring the curricula and many faculties do not have staff with up-to-date industrial experience (Mikhail, 2006). Employers largely view MYO students as poorly-educated second-class students.

The challenge for post-secondary or higher-level VET goes beyond the issue of providers. Policy should clarify how higher-level VET a can add value in terms of learning and labour market outcomes, as well as in terms of opening new pathways and social mobility in the countries in question. In the Western Balkan countries, the share of graduates from traditional higher education already exceeds the demand for highly-skilled jobs, leading to unemployment among young people who remain outside the labour market. In other cases, higher education graduates perform jobs that require a lower level of qualification or another set of practical skills for which there is no provision under the current system.

Post-secondary or higher VET could fill the gap and multifunctional centres could play a pivotal role

The true strength of post-secondary or higher VET lies in its potential to create labour market insiders through the integration of practice-oriented learning and the creation of mutually beneficial links between universities and/or schools and businesses (van Meel, 2012). A focus on practical learning, using examples from business and training students in real workplace settings, is essential in developing the competences required at NQF level IV.

Post-secondary VET courses typically last two years but the duration could be varied to fit with where the students are placed in the education system, the nature of the target group, and the type of knowledge and skills to be developed. Such courses could be open to graduates from both the secondary general or vocational tracks and an appropriate induction course lasting around eight weeks may be necessary to eliminate the differences. Finally, if countries were to further pursue the route of multifunctional VET centres, these could play a pivotal role in developing higher level VET.

Few people participate in adult training or retraining

Adult learning participation rates across the region remain low and compare unfavourably with EU rates and the EU 2020 target of 15%, with percentages ranging from 0.1% in Montenegro to 4.3% in Serbia for 2011 (see Table 17 in annex). The challenges here are related to underfunding of the system, a lack of availability of relevant providers or courses, poor provision of information and guidance about the courses on offer, and a shortage of incentives or support to encourage participation.

During the economic transition period in the former Yugoslav countries, the responsibility for continuing training was frequently shifted from the state onto individuals. However, only better-off and better-educated people found themselves in a position where they had the motivation to invest in further learning for themselves. Government funding is rarely available for the type of training that low-skilled and jobless people need the most, thus further depriving certain categories of people of better life and work chances.

The situation is not helped by the complexity of an adult learning field that embraces three priority areas in the Western Balkan countries and Turkey: (i) addressing the problem of low-educated, low-skilled people; (ii) labour market training for unemployed jobseekers; and (iii) the training of employed people within and for companies. Low-skilled people are often also unemployed, leading to some overlap between the different areas.

Low skills or low levels of education are a major phenomenon in the population

Educational attainment levels have improved over recent decades, even though some countries saw a sharp decline in enrolment and completion rates during the years of transition, war or civil conflict. In Bosnia and Herzegovina this problem was partly overcome, with support from donors, by a massive training effort for demobilized soldiers straight after the war. However, low skill levels are still a major phenomenon in the region, and the impact of this tends to be underestimated or inadequately addressed by governments.

Studies assessing the functional literacy or numeracy skills of adults have not been undertaken in the countries in question, but when the number of years of school attendance in 2011 is taken as an indicator, the picture is bleak: the percentage of people aged 15 and older with at most complete basic education (eight to nine years) ranges from 27.5% in Montenegro, through 28.4% in the former Yugoslav Republic in Macedonia, 29.9% in Croatia, 36.8% in Serbia, and 43.2% in Bosnia and Herzegovina to more than half of the population in Albania (53.3%, 2008), Kosovo (56.5%) and Turkey (72%)[4]. The share of the population considered illiterate totals 9.2% in Turkey (2009) and between 1.2 and 4.1% in the Western Balkan countries[5]. Turkey has achieved a remarkable 2.3% improvement on its figure in only one year, although more still needs to be done to eradicate illiteracy.

Nine years or less of compulsory schooling are in no way considered sufficient to equip people with the knowledge and skills they need to cope with changing labour market conditions and complex life challenges. The problem often hits the poorest segments of the population hardest and they are often also most vulnerable on the labour market. Employment services have difficulties in matching the low-skilled people on

4 Data refer to the population aged 15 years or older; for Croatia and Turkey the reference population is 15-74. Montenegro and Serbia data refer to 'primary education or less'. Sources: Albania – ETF calculation on LFS 2008; Bosnia and Herzegovina, Kosovo, Montenegro, former Yugoslav Republic of Macedonia and Serbia – LFS 2011; Croatia and Turkey – Eurostat LFS 2011.

5 Source: UNESCO Institute for Statistics (UIS). Data refer to 2009 for Albania and Turkey; 2010 estimations for the other countries. Exact percentages: Albania 4.1, Bosnia and Herzegovina 2.1, Croatia 1.2, Montenegro 1.6, Serbia 2.1, former Yugoslav Republic of Macedonia 2.7, Turkey 9.2. UNESCO (2012) defines literacy as 'the ability to read and write with understanding a simple statement related to one's daily life. It involves a continuum of reading and writing skills, and often includes basic arithmetic skills (numeracy)'.

their register with existing vacancies (Crnkovic-Pozaic and Feiler, 2011). The problem is aggravated when populations are offered little or, in some countries, nothing to compensate for the lack of education and skills in situations where adults have neither the means nor the motivation to return to learning. Intergenerational vicious cycles of vulnerability and deprivation are a common outcome of this situation.

Moreover, school attendance is only an approximate indicator of knowledge and skills. **Table 4.1** benchmarks performance of the education systems in comparison with EU education indicators in a way that illustrates the greater complexity of a problem based on many contributory factors such as: very few four year-olds across the region receive kindergarten education; early school leaver rates are high in Bosnia and Herzegovina, Turkey and Albania; and the 2009 PISA results testify to a relatively poor performance in the reading and understanding of texts and the solving of practical problems in science or maths among 15 year-old pupils from the region.

Low performers in the various science, reading and maths tests total 18-33% in Croatia, 24-42% in Turkey, 33-40% in Serbia, 50-58% in Montenegro and 56-67% in Albania (OECD data), meaning that the low skills problem is likely to persist among broader groups of the population in the future. The severity of the situation, calls for a systemic solution across all levels of the system – from kindergarten to higher education – covering those currently in education as well as those not covered by the system.

TABLE 4.1 WESTERN BALKAN COUNTRIES AND TURKEY AND EU 2020 BENCHMARKS FOR EDUCATION, 2011

	EU-27	EU 2020 OBJECTIVES	AL	ME	RS	HR	MK	TR
Early school leavers % of 18-24 with at most lower secondary education and not in further education or training	13.5	10	32.8 (2010)	15.5 (m) 9.2 (f) (2009)	8.5	4.1	13.5	41.9
Tertiary educational attainment % of 30-34 who have successfully completed university or university-like education	34.6	40	11.4 (2010)			24.5	20.4	16.3
Lifelong learning % of 25-64 participating in education and training	8.9	15	2.1 (2010)	0.1	4.3	2.3	3.4	2.9
Participation in early childhood education[2] (%)	92.4 (2010)	at least 95	54	35.2	52.9	61.0 (2010)	24.2 (2010)	26.1 (2010)
PISA results % of pupils with low performance in the reading scale (level 1 or below) (2009)	19.6[(1)]	less than 15	56.6	49.5	32.9	22.5		24.5

Notes: (m) – males; (f) – females; (1) EU average refers to the 25 EU countries participating to PISA 2009, it is calculated as a weighted average, where the weight is the 15 year-old population; (2) net enrolment rate in pre-primary – UNSECO data; share of population aged four year to the age of enrolment in compulsory education currently participating in early education – Eurostat data.
Sources: Early school leavers: EU-27, RS, HR, MK and TR – Eurostat; AL – National Statistical Office; BA – UNDP, National Human Development Report 2007; ME – UNDP, National Human Development Report 2009. Tertiary educational attainment (30-34): EU-27, HR, MK and TR – Eurostat; AL – National Statistical Office. Lifelong learning: EU-27, HR, MK and TR – Eurostat; AL, ME and RS – National Statistical Office. Participation in early childhood education: UNESCO; EU-27 – Eurostat. Pupils' performance in reading: OECD, PISA 2009 results.

Limited progress in skills assessment and recognition

Across the region, final exams for initial VET are still, by and large, handled internally by the vocational schools themselves, with notable exceptions in the dual systems of Croatia and Turkey (where chambers or employers' representatives organise and sit on exam boards) and the new vocational qualifications system for adults in Turkey.

In Montenegro, cooperation between schools and employers works well for the catering, sales, tourism and services sectors, but not for other streams, and in Serbia, employer representatives have joined the final examination committees for initial VET. In the former Yugoslav Republic of Macedonia and other countries, students must deliver a final product as part of their assessment and business representatives are encouraged to sit in on school committees to test students' skills.

Turkey has a new system of vocational qualifications for adults that systematically promotes the validation of non-formal and informal learning through authorised sector assessment and certification bodies, but only limited progress has been made in the rest of the region in terms of the assessment and recognition of skills acquired from any source other than courses leading to certification of some sort. This is incongruent with the importance given to the official recognition of skills in many strategic documents, especially those referring to returning migrants. By and large, there is still a heavy focus on the attendance of formal or ministry-approved non-formal courses and most countries have not yet fully established nationally approved qualifications systems against which skills could be assessed or the institutional structure for independent skills assessments.

4.4 STEPPING UP EFFORTS TO ENHANCE THE SKILLS OF VET TEACHERS AND INSTRUCTORS

Developing capacities for change and adaptation means changing the roles of teachers and learners

It is commonly recognised that vocational teachers and trainers play a key role in creating a well-trained, employable and adaptable workforce. The roles of teachers and learners must be altered in order to inculcate capacity for change and adaptation alongside lifelong, self-directed learning (Nielsen, 2011a). This essentially means a shift to active learning techniques, involving the learner as a participant and making the teacher into a facilitator of learning processes rather than a mere transmitter of knowledge. In the countries in question, VET also needs schools and teachers to cooperate better with parents, employers and other local stakeholders and to extend the range of their provision to cover both young people and adults.

The recruitment, training and work of vocational school teachers and trainers are core topics in VET strategies and VET policy analyses such as the 2008-13 VET development strategy in Croatia or the 2010-14 VET strategy in Montenegro, while Turkey is leading the game with the establishment of a vocational teacher training committee involving the Ministry of Education and the Council of Higher Education in 2008 (van Meel and Aribaud, 2012).

But despite all the rhetoric and strategic plans, VET has failed to achieve sufficient social recognition to attract highly motivated vocational teachers with the competence levels desired, and recruitment is not based on the mastery of pedagogical and occupation-related skills in all countries. Also, while more intense training for vocational teachers and teacher trainers has been widely called for, the issue of their necessary professional competence has not been addressed in a systematic manner. Teachers still mostly rely on the traditional model of frontal teaching where the teacher primarily concentrates on the transmission of factual knowledge while student inquiry and initiative remain rather neglected. Earlier analysis by Bejakovic and Lowther (2004) provides evidence of just such an approach in part of the region, stating that Croatian education is too subject-specific, learning too passive and teacher-dominated, and teachers not properly trained.

In their pre-service preparation, as a rule, vocational teachers read technical subjects in parallel with or consecutive to pedagogy. In Serbia, for example, the 2009 Law on the Fundamentals of the Education System requires all vocational teachers from the 2011/12 academic year onwards to complete a pedagogical qualification worth 36 credit points on top of their specialist studies. One particularly positive element of this is that six credits must be obtained from teaching practice in a vocational school, supervised by a mentor (Klenha et al., 2010).

In the past, Turkey had a four-year vocational teacher education programme that integrated occupational and pedagogical subjects. However, this was abandoned due to the fact that less than 5% of graduates were able to find a job as vocational teachers, leaving them at a disadvantage when forced to compete against fully trained professional individuals, such as engineers, for other jobs on the labour market. As a result, the new vocational teacher education model followed the pattern of the other countries with a consecutive structure that added a one-year pedagogical course after four years of specialist studies (Nielsen, 2011b).

In-service training for vocational teachers and trainers varies significantly across the region. For example, in Croatia, the former Yugoslav Republic of Macedonia and Serbia, national VET or education agencies compile and publish annual lists of upcoming opportunities for in-service teacher training in the form of 'training catalogues' for courses provided by accredited public or private providers. Additionally, in Croatia, formal regulation is in place for training on-the-job trainers in the dual system of the crafts sector. In Albania and Kosovo, state agencies have almost no funds earmarked for vocational teacher training, although on-the-job training is organised for teachers from various schools for certain occupational profiles by Austrian, German and Swiss-funded projects in Albania, Bosnia and Herzegovina, Kosovo and Serbia. While these initiatives are extremely useful, they hardly ever transcend the pilot sector and pilot school level.

The 2012 Torino Process report for Bosnia and Herzegovina states that one of the main problems is that the newly developed VET curricula are being implemented sometimes with inadequate prior teacher training. The exception to this rule occurred in the pilot vocational schools; a sector that underwent a major capacity development drive, with teachers trained to design and work with modular curricula. Further potential for peer learning and support is envisioned in implementation of the Strategy for Entrepreneurial Learning, where teachers would be trained on problem-based, student-centred and creative approaches.

In-service training seminars and workshops organised by the education ministry in Turkey are said to be relatively ineffective as they provide little opportunity for practice, follow-up and reflection. Teachers view these programmes as unrelated to their needs and poorly implemented, lacking the career planning opportunities and other incentives required for a real reform process. As a result, 'the quality of education delivery is heavily influenced by traditional teaching and learning methods, poorly motivated teachers, ineffective teacher training, low quality and restricted access to teaching materials, and poor infrastructure in some regions' (Feiler et al., 2013, p. 9).

Vocational teachers generally complain of a lack or insufficiency of relevant training courses related to their professional development needs. Too little on-the-job training takes place, and where initiatives do exist, they are often isolated and overly focused on compliance with bureaucratic requirements, rather than the development of effective practice.

The Competence Framework for VET Professions as a point of reference

Overall conclusions for the Western Balkans and Turkey suggest there is a lack of the type of competence standards and systematic high-quality pre-service and in-service training provision for vocational teachers that is crucial to improving the quality of VET in close cooperation with enterprises. Holistic professional competence should be a central element for every vocational teacher or trainer and the Competence Framework for VET Professions – a joint publication by Cedefop and the Finnish National Board of Education (Volmari et al., 2009) – could be a helpful inspiration in designing or adjusting curricula and training programmes and encouraging networking and collaboration within and between VET institutions, with local and regional stakeholders and with the world of work.

Continuing professional development should build on peer learning activities

As the countries face such difficulties in the provision of integrated pre-service vocational teacher training combining the chosen occupational area with pedagogical skills, the emphasis upon the continuing professional development of VET staff becomes all the more important. A 2010 UK government white paper on the importance of teaching stated 'we know that teachers learn best from other professionals and that an "open classroom" culture is vital: observing teaching and being observed, having the opportunity to plan, prepare, reflect and teach with other teachers' (UK Government Department for Education, 2010, p. 21) and it is clear that an appropriate teacher training strategy is needed in all the Western Balkan countries and Turkey to introduce incentives for teachers and enterprises to engage in horizontal networking and learning at grassroots level. Teachers working in schools must become familiar with new technologies and work practices – an outcome that should be achievable through better cooperation between schools and employers. Some rare examples of good practice do exist on this front, for example, the School of Electro-technics in Zagreb has implemented several EU-funded projects (CARDS, IPA and Leonardo da Vinci) to improve VET curricula, VET-related extracurricular activities, teaching methods and e-learning methods and has thus gathered the necessary competence to become a reference point for peer learning of VET teachers in the electro-technics field in Croatia.

A further new and promising approach can be seen in school-based competence development of vocational teachers, organised through horizontal learning in networks with the support of national VET agencies. Groups of school managers, vocational teachers and trainers from within one school, or teachers of the same VET subject areas from different schools, would come together to share common practices, organise workshops or company internships in a manner that would build greater competence and develop new practices. This notion is similar to that of the 'subject councils' in the former Yugoslav countries; a concept that could be revitalised to deal with the issues facing vocational teachers and trainers from specific occupational clusters.

While company training levels are low, business clusters and voucher schemes could help boost training

Little information is available on the training provided in or for companies; an element that is of key importance in the field of training adults. In the EU, an average 61% of all companies with 10 or more employees engage in training, although the figure varies widely between northern and southern EU countries (Cedefop, 2010). Evidence from the Western Balkan countries and Turkey in comparison, suggests that few companies provide training and that most of these are the bigger, export-oriented companies. For example, the 2009 World Bank Demand for Skills Survey showed the former Yugoslav Republic of Macedonia had a low overall incidence of training provision at only 23%, an outcome possibly due to the fact that the bulk of the enterprise structure is formed by small and micro businesses less likely to invest in training (Ercan Su et al., 2013).

Further reasons why companies do not train include the lack of human resources development departments or experts within companies, the option of recruiting rather than training staff, as well as the lack of both resources and training offers considered relevant by companies.

5. GOVERNANCE AND FINANCING

5.1 OVERCOMING FRAGMENTATION IN VET SYSTEM MANAGEMENT

Management and coordination of vocational education in the region is based mainly on public administration. In general there is a significantly wide distribution of governance between different agencies in a manner that may be largely to blame for the underdevelopment of comprehensive visions for VET in policy planning.

In general vision, strategies and legislation tend to be fragmented and there is a complex landscape of national councils and agencies dealing with specific sub-systems or aspects of education or training. In addition, some key functions of VET management and development are not clearly defined or may even be missing.

In Albania, for example, challenges to overall VET system management include the fact that the various aspects of VET and VET institutions are not regulated by one comprehensive law but by separate laws on the pre-university education system, VET in schools, regional educational directorates, local government units, vocational training centres for adults, the Albanian Qualification Framework, the National VET agency, the inspectorate system, national evaluations, curriculum development and teacher training, and other elements of the education process. In some cases there has been no proper cross-referencing between the various laws, and elements such as a labour market information system to inform VET planning are missing. Other problems include the traditional separation between 'national' and 'local' vocational schools and between vocational schools for young people and vocational training centres for adults, the limited autonomy of vocational schools, unclear or missing elements of by-laws, the lack of consultation and information about new laws, the partial inability of local government units and schools to meet their legal obligations, minimal participation from the private sector, and the exclusion of regional councils in VET governance.

Bosnia and Herzegovina faces particular challenges due to its complex governance arrangements. A state-level framework law on VET was adopted in 2008 but, up until now, only the Republika Srpska, the District of Brcko and four of the 10 cantons in the Federation of Bosnia and Herzegovina have adopted new VET legislation, harmonising it with the state-level framework. Support for implementation of the laws is also an issue, and the involvement of all Pedagogical Institutes in charge of curricula, teacher training, supervision and evaluation is required along with the education inspectors and school actors (Torino Process 2012 country report).

There have however been a number of substantial improvements. The Skills'10 (Beceri'10) project in Turkey has been innovative in that it introduced new governance mechanisms. The project encouraged different institutions to work together, including the Ministry of National Education, the Ministry of Labour and the Chambers of Industry and Commerce. Furthermore, the project requires the participation of all stakeholders at local level. Local labour market information is retrieved, and course design and management is conducted locally in a way that has helped develop a new culture of collaboration between institutions. As a result, despite criticisms of an undue focus on male-dominated occupations and some degree of low take-up, Feiler et al. were able to argue confidently that this project could form the backbone of effective and inclusive education and training policies at both regional and local levels (2013, p. 47).

The region underwent a period of splitting off some of the specific functions of education and training system governance, placing them under national councils and agencies with narrow mandates, and the region now faces the prospect of some degree of reintegration of these.

In 2010, the Croatian government addressed the problem by merging two previously separate structures into the Agency for VET and Adult Education. However, this particular agency still needs to work on better coordination of work across the two areas in areas such as helping sector councils to develop new

qualification standards and improving the governance of institutions, the development and approval of curricula, teacher training, the inspection system and the issuing of certificates. This is likely to pose considerable challenges as the capacity of the agency is currently assessed as being too limited for the all tasks it is expected to undertake, for example: there are only 13 advisors employed to cover more than 15,000 vocational teachers (Rinaldi et al., 2012, p. 32).

In Chapter 2, the desirability of a single strategy and legislative framework for VET was discussed, aiming to cover young people and adults, all levels of provision and formal or non-formal settings in a lifelong learning context. Both the initial and continuing VET systems could be governed by one national structure based on the many shared aspects such as qualifications, curricula, teachers, providers, workshop equipment, company internships, examinations and inspections. In many cases, it is the 'lighter', less regulated management regime of the adult training system that could inspire better management of the regular vocational school system, rather than the other way round.

5.2 INVOLVING ECONOMIC ACTORS IN DECISIONS ABOUT VET

The many reasons for limited social partner involvement in VET

The social partners – employers' organisations and trade unions – are represented on national VET, adult training and labour councils and the governing boards of national VET, adult education and employment agencies. However, despite widespread representation of employers and trade unions on councils and in working groups, reports from most of the countries state that their role remains limited. The reasons for this are manifold but principally include:

- the high share of small- or micro-businesses and informal firms that emerged after privatisation and restructuring, inadequately represented at national or sector levels;
- low or generic skills levels required by many of these businesses (trade, sales, services) and their lack of plans to train or hire staff in the near future;
- national-level organisations often representing only small sections of employers or employees meaning that representativeness forms a barrier to cooperation with government in councils or committees in most countries;
- uneven distribution of businesses over the country, hindering social dialogue at regional or local levels;
- a lack of human resources experts or people within companies or sector organisations with a vision for training development at company, sector, regional and national levels;
- low levels of unionization, particularly in countries with young populations or large shares of either agricultural workers or migrant workers;
- a preference within companies for their own training (or the hiring of qualified staff) over reliance on publicly funded training institutions they consider to be low-profile, meaning that companies, as a rule, take little interest in public training provision.

In the Western Balkan countries the social partners are generally more interested in protecting the interests of their members, meaning, for instance, that employers are keener to discuss labour regulations or fiscal issues, rather than the education or employment policies that have traditionally been seen as the responsibility of the state. Very often, the role of social partners in education and training is confined to their participation in national tripartite structures that cover basic VET for young people and adults, but rarely extend to higher education, including higher professional education.

Good examples exist of employers sharing in the definition of qualifications or VET delivery

Turkey has shown exceptional progress, with employers taking an active role in areas such as the initiation of processes to define qualifications at sector level. In the Western Balkan countries, in comparison, only certain branch employers' associations are active, as is the case of the construction industry. This particular sector experienced a long boom period that led to a shortage of personnel and as the vocational school

graduates lacked hands-on experience with the latest construction materials and technologies, the construction employers started to collaborate with VET actors.

The Initial Agreement on Social Partnership in Albania, signed by the education and labour ministries, the national VET agency and all key social partner organisations in April 2010, provides a good example of specifying the potential roles of all members. However, the lack of progress thereafter has also shown that tripartite structures need formal rules, guidelines, procedures and coaching for them to be successful. Furthermore, a permanent secretariat and some degree of resourcing is required to keep the process alive, with the secretariat responsible for organising meetings, setting up sub-councils or expert groups, and monitoring, disseminating and reporting on the work undertaken (Viertel and Nikolovska, 2010). In addition, an EU CARDS project in Albania produced a model for public-private partnerships and trained 12 vocational teachers to act as coordinators for social partnership (so-called PASOs). They helped change the attitude towards social partnership, started to identify businesses for a more structured cooperation approach, and developed networking and communication skills, although cooperation with school management was not always straightforward. Also, as this function was not expressly institutionalised, PASOs lacked resources, including budgets for travel and other expenses. However, a more sustained and expanded version of this model could give a great boost to the establishment and monitoring of school-business relationships.

This position is supported by the findings of the Swiss-funded KosVET and AlbVET projects that demonstrated cooperation between schools and businesses does not solely depend on national actors and the existence of a fully developed legal framework, but rather on the initiative of individual school directors, teachers and employers.

5.3 PARTNERSHIPS FOR HUMAN RESOURCES DEVELOPMENT AT REGIONAL LEVELS

Empowering regional actors is emerging as a new pivotal strategy

The Western Balkan countries and Turkey show significant variance from one to another and regional development is increasingly recognised as an essential component of national economic competitiveness and social development that requires coordinated policies including HRD as a key element. Addressing HRD policies from a regional approach can increase their effectiveness by ensuring a better match between skills supply and demand, and by mobilising local stakeholders aware of their own needs to engage citizens and find more inventive local solutions: an approach that implies the active participation of regional and local actors in the design of education and training policies (ETF, 2012).

Croatia and Turkey are more advanced in terms of establishing regional HRD partnerships

Most countries in the region have delegated authority for the implementation of national policies on education and training to the sub-national levels.

Countries such as Croatia are more advanced in establishing regional councils, regional development agencies and centres for entrepreneurship, developing plans for regional development – including HRD measures, decentralising budgets and earmarking funds for priority regions. A good example of this can be seen in the Local Partnerships for Employment established by the Croatian Employment Service and subsequently supported by two EU CARDS projects in eight of Croatia's 21 counties (Sisak-Moslavina, Šibenik-Knin, Vukovar-Srijem, Zadar, Brod-Posavina, Karlovac, Lika-Senj and Pozega-Slavonia) (Rinaldi et al., 2012, p. 54). The aim of these local employment initiatives is to strengthen cooperation between local authorities, employment services, training providers, employers and entrepreneurship centres through the creation of more formal partnerships and the clear formulation of the roles and outcomes of contributions from every partner. An IPA 2010 project extended the partnership initiative to cover the remaining counties in Croatia. Partnerships such as this can bring national, regional and local strategies and resources under one

planning, implementation and monitoring framework with the ultimate aim of bundling and targeting initiatives to help people integrate into the labour market.

Turkey has many regional and local government organisations and boards active in the design and implementation of central policies at regional and local levels. The government's National Development Plan sets out specific Employment Pacts and the Regional Development Agencies, legally established in early 2006, coordinate work under these formalised Pacts through agreements with local and regional governments, employers' associations and trade unions, political groups, community-based and non-governmental organisations. In 2011, as part of the Social Support Program (SODES) the Turkish government supported a total of 1,660 projects in 30 Turkish provinces with a total budget of TRY 200 million (approximately EUR 85 million).

SODES projects aim to increase employment, address poverty issues and support social, cultural and artistic activities at local level. Provincial Employment and Vocational Training Boards convene under the chairmanship of the governor with a membership made up of mayors, provincial directors of education, industry and trade, the public employment service ÝÞKUR, the head of the provincial chamber of commerce and industry, representatives from each trade union confederation, employer's union confederations, the confederation of disabled people, NGOs representing disadvantaged groups, the head of the provincial tradesmen and artisans union, as well as researchers and experts in related areas. All of the Board members are involved in project design and implementation (Feiler et al., 2013, p. 47) in a mega programme that provides excellent examples of how regional and local partnerships are mobilised for the benefit of regional economies and the people living in them.

Regional action to be inscribed in national policy and institutional frameworks

Clearly defined institutional settings or national frameworks for regional action are still absent, or not coherently articulated with other public policies in the remaining countries. This reduces the capacity of regional actors to participate effectively in policy development and implementation and demands a more integrated approach.

Actions are needed to support partnerships at regional levels, develop the capacities of regional actors and link skills development strategies to regional development for more efficient education, training and employment policies. Providing direct support to regions can encourage innovative approaches that could in turn feed into national strategic reflections and policies for human resources development (ETF, 2012) in a way that would complement the usual top-down policy-making approach.

The Western Balkan countries and Turkey generally need to strengthen the role of councils or actors at regional and local levels, including authorities, training providers, employment services, social partner organisations or individual employers, community leaders and NGOs by encouraging all partners to collaborate (for example through regional VET councils) and by assigning them greater competence for policy design and implementation. However, the decentralisation of responsibilities would need to be accompanied by the allocation of adequate finances, a comprehensive capacity development effort for local actors, and an agreed framework for quality and accountability assurance.

Empowering regional actors to enhance employment and social inclusion is especially important for countries preparing for accession to the EU, as they will have to embrace the principles and mechanisms of the European Structural Fund.

5.4 STRENGTHENING MULTIFUNCTIONAL VET CENTRES

Establishing multifunctional VET centres may help address governance and efficiency concerns

The establishment of multifunctional VET centres is on the agenda of most of the countries in line with their objectives of improving governance and the effectiveness and efficiency of VET. Such centres could offer long and short courses for young people and adults at different levels of competence, sharing premises, teaching staff and equipment and developing into centres of excellence in different specialist areas.

The 2009 Law on the Foundations of the Education System in Serbia entitles regular schools to run adult training courses. The Ministry of Education has so far established five regional training centres (RTCs) on the premises of existing vocational schools in Belgrade, Bor, Kragujevac, Nis and Zrenjanin. Three more were planned for the end of 2012. The RTCs are in charge of providing specialist training courses for adults, alongside training on key competences, continuous professional development for staff, the accreditation of prior learning, and the provision of information and counselling on adult training. The RTCs have developed some 50 adult training programmes accredited by the Ministry of Education (2012 Torino Process country report).

In Croatia, the School of Electromechanical Engineering in Varazdin and the Technical School in Sisak are good examples of innovative vocational schools that have established effective links with companies in their quest to seek additional funding, provide adult training and engage in EU-funded projects. The School of Electro-technics in Zagreb, cited in an ETF publication by Oldroyd and Nielsen (2010), set up the local CISCO and Microsoft Academies and is becoming self-sufficient with respect to in-service teacher training by regularly sending teachers for industry training in Croatia or Germany (Rinaldi et al., 2012, p. 26).

In its new VET strategy for 2013-20, Albania plans to set up multifunctional centres across the country, with an average of 700-800 full time students and a further cohort of part-timers. The authors argue that such a concentration of students 'would lead to many benefits [including] a more efficient use of human and material resources, more flexibility, more opportunities for the decentralisation of responsibilities, more opportunities for a functioning integration of vocational education for young people and adults, as well as more opportunities for schools to generate some income'. The authors go on to say that all of this would enable other elements of the reform to develop more easily, leading to an increase in the volume of apprenticeships and better integration of theory with practice, improving the reputation of VET and making it more attractive for students. Current plans in Albania include a multifunctional centre for Kamza near Tirana, a migration centre for people from the rural or mountainous areas of the interior.

The establishment of multifunctional VET centres pursues several goals in parallel beyond simple efficiency gains due to the better use of existing resources. New management practices could be trialled in contrast the somewhat more rigid management practices of regular vocational schools. The VET centres could be given greater room for initiative, allowing them to strengthen collaboration with regional and local partners, including employment services and employers. The multifunctional nature of the centre's remit would open up new sources for income generation, a certain amount of which would hopefully be allocated to the school to reward teachers and invest in new equipment, course development and extra activities. The VET centres could offer various generic or specialist skills courses, as well as higher levels of VET, thus contributing to the goal of VET diversification. Teachers would gain from instructing adults who have their own life and practical experiences and cross-fertilisation between the hitherto separate fields of initial and continuing VET would be encouraged to revitalise teaching content and spread more active, innovative learning methodologies. Multifunctional centres could take over important functions in the training of teachers or other staff from different schools.

Governments and employers could use the multifunctional centres as vehicles for strategic investments in VET, promoting the formation of centres of excellence in specific economic sectors. Donors could underpin these efforts by assisting governments with planning and equipment for such multifunctional centres, making them operational sooner.

5.5 THE GOVERNANCE IMPLICATIONS OF NATIONAL QUALIFICATIONS FRAMEWORKS

The establishment or reform of national qualifications systems (NQFs) is on the agenda in all of the Western Balkan countries and Turkey. The proposals follow the demand for modernised vocational qualifications comparable across various institutions within the same country or across borders.

The most important factor for these countries is that frameworks offer the potential for organised collaboration of actors across various sectors or systems in line with a range of regulations, institutions and curricula. Therefore, discussions relating to the NQF and the definition of qualifications have provided, or have the potential to provide, a platform for joint efforts across different government departments, including the various subsectors of education and training. The related processes provide a similar platform for structured collaboration with social partners.

Governments have recognised the need for regulatory frameworks on qualifications

Governments have recognised the need to establish regulatory frameworks to define rules and institutions for the identification, delivery, assessment, recognition and monitoring of qualifications, and to organise access arrangements and credit transfer between the various qualification pathways.

In Albania, the 2010 Law on the Albanian Qualifications Framework (AQF) assigns responsibility for the strategic planning to develop and implement the AQF to the National Council for AQF, which has not yet been established. However, the National Agency for VET and Qualifications has made advances, setting up and resourcing a small unit in charge of developing vocational qualifications. No developments have been made in this field in the higher education area.

In Bosnia and Herzegovina, the VET department of the Agency for Pre-primary, Primary and Secondary Education has drafted VET profiles for agriculture and food processing. Furthermore, the VET Department has evaluated curricula for 36 occupations from 5 occupational families including: mechanical engineering and metal processing; economy, law, administration and trade; catering and tourism; forestry and wood processing; and geodesic and civil engineering, all of which had been partly developed within the framework of donor projects. The overall aim is to systematise the use of modular VET curricula in Bosnia and Herzegovina and a web page (www.vetBiH.org/portal/) has been created and maintained to keep VET stakeholders informed on the latest developments (2012 Torino Process country report). The Baseline Qualifications Framework adopted in March 2011 provides an overarching framework for the whole country, which now needs further structuring through the work of an inter-institutional cross-sector committee capable of building on previous examples of good practice from donors or local initiatives.

Croatia adopted guidelines and legislation to establish the Croatian Qualifications Framework (CROQF). There is currently no lead institution in place and implementation of the framework is coordinated between various ministries. The Agency for VET and Adult Education is in charge of developing vocational qualifications in cooperation with sector committees, coordinating quality assurance processes and managing the national register of qualifications. The NQF will cover all new qualifications for general upper secondary, VET, adult or higher education developed on the basis of learning outcomes. Older qualifications, not based on learning outcomes, will be included in the NQF only after a thorough negotiation process.

In Kosovo, the Council of VET includes an Occupational Standards Committee and a Committee for Exams. According to the 2008 Law on National Qualifications, the National Qualifications Authority (NQA) is in charge of vocational qualifications, the Ministry of Education, Science and Technology (MEST) of general education qualifications and the Kosovo Accreditation Agency (KAA) of higher education qualifications (while level 5 qualifications are a shared responsibility between NQA and KAA).

In October 2008, the government of Montenegro adopted a more detailed strategy for the Montenegrin qualifications framework, defining goals and tasks, and outlining an implementation plan with details of activities, deadlines and the institutions or bodies responsible. The 2010 Law on the NQF places qualifications in 8 levels, and qualifications are described in terms of the theoretical and factual knowledge gained, the manual and thinking skills developed, and the type of competence achieved (independence and responsibility). Each qualification has an assigned credit value (2012 Torino Process country report).

In Turkey, the Vocational Qualifications Authority (VQA) was established by law in 2006 and work has started on the development of national occupational standards and national vocational qualifications for adults in association with representatives from the economic sectors. Various structures have been established, such as tripartite sectoral committees, unilateral (employer or trade union-led) or bipartite occupational standard-setting bodies, and unilateral or bipartite assessment and certification bodies. This new system of quality assured qualifications now forms the integrated Turkish qualifications framework, bringing together the qualifications systems for general education, initial VET and apprenticeships and teacher training with the college and university degree system for higher education. A change in the VQA law in 2011 has turned this organisation into a de facto authority responsible for all qualifications in Turkey, but the definition and attribution of the various roles required in the implementation of the integrated framework are still not fully clear.

Governance structures and the operationalisation of the framework are still evolving

We can conclude that there is a basic similarity in the principal architecture provided to develop and implement NQFs in each country, including national qualification (or VET) councils, national qualification (or VET) authorities, sector or occupational committees or working groups to develop qualifications and standards, as well as independent assessment bodies. However, many of the elements are just beginning to emerge with incomplete or fragmented governance structures. This is partly a result of insufficient financing or capacity attribution for operationalization of the legal framework and respective guidelines.

The countries identify and define NQF components differently, referring variously to full and partial qualifications or units, and their mechanisms for assessment and recognition also differ. In most Western Balkan countries the national VET agencies or qualifications authorities normally set the standards or criteria for developing and delivering qualifications, coordinating the development of individual qualifications with the help of expert groups.

In Montenegro, the VET Centre, the Education Bureau and universities are in charge of the various types of qualifications. Draft standards are developed by expert working groups and are usually reviewed by representatives from business. The VET Centre forwards the occupational standards to the National Council for adoption, before these are published by the Ministry of Labour and Social Welfare. In the former Yugoslav Republic of Macedonia, the National VET Centre has developed a number of occupational standards with the help of foreign experts, but they are not yet applied in practice. This situation points to a deeper problem that such standards have frequently been developed with inadequate consideration of how they will be used in practice.

Employers are formally involved but collaboration is in the early stages of development

Additionally, Croatia and Turkey have set up sector councils in all key economic sectors, and Serbia has established something similar for a few pilot areas. Montenegro has plans for a Council for Qualifications, as well as sector commissions involving economic actors as per the 2010 Law on the NQF. Chapter 3 explored the approach of these sector councils, changing the focus to a more comprehensive analysis of the skills or qualifications currently needed by employers in the given sector, rather than starting from a pre-defined list of occupations.

Staff from national VET agencies make efforts to encourage cooperation from employers, but these groups are not always responsive, meaning that collaboration with economic partners is still in the early stages of development to the extent that 'education actors tend to dominate the debates in the various fora' (Rinaldi et al., 2012, p. 26) in countries like Croatia. The situation is compounded by the fact that the effort required

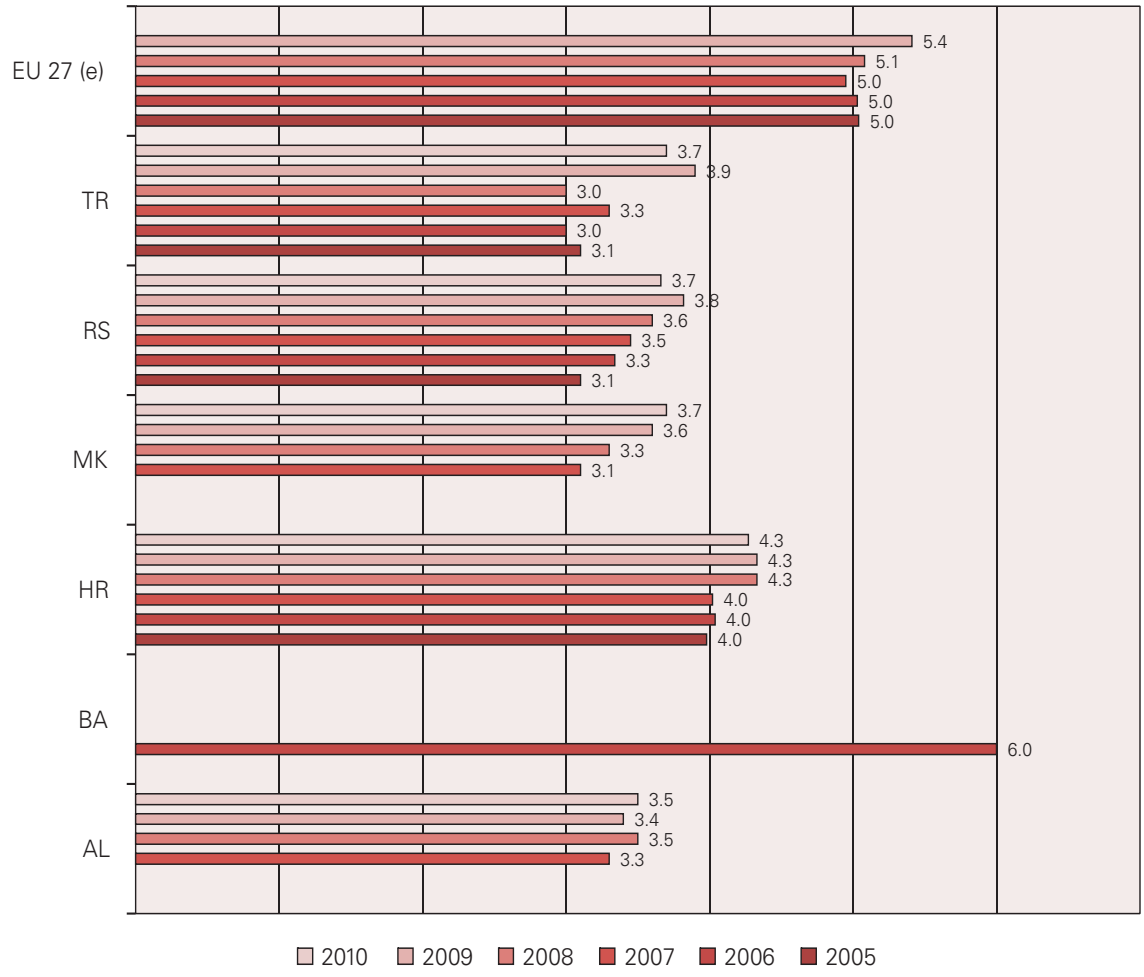
for establishing full definitions of all qualifications and tying them in to the competence levels of the framework is typically underestimated, with countries setting totally unrealistic deadlines – the Croatian goal of 2012 is a case in point.

Despite these difficulties, however, the design of an NQF indicatively referenced against the European Qualifications Framework offers the potential for improved transparency in the governance of vocational education. However, this process requires substantial time for consultation and technical preparation. Countries could draw on the short-term deliverable concept in the Bruges Communique to break the process down into manageable chunks – short-term deliverables – which would help the countries track progress. The fact that each country already has an NQF under development to some degree and that all of these frameworks are expected to be referenced against the European Qualifications Framework criteria in future, points to broad scope for a common target to channel their development and share data on progress.

Education expenditure is low compared to investment needs

Croatia leads the other countries in terms of public expenditure on education as a share of GDP, with 4.3% in 2009. Percentages of the remaining countries (for which we have recent data) fall below 4% which is lower than the EU average of 5.4% in 2009. This suggests that education is actually of relatively low importance despite the rhetoric to the contrary.

FIGURE 5.1 PUBLIC EXPENDITURE ON EDUCATION AS A SHARE OF GDP (%)



Sources: AL – INSTAT, 2010; BA – Council of Ministers, 2008, EU-27, HR, RS and TR – Eurostat; (e) Eurostat estimates.

Responsibilities for financing education are typically shared between national and local governments, although the bulk of the expenditure, on teachers' wages and major capital investments for example, is borne by the state.

Spending on education in the region should be viewed against a backdrop of years of relative neglect of the educational infrastructure and the consequent need for enormous investments to upgrade buildings and equipment as well as curricula, materials and teaching skills. In Turkey in particular, the low level of public investment must be assessed against large and increasing numbers of students, most of whom receive education in primary or secondary schools that operate a double shift system, coupled with the additional needs of large numbers of early school leavers.

Vocational school infrastructure remains poor and funding is not high on the policy agenda

In countries with relatively high GDP levels, such as Croatia, equipment has been upgraded to modern standards in about half of all schools. The situation remains particularly problematic in schools on islands and in Areas of Special State Concern (those areas worst affected by the war), as well as in schools offering programmes for rare occupations. The most neglected segment is reportedly VET, where 75% of the school infrastructure is outdated and poorly equipped (Rinaldi et al., 2012, p. 22).

One common problem across the countries is the fact that the shares of education expenditure dedicated to VET have, by and large, been declining over the years and are relatively low. Thus, the expenditure on VET (ISCED level 3) as total public expenditure on education in 2010 amounted to 23.3% in Serbia (down from 24.2% in 2007) and 24.7% in Montenegro[6]. The bulk of funding goes to basic education (compulsory elementary and lower secondary education), as well as higher education, where educational resources often favour 'high end' provision. This particular point drew criticism in Turkey where the merit-based system often benefits students from higher-income families in a way that raises efficiency and equity concerns (OECD, 2006). The former Yugoslav countries have also retained merit-based systems in access to higher education; a sector in which some payment of scholarship and allowances still takes place.

Resource allocation and use needs to be re-examined

Countries across the region are all seeking to improve public and private investment in VET and identify further steps to be taken. For both initial and continuing training, this implies a greater emphasis on efficient resource allocation and use, stimulating investment in VET from companies and individuals (on a cost-sharing basis) and complementing scarce national resources with EU or other donor funds in a targeted manner.

Areas for improvement also include: agreements on the minimum budget required; the definition of criteria to be used by local governments in granting funds to (vocational) schools; and the financial reporting system.

Specific problems exist in situations like that of the former Yugoslav countries, where national and local governments are theoretically supposed to allocate money to schools according to formulas based on objective criteria, such as number of classes, square metres and type of heating fuel, but where these formula are not applied in practice. Funds are in fact determined on the basis of 'historical' budgets, which often fall below the level of current real needs. A direct consequence of this is a large difference in spending per student across regions and communities. This phenomenon is common to many post-socialist countries which also lack the political will and organisational capacity to adjust the current system.

An IMF study on Croatia (Jafarov and Gunnarsson, 2008) suggests moving towards a per capita performance-based budgeting system, while gradually increasing local government control of and responsibility for delivering educational services. Per capita funding is a standard practice in most EU countries. It can be used to correct inefficiencies and inequalities within the system and encourages schools to improve performance to attract more students. One key issue for the Western Balkan countries in this

6 Sources: Serbia – National Statistical Office; Montenegro – Ministry of Education and Sport and VET Centre.

context is whether the money should be allocated to local governments or directly to schools. Essentially, a political decision must be taken as to whether distribution and equity concerns are to be dealt with at national or local levels.

Finding ways to stimulate private investment concurrently is key

Countries are also working on approaches to stimulate private investment in VET from both companies and individuals, with consideration of the following mechanisms explored by the EU countries:

- securing a certain level of investment in training from companies through a levy system;
- creating incentives for companies and individuals to invest in learning, e.g. through tax incentives, vouchers, individual learning accounts, saving schemes or low-cost loans;
- promoting apprenticeships, e.g. through subsidies or tax deductions for companies offering places for apprentices.

Existing apprenticeship and voucher schemes could be expanded

The Western Balkan countries and Turkey have gained some experience with training voucher schemes (e.g. for disadvantaged adults in Albania and for small- and micro-businesses in the former Yugoslav Republic of Macedonia), as well as with apprenticeship schemes (see Section 5.2).

The labour ministry in Croatia adopted the State Subsidy for Education and Training Act in 2007; a law on tax incentives for companies engaging in training. This device provides for a deduction from the tax base of up to 50% (70% in the case of SMEs) of the cost of general adult education and training and 25% (35% for SMEs) of the cost of specific employee training. However, uptake was low for three main reasons: (i) few companies knew about the system; (ii) implementation, including supervision and control mechanisms had not been clearly defined; and (iii) companies were reluctant to apply for the scheme because either they did not want to disclose all their income or they found the application process too cumbersome. Tax deductions for either individuals or companies are likely to be effective in countries that have efficient tax collection systems.

In 2013, the former Yugoslav Republic of Macedonia plans to introduce a National Corporate Fund to support the training of employed staff and adaptation to technological change, although the full details have not yet been disclosed (Ercan Su et al., 2013).

Providing incentives for schools to generate additional income

Partner countries might identify opportunities for saving from rationalisation in the existing education and training system and in parallel remove constraints which prevent schools or training centres from generating their own income. This might prompt these institutions to look for other training clients and deliver new types of services that could provide benefits for their 'regular' VET provision in the long run.

Individual countries would be well advised to design and combine various financing instruments with a view to achieving a higher participation in learning, in particular amongst adults. A special focus should be placed on cost-sharing policies with employers and on financing schemes that better target disadvantaged people, companies or regions, the selection of which must be based on clear indicators. National VET or adult education agencies should closely monitor the implementation of new financing schemes and evaluate their effects on the different target groups.

CONCLUSIONS

Significant progress has been made in the region since 2010. However the performance of the Western Balkan countries and Turkey in relation to the EU benchmarks for education (Table 4.1) also suggests that a lot of more systematic work still remains to be done.

Vision and state of the art in vocational education and training

The Western Balkans and Turkey Torino Process report highlights the need for the countries of the region to establish a shared and comprehensive vision for lifelong learning integrated with national economic, employment, regional and social policies. The various ministry, local and agency actors, and government partners, need to seek ways to work together and define a shared and anticipatory vision for the development of human capital. A comprehensive approach to education system development is therefore also needed in view of continued efforts by countries to reach EU education, training and employment objectives.

The division of responsibilities among different ministries or ministry departments and agencies, particularly in reference to the various VET levels and target groups, hinders the development of a more comprehensive vision of HRD and integrated economic, employment, regional and social policies. Once established, any such vision or overall country strategy would then need to be translated into the actual contributions to be made by each individual educational sub-sector and the necessary capacity for implementation ensured.

External efficiency: Addressing demographic, economic and labour market needs

The cumulative effects of the economic transformation and industrial restructuring, the downturn and insufficient crisis response have led to negative impacts on the labour markets from 2008, including high rates of inactivity or informal sector activity, unemployment and youth unemployment in particular. In addition, as Figure 2.2 on EU benchmarks for employment shows, the EU accession process requires the improvement of key employment indicators in many countries to measure the effective link between VET and the world of work. This suggests a renewed focus is required on the employability of young people and adults in a way that has clear implications for vocational training. In just such a situation, VET is ideally placed to function in an enhancing role alongside macro-economic policies and job-creation measures in on-going efforts to fight informal employment and review social benefit systems.

External efficiency: Addressing social demands for vocational education and training and promoting social inclusion

As the bulk of vulnerable groups (youth, women, inactive and long-term unemployed populations) have low skill levels, adequate larger-scale, better-targeted measures are needed to increase skills and boost access to gainful economic activity. The IPA HRD programmes or other donor projects could offer valid contributions to such an approach.

Internal quality and efficiency of initial and continuing vocational education and training delivery

The Torino Process confirms that significant progress has been made in internal quality of the system, in particular inspired by EU tools and instruments. However, the analysis suggests that Western Balkan countries and Turkey still have further steps to take to fully implement NQFs including embedding key competences into the VET curriculum. In addition, countries may consider expanding labour market-oriented VET at post-secondary and tertiary levels and ensuring the development of practical skills through work-based learning and apprenticeships. Finally, the key challenge of stepping up efforts to enhance the skills of vocational teachers and trainers remains.

Governance and financing of the initial and continuing vocational education and training system and institutional capacities for change

All the countries are working to reinforce their multilevel governance and financing systems. The analysis suggests that further capacity building and incentives are needed to encourage social partner involvement in VET. The role of social partners in vision and policy development should be more clearly defined. This could be achieved effectively through organising and resourcing the work of respective bipartite or tripartite councils or other fora. Many countries are already working on the development of sector councils which play a valuable role in assessing skill needs and defining qualifications, taking account of national economic development priorities and new qualifications or competences. New or stronger regional structures and empowerment of regional actors should seek to build regional partnerships for employment, partially with a view to preparation for the European Social Fund. In addition, given the importance of labour migration in the Western Balkan and Turkey (e.g. construction, tourism), regional cooperation structures and initiatives can help to ensure economies of scale.

As regards financing, the countries are re-examining policies for the allocation and use of funds to increase efficiency, stimulate private investment (e.g. expanding apprenticeship and voucher schemes) and encourage schools to generate and retain additional income. Finally countries are considering new or strengthened multifunctional centres in VET to pool resources and develop centres of excellence to serve a range of learners, employers and the community.

Significant support is available to the region from the EU Instrument for Pre-Accession Assistance and this could be used to help governments address the challenges they face on evidence-based policy and to subsequently implement appropriate solutions. However, as the Torino and Bruges exercise confirm, human capital development is a cross-cutting issue of relevance to many different aspects in the development of the national economy. There is a need to integrate the many fragments in a way that allows the relevant actors to plan their response, identify their needs and acquire the resources necessary to enable them to function over time.

The FRAME – Skills for the Future EU project entrusted to the ETF is the type of solution that will support countries of the EU Enlargement region[7] in the development of more coherent and evidence-based policy approaches for HRD (with particular reference to Europe 2020 and the South East Europe (SEE) 2020 Strategy) through the application of foresight methodologies.

The FRAME project consists of the four interrelated components of foresight, institutional capacity assessment, monitoring, and a regional approach in a way that will help the countries to: (i) define a vision for skills in the wider HRD context for the 2014-20 period; (ii) delineate capacity development priorities to implement that vision (namely, assessment of institutional capacity); (iii) develop the monitoring system to assess progress made in this field; and (iv) enhance regional cooperation for comprehensive long-term and forward-looking policy planning and implementation, taking country-specific issues into account.

This project will promote awareness of the relevance and utility of foresight approaches in developing more effective implementation of the HRD element of IPA II and national strategies, by uniting the relevant stakeholders and engaging them in a common drive. Overall, the FRAME methodology will continue much of the work of the Torino Process by encouraging evidence-based policy making and implementation in the region.

It is precisely this type of approach that will better align the education and training system with the needs of the economy and the labour market, strengthening institutional capacities and inter-institutional cooperation to ensure joined-up policy approaches across government.

7 Albania, Bosnia and Herzegovina, former Yugoslav Republic of Macedonia, Kosovo, Montenegro, Serbia and Turkey.

STATISTICAL ANNEX

TABLE 1 GDP AND FDI

	GDP PER CAPITA (CURRENT USD PER PERSON)					FDI NET INFLOWS (% OF GDP)			
	2008	2009	2010	2011	2012	2008	2009	2010	2011
Albania	4,087	3,809	3,705	4,020	3,821	9.6	11.1	9.2	10.6
Bosnia and Herzegovina	4,741	4,376	4,272	4,654	4,262	5.4	0.8	2	2.1
Croatia	15,694	14,050	13,449	14,182	13,061	8.7	5.5	1.4	2
Kosovo						9.5	7.5	8.7	8.5
former Yugoslav Republic of Macedonia	4,828	4,548	4,552	5,162	4,935	6.2	2.8	3.3	4.9
Montenegro	7,100	6,464	6,383	7,317	6,966	21.2	36.9	18.5	12.4
Serbia	6,485	5,497	4,892	5,725	4,917	6.3	4.8	3.5	5.9
Turkey	10,272	8,528	10,017	10,363	10,457	2.7	1.4	1.2	2.1

Sources: GDP – International Monetary Fund, World Economic Outlook Database, October 2012 (shaded cells indicate IMF staff estimates); FDI – World Bank, World Development Indicators database, online data. Last accessed 22 January 2013 at http://databank.worldbank.org/ddp/home.do?Step=3&id=4 and www.imf.org/external/pubs/ft/weo/2012/02/weodata/download.aspx

TABLE 2 INDUSTRIAL PRODUCTION INDEX (2005=100)

	2008	2009	2010
Albania	117.9	116.5	139.6
Bosnia and Herzegovina[e]	128.7	130.6	135.4
Croatia	110.6	100.4	99
Montenegro	99.1	67.5	79.4
former Yugoslav Republic of Macedonia	115.6	105.6	100.5
Serbia	110	96.1	98.5
Turkey	114.2	102.9	116.4

(e) – estimates.
Source: Eurostat, online database

TABLE 3 DOMESTIC CREDIT PROVIDED BY THE BANKING SECTOR (% OF GDP)

	2008	2009	2010	2011
Albania	66.1	68	67.1	69.1
Bosnia and Herzegovina	67.2	52.9	65	57.7
Croatia	74.5	76.4	82.2	88.5
Kosovo	10.5	14.1	17.7	20.8
former Yugoslav Republic of Macedonia	41.3	43.5	48.5	46.7
Montenegro	88	76.2	67.9	61
Serbia	40.3	48	57.6	55
Turkey	52.5	63	69.6	69.4

Source: World Bank, World Development Indicators database

TABLE 4 INWARD REMITTANCE FLOW (USD MILLION)

	2006	2007	2008	2009	2010	2011e	REMITTANCES AS A SHARE OF GDP 2010 (%)
Albania	1,359	1,468	1,495	1,318	1,156	1,221	10.9
Bosnia and Herzegovina	2,157	2,700	2,735	2,133	1,906	2,021	12.9
Croatia	859	1,194	1,292	1,271	1,287	1,236	2.1
Kosovo	774	922	1,046	973	932	932	17.5
former Yugoslav Republic of Macedonia	267	345	407	381	388	435	3.9
Montenegro		196	298	302	301	334	7.5
Serbia		3,064	2,710	3,936	3,351	3,719	10.4
Turkey	1,146	1,248	1,476	1,026	993	1,235	0.1

Notes: All numbers are in current (nominal) USD. (e) – estimates.
Source: World Bank staff calculation based on data from IMF Balance of Payments Statistics Yearbook 2011 and data releases from central banks, national statistical agencies and World Bank country desks, online data. Last accessed 22 January 2013 at: http://data.worldbank.org/data-catalog/migration-and-remittances

TABLE 5 ENTERPRISES ACCORDING TO SIZE

	TOTAL	OF WHICH (%)				
		Micro (0-9)	Small (10-49)	Middle (50-249)	Total SMEs	Big (250+)
Albania (2010)	100	95.7	3.5	0.7	99.9	0.1
Bosnia and Herzegovina (2012)	26,137	95.4		3.9	99.3	0.7
Croatia (2010)	163,416	91.9	6.7	1.2	99.7	0.3
Kosovo (2010)	103,755	98.4	1.4	0.2	99.9	0.1
former Yugoslav Republic of Macedonia (2011)	59,830	92.5	6.3	1.1	99.8	0.2
Montenegro (2012 Q1)	100	98.6		1.2	99.8	0.2
Serbia (2010)	83,787	86.2	10.7	2.5	99.4	0.6
Turkey (2009)	1,973,739	99.6		0.3	99.9	0.1

Notes: Q1 – 1st quarter; NACE sectors included are B, C, D, E, F, G, H, I, J, L, M and N with the following exceptions: AL – industry, construction, trade and services; HR – missing C and D; MK – including also P, Q and R; ME – missing M and N; XK – sectors unknown.
Sources: AL – Ministry of Economy, Trade and Energy, 2010; HR – Central Bureau of Statistics, Annual structural business indicators, online database (last accessed 4 September 2012); RS – Statistical Office of the Republic of Serbia, Structural business statistics, online database (last accessed 4 September 2012); MK – State Statistical Office, Business entities, online database (last accessed 4 September 2012); ME – Statistical Office of Montenegro, Department for Register, 'Analysis of number and structure of business entities in Montenegro for the first quarter of 2012'; TK – Turkish Statistical Institute, Business statistics, online database (last accessed 4 September 2012); BA – Agency for Statistics of Bosnia and Herzegovina, Statistical Business Register, Year II No 1 (data as of 30 June 2012); XK – Kosovo Business Registration Agency (as reported in Republic of Kosovo Government, 'SME development strategy for Kosovo 2012-2016', 2011, p. 17)

TABLE 6 ACTIVITY RATES (15-64) BY GENDER (%)

	ALBANIA		BOSNIA AND HERZEGOVINA		CROATIA		KOSOVO	
	2008	2010	2008	2011	2008	2010	2008	2011
Total	61.9	62.3	53.5	53.8	63.2	60.8	46.2	48.1
Male	72.1	72.3	67.7	66.3	70	67.4	66.2	67.5
Female	52.8	59.2	39.5	41.2	56.6	54.4	26.1	28.8
	FORMER YUGOSLAV REPUBLIC OF MACEDONIA		MONTENEGRO		SERBIA		TURKEY	
	2008	2011	2008	2011	2008	2011	2008	2011
Total	63.5	64.2	61.2	57.3	62.7	59.4	49.8	53.2
Male	76.6	76.8	69.5	63.8	71.2	68.1	73.8	75.6
Female	50.2	51.2	53	50.9	54.4	50.7	26.2	31

Sources: AL – INSTAT, LFS results; XK and TR – Eurostat, online database; BA, HR, MK, ME and RS – National statistical offices, LFS publications

TABLE 7 EMPLOYMENT ACCORDING TO ADMINISTRATIVE DATA (ANNUAL AVERAGE IN THOUSANDS)

		2006	2007	2008	2009	2010
Bosnia and Herzegovina	Total	654	670	731	701	682
	Men	395	435	447	422	405
	Women	260	235	284	280	277
Croatia	Total	1,468	1,517	1,555	1,499	1,432
	Men	806	833	854	820	775
	Women	661	684	701	679	657
former Yugoslav Republic of Macedonia	Total	418	434	435	426	–
	Men	242	250	244	248	–
	Women	176	184	190	179	–
Montenegro	Total	151	156	166	174	–
	Men	86	86	93	–	–
	Women	65	70	73	–	–
Serbia	Total	2,026	2,002	1,999	1,889	1,796
	Men	1,153	1,134	1,126	1,051	991
	Women	873	868	874	838	805

Source: Centre of Public Employment Services of Southeast European Countries, Statistical Bulletin No 3, July 2011

TABLE 8 EMPLOYMENT RATES (15-64) BY GENDER (%)

	ALBANIA		BOSNIA AND HERZEGOVINA		CROATIA		KOSOVO	
	2008	2010	2008	2011	2008	2011	2008	2009
Total	53.8	53.5	40.7	38.7	57.8	52.4	24.1	26.1
Male	63.0	63.1	52.9	48.7	65	57.9	37.7	39.7
Female	45.6	44.5	28.7	28.7	50.7	47	10.5	12.5
	FORMER YUGOSLAV REPUBLIC OF MACEDONIA		MONTENEGRO		SERBIA		TURKEY	
	2008	2011	2008	2011	2008	2011	2008	2011
Total	41.9	43.9	50.8	45.9	53.7	45.4	44.9	48.4
Male	50.7	52.3	58.3	51.2	62.3	52.4	66.6	69.2
Female	32.9	35.3	43.5	40.7	45.3	38.3	23.5	27.8

Sources: AL – INSTAT, LFS results; BA, HR, XK, ME, MK and RS – National statistical offices, LFS publications; TR – Eurostat, online database

TABLE 9 UNEMPLOYMENT RATES (15-64) BY GENDER (%)

	ALBANIA		BOSNIA AND HERZEGOVINA		CROATIA		KOSOVO	
	2008	2010	2008	2011	2008	2011	2008	2009
Total	13.0	14.2	24	28	8.6	13.9	47.5	45.4
Male	12.5	12.8	21.9	26.5	7.1	14.1	42.7	40.7
Female	13.5	15.9	27.4	30.5	10.4	13.6	59.6	56.4
	FORMER YUGOSLAV REPUBLIC OF MACEDONIA		MONTENEGRO		SERBIA		TURKEY	
	2008	2011	2008	2011	2008	2011	2008	2011
Total	34.0	31.6	16.9	19.9	14.4	23.6	9.9	9.0
Male	33.7	31.9	16.1	19.7	12.6	23.1	9.8	8.4
Female	34.3	31.0	18.0	20.1	16.7	24.3	10.2	10.3

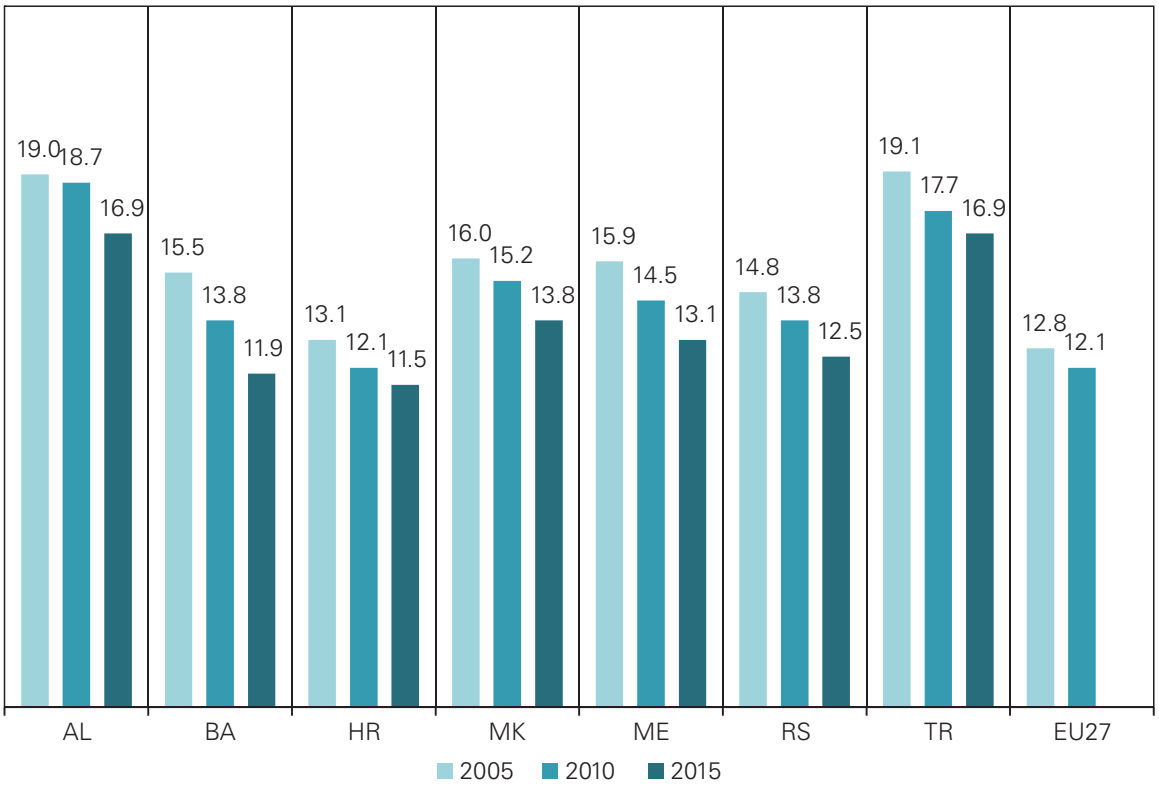
Sources: AL – INSTAT, LFS results (age group 15+); BA, HR, XK, ME, MK and RS – National statistical offices, LFS publications; TR – Eurostat, online database

TABLE 10 SHARE OF LONG-TERM UNEMPLOYED PEOPLE (%)

	TOTAL	MONTHS IN UNEMPLOYMENT 2008 (% OF TOTAL)		TOTAL	MONTHS IN UNEMPLOYMENT 2011 (% OF TOTAL)	
		0-12	12+		0-12	12+
Albania	**100**	34.6	65.4	**100**	37.7	62.3
Bosnia	**100**	13.6	86.4	**100**	19.2	80.8
Croatia	**100**	38.5	61.5	**100**	39.1	60.9
former Yugoslav Republic of Macedonia	**100**	15.1	84.9	**100**	17.4	82.6
Montenegro	**100**	20.6	79.4	**100**	20.4	79.6
Serbia	**100**	28.9	71.1	**100**	26.3	73.7
Turkey	**100**	76.2	23.8	**100**	76.3	23.7

Sources: National statistical offices, LFS publications; AL – INSTAT, online database; MK and TR – Eurostat, online database (based on LFS)

FIGURE 1 POPULATION AGED 15-24 (% OF TOTAL POPULATION)



Note: 2010 – provisional data.
Source: Population Division of the Department of Economic and Social Affairs of the United Nations Secretariat, World Population Prospects: The 2010 Revision (http://esa.un.org/unpd/wpp/index.htm (population projections)); EU-27 data – Eurostat, online database, population on 1 January, structure indicators (http://epp.eurostat.ec.europa.eu/portal/page/portal/statistics/search_database)

TABLE 11 UNEMPLOYMENT RATES (15-24) (%)

	ALBANIA		BOSNIA AND HERZEGOVINA		CROATIA		KOSOVO	
	2008	2010	2008	2011	2008	2011	2008	2009
Total	27.2	30.5	47.5	57.9	22	36.1	73	73
Male	27.1	29.6	44.8	56.4	18.5*	35.6*	68.6	68.5
Female	27.2	31.8	52.3	60.5	27.2*	36.8*	81.8	81.7
	FORMER YUGOSLAV REPUBLIC OF MACEDONIA		MONTENEGRO		SERBIA		TURKEY	
	2008	2011	2008	2011	2008	2011	2008	2011
Total	56.4	55.3	30.5	37.1	35.2	50.9	18.5	16.7
Male	55.7	55.5	32.1	35.6**	31	47.6	18.3	15.5
Female	57.4	54.8	28.2	39.3	41.3	57.1	18.9	19

Notes: (*) Q1, Labour market, News release; (**) less accurate estimates.
Sources: AL, BA, HR, XK, ME, MK and RS – National statistical offices, LFS publications; TR – Eurostat, online database (based on LFS)

TABLE 12 EMPLOYMENT RATES (15-64) BY GENDER, EDUCATION LEVEL AND PROGRAMME (%)

	ALBANIA 2009			MONTENEGRO 2011			SERBIA 2011		
	Total	M	F	Total	M	F	Total	M	F
No education	21.3	33.2	12.4				16.6	27.8	8.6
Primary (ISCED 1)	33.9	46.6	25	15.8*	31.9*	9.1*	40	55.2	32.6
Lower secondary (ISCED 2)	52.6	62.7	44.5	16.7	24.8	9.6	29.6	38.6	22.1
Upper secondary (ISCED 3)	53.6	66.5	39.4	49.2	53.8	44.3	47.3	54.1	39.3
■ Upper secondary (ISCED 3) – General	46.1	59.1	33.6	32.6	34.9	30.6	28.9	34	25.3
■ Upper secondary (ISCED 3) – VET	70.2	80.1	55.7	53.9	57.9	49.8	49	55.5	40.9
Post-secondary non-tertiary (ISCED 4)				59.6	69.9	49.7			
First stage of tertiary education (ISCED 5)	73.2	77.4	69.7	72.9	72.9	72.9	66.7	68	65.7
Second stage of tertiary education (ISCED 6)	78	92.6	68.2	92.8	96.8	88.9	99	100	98.2
All levels	53.4	64.4	43.6	45.9	51.2	40.7	45.4	52.4	38.3

Note: (*) Data for ISCED 1 include people with at least six years of school but not completed basic education, and people with basic education.
Sources: AL – INSTAT, LFS; ME – Monstat; RS – SORS, LFS

TABLE 13 UNEMPLOYMENT RATES (15-64) BY GENDER, EDUCATION LEVEL AND PROGRAMME (%)

	ALBANIA 2009			MONTENEGRO 2011			SERBIA 2011		
	Total	M	F	Total	M	F	Total	M	F
No education	25.7	14.7	41.2				41.1	34.3	52.3
Primary (ISCED 1)	15.2	13.2	17.7	39.1*	25.9*	51.6*	11.4	13.8	9.3
Lower secondary (ISCED 2)	11.5	10.8	12.4	29.9	25.8	37.6	24.6	23.7	25.8
Upper secondary (ISCED 3)	15.7	13.4	19.7	20.6	20.7	20.6	26.1	24.9	28.1
■ Upper secondary (ISCED 3) – General	18.4	15.8	22.4	19.3	17.5	21.1	24.9	23.9	25.7
■ Upper secondary (ISCED 3) – VET	11.4	9.8	14.6	18.1	18.4	17.7	26.2	24.9	28.2
Post-secondary not tertiary (ISCED 4)				9.5	15.3	0			
First stage of tertiary education (ISCED 5)	16.2	13.3	18.8	13.8	13.5	14	16.4	16.5	16.4
Second stage of tertiary education (ISCED 6)	9.7	7.4	11.7	0	0	0	1	0	1.8
All Levels	13.8	12.2	15.9	19.9	19.7	20.1	23.6	23.1	24.3

Note: (*) Data for ISCED 1 include people with at least six years of school but not completed basic education, and people with basic education.
Sources: AL – INSTAT, LFS; ME – Monstat; RS – SORS, LFS

TABLE 14 EMPLOYMENT RATES (15-64) BY GENDER AND EDUCATION LEVEL (%)

	BOSNIA AND HERZEGOVINA 2011			CROATIA 2011			KOSOVO 2009	FORMER YUGOSLAV REPUBLIC OF MACEDONIA 2011			TURKEY 2011		
	Total	M	F	Total	M	F	Total	Total	M	F	Total	M	F
ISCED 0-2	70.8[a]	70.9[a]	70.7[a]	30.6	35.6	27.1	9.3[c]	27.3	40.4	17.4	43.6	66.7	23.8
ISCED 3-4	70.1[b]	72.5[b]	65.7[b]	55.7	61.4	49.1	34.9[d]	49.4	54.3	43	51.9	69.5	27.3
ISCED 5-6	84.5	86.4	83.5	76.2	76.1	76.2	76.9[e]	68.6	71.5	65.8	72.7	81.3	60.9
All ISCED 1997 levels	72.4	73.8	70.1	52.4	57.9	47	26.4	43.9	52.3	35.3	48.4	69.2	27.8

Notes: (a) primary education and less; (b) secondary school; (c) without education, grade 1-4 of elementary education, grade 5-7 of elementary education and completed elementary education; (d) secondary education; (e) secondary non-tertiary, university, academy, Master and PhD.
Sources: HR, MK, TR – Eurostat, online database; BA – Agency for Statistics of Bosnia and Herzegovina, LFS 2011; XK – Statistical Office of Kosovo, LFS 2009

TABLE 15 UNEMPLOYMENT RATES (15-64) BY GENDER AND EDUCATION LEVEL (%)

	BOSNIA AND HERZEGOVINA 2011			CROATIA 2011			KOSOVO 2009	FORMER YUGOSLAV REPUBLIC OF MACEDONIA 2011			TURKEY 2011		
	Total	M	F	Total	M	F	Total	Total	M	F	Total	M	F
ISCED 0-2	29[a]	29[a]	29[a]	17.6	19.2	16.1	64.0[c]	38.2	40	34.8	8.3	8.9	6.8
ISCED 3-4	30[b]	27.6[b]	34.2[b]	14.6	14.4	14.8	46.3[d]	31.6	31.5	31.8	10.7	8.1	18.9
ISCED 5-6	15	13.8	17.1	8.8	8.8	8.8	14.69[e]	23	19.6	26.3	9.4	6.9	13.7
All ISCED 1997 levels	28	26	30	13.9	14.1	13.6	45.4	31.6	31.9	31	9	8.4	10.3

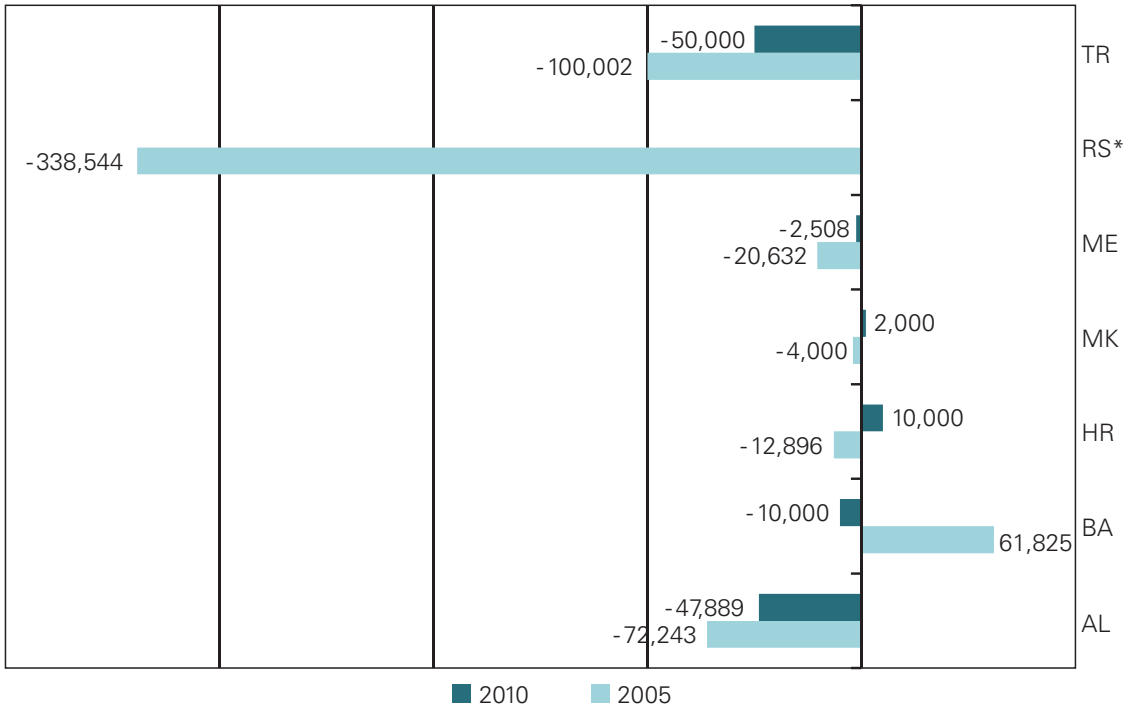
Notes: (a) primary education and less; (b) secondary school; (c) without education, grade 1-4 of elementary education, grade 5-7 of elementary education and completed elementary education; (d) secondary education; (e) secondary non-tertiary, university, academy, Master and PhD.
Sources: HR, MK, TR – Eurostat, online database; BA – Agency for Statistics of Bosnia and Herzegovina, LFS 2011; XK – Statistical Office of Kosovo, LFS 2009

TABLE 16 WESTERN BALKAN COUNTRIES AND TURKEY AND EU BENCHMARKS FOR EMPLOYMENT, 2011 (%)

	EU-27	EU 2020 OBJEC-TIVES	AL 2010	BA	XK* 2009	ME	RS	HR	MK	TR
Employment rate (20-64)	68.2	75	60.3	44.9 (25-64)		54.4 (25-64)	49.3	57	48.4	52.2
Employment rate (15-64)	64.3		53.5	38.7	26.1	45.9	45.4	52.4	43.9	48.4
Female employment rate (15-64)	58.5		44.5	28.7	12.5	40.7	38.3	47	35.3	27.8
Employment rate of older workers (55-64)	47.4		48.3	33.6 (50-64)	27.9	35.6	31.4	37.1	35.4	31.4
Employment in agriculture (% of total)[1]	4.6		42.1	19.6	6.2	10.9 (15+)	18.5	12.9	18.1	22.8
Unemployment rate (15+)	9.6		14	27.6	45.4 (15-64)	19.7	23	13.5	31.4	8.8
Female unemployment rate (15+)	9.6		15.9	39.9	56.4 (15-64)	20	23.7	13.2	30.8	10.1
Youth unemployment rate (15-24)	21.3		30.5	57.9	73	37.1	42.4	36.1	55.3	16.7
Unemployment rate of the older workforce (55-64)	6.8		8.2	18.6 (50-64)	25.9	12.1	18.9	8.5	28.2	4.3
Total long-term unemployment rate[2]	4.1		10.5	22.3	36.8	15.7	16.9	8.6	25.9	2.1

Notes: (1) Agriculture, forestry and fishing (15-64). (2) Long-term unemployed (12 months and more) as a percentage of the total active population (15+). XK – estimated on LFS data; AL – INSTAT data; RS – ETF estimate on LFS data.
Sources: EU-27, HR, MK and TR – Eurostat database; AL, BA, ME and RS – LFS publications; XK – ETF inputs to European Commission's progress report 2012 (unpublished)

FIGURE 2 NET MIGRATION



Note: (*) Including Kosovo.
Source: World Bank, World Development Indicators database

TABLE 17 ADULT LEARNING (25-64) PARTICIPATION RATE (%)

	2008	2011
Albania	2.4	2.1*
Croatia	2.2	2.3
former Yugoslav Republic of Macedonia	2.5	3.4
Montenegro	0.2	0.1
Serbia	5.9	4.3
Turkey	1.9	2.9

Note: (*) 2010.
Sources: AL – LFS 2008 and 2010; HR, MK and TR – Eurostat, online database; XK – Ministry of Labour and Social Welfare, Department of Labour and Employment, 'Labour Market and Employment', 2011; ME – Monstat, LFS; RS – SORS, LFS

ACRONYMS

CARDS	Community Assistance for Reconstruction, Development and Stabilisation
EQAVET	European Quality Assurance in Vocational Education and Training
ETF	European Training Foundation
EU	European Union
EU-27	European Union Member States
EUR	Euro (currency)
GDP	Gross domestic product
HRD	Human resources development
IMF	International Monetary Fund
IPA	Instrument for Pre-Accession Assistance
ISCED	International Standard Classification of Education
IT	Information technology
LFS	Labour Force Survey
NQA	National Qualifications Authority
NQF	National qualifications framework
OECD	Organisation for Economic Cooperation and Development
SME	Small and medium-sized enterprise
TRY	Turkish lira (currency)
USD	United States dollar (currency)
VET	Vocational education and training
VQA	Vocational Qualifications Authority

COUNTRY CODES

AL	Albania
BA	Bosnia and Herzegovina
HR	Croatia
ME	Montenegro

MK*	former Yugoslav Republic of Macedonia
RS	Serbia
TR	Turkey
XK*	Kosovo

(*) Two-letter code yet to be defined. The provisional code MK does not affect the definitive denomination of the country to be attributed after the conclusion of the negotiations currently taking place in the United Nations. XK is the provisional code used by Eurostat.

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