

Draft for stakeholder discussion

TORINO PROCESS 2022-2024: TOWARDS LIFELONG LEARNING

Guidelines to a new framework for
system monitoring and policy reviews

Disclaimer

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Setting the stage

The Torino Process (TRP) is a biennial review of vocational education and training (VET). It is carried out by countries in East and South-East Europe (including Turkey), Central Asia, and the South and East Mediterranean region on a regular basis under the coordination of the European Training Foundation (ETF), which is an agency of the European Commission (EC). The focus of the Process is on describing and analysing country developments, challenges in the domain of human capital development, and the ways in which countries mobilise their VET systems to address these challenges.

Since its inception in 2010, the Torino Process has established itself as a valuable repository of information in this respect, which is regularly used for monitoring and policy planning purposes by regional and national governments, international partners, and lately also by researchers in the field of education and training.

The Torino Process has some features (principles) which over time have facilitated its widespread adoption and by today have become intrinsically tied to the Torino Process “brand” and its added value. Examples of such features include a commitment to country participation and ownership, methodological solutions which rely on dialogue and consultations among stakeholders, the promotion and support for informed decision-making, and others. Features like these have proven invaluable in the exploration of policies, their impact, and improvement, all the while accounting for the large diversity of national and regional contexts in which these policies are being conceived and implemented.

One of the important attributes of the Torino Process is its adaptability to changing needs, circumstances, and priorities in line with regional, national, and global developments. Within the limits of principles like those described above, every round of the Process has had a specific focus and priority, and corresponding adaptations and improvements to its analytical framework and the ways in which evidence is being collected, interpreted, and presented.

The first round in 2010, for instance, established a baseline for subsequent reporting and piloted the comprehensive analytical framework of the Process in line with European Union (EU) priorities such as those agreed through the Copenhagen Process. The subsequent rounds in 2012 and 2014 refined the focus of reporting, deepened the capacity of countries to work with evidence, and facilitated a shift from the description of data and problems to analysis, with a view to designing options for action. The focus of the 2016 round was on evaluating progress in the implementation of countries’ plans to address the problems and meet the strategic objectives of their national VET systems, while in 2018-2020, the Process widened the perspective to include a broader array of issues in the field of human capital development and the contribution of VET to resolving these issues.

These Guidelines describe the new round of the Torino Process, which is launching in 2022 and will run until 2024 in close cooperation with the 27 partner countries of the ETF in line with their priorities and priorities of the EU. They present the new strategic orientation for the Process towards system performance and lifelong learning, introduce its new architecture and analytical framework that is aligned with this orientation, and describe the methodology of application of this framework.

A focus on lifelong learning

Learning today is taking place in a context of profound changes, which are already shaping the education of tomorrow and are demanding change. Some of these shifts take place in the education sector itself, others shape the context in which education systems work and deliver their outcomes.

Within education, long-standing distinctions between formal, informal, professional, and personal settings in the life of individuals and in the circumstances of their learning are becoming increasingly blurred. Learning experiences today can take place anywhere, anytime, and for any purpose of importance to a person and so, education systems must be able to provide the students of today and their peers of tomorrow with opportunities to learn and gain relevant skills at any point in their lives and for whatever reason, should they wish to.

This sector-specific shift towards lifelong learning is reinforced by external developments. Prominent examples include the digitalisation and rapid technological advancements in the world of work, international commitments to sustainable development, the consequences of the COVID19 pandemic and of conflict and war, such as the one in Ukraine, climate change and the associated push for the greening of economies, and others. Education systems are expected to remain resilient yet flexible in the face of such regional and global challenges, all the while delivering reliably on local level to the needs and expectations of learners, education practitioners, employers, and other beneficiaries.

For the many countries and cooperation partners which prioritise human capital development in their policies, these shifts mark the emergence of a new imperative for change. It is an imperative to accommodate the knowledge and skills needs of a growing number of learners who live in dynamic and often unpredictable environments rich in opportunities and risks, and who may not be bound to a single provider, fixed educational path, a predefined learning age or purpose anymore. It is also an imperative to work on transforming VET into a constituent part of a flexible yet resilient lifelong learning system through a new generation of responsibilities, reform targets, and solutions for the planning and implementation of policies.

In this new round, the Torino Process seeks to provide support to partner countries of the ETF which wish to engage in system change for lifelong learning. **System change** thereby refers to an *intentional process of modifying the structure, policy framework, incentives, and practices in education in ways that lead to fundamental and positive changes in the professional context, attitudes, values, and conduct of education participants and stakeholders*. **Lifelong learning** thereby refers to *all learning activity undertaken throughout life, with the aim of improving knowledge, skills/competences and/or qualifications for personal, social and/or professional reasons*.

The purpose of the Torino Process in this round is to provide evidence, incite reflection, and facilitate policy action towards the establishment of lifelong learning systems which rely on VET for addressing the needs of learners, irrespective of gender, background, or age. The assumption is that such systems are an important prerequisite for the greener, more diversified, innovative, and inclusive economies and societies which countries strive to build.

Torino Process framework

Reasons for change

The Torino Process framework is a tool for the collection, interpretation, and contextualisation of data and information regarding policy developments and progress in partner countries of the ETF. Ahead of each new round of the Process, the framework undergoes adaptations which ensure its relevance and feasibility of application in line with the specific thematic and strategic focus of each Torino Process round. In addition, adaptations and changes may be triggered by the results of regular internal and external consultations, evaluations, and reflections.

The changes to the Torino Process framework in 2022 as presented here, have been guided by three specific considerations.

The first are the recommendations of the 2021 ETF-UNESCO international conference on *Building lifelong learning systems: skills for green and inclusive societies in the digital era*. In their discussions and conclusions, over 750 participants in the conference – decision-makers, practitioners, and stakeholders from ETF partner countries and organisations, as well as the European Commission – confirmed that the creation of high quality, inclusive opportunities for lifelong learning is a shared priority for all.

The second consideration is the new ETF Strategy 2027, which establishes monitoring and assessment of education and training system performance as one of the three core services of the Agency, along policy advice and knowledge development.

Finally, the adaptations to the framework also consider the feedback received and lessons learned throughout the last round of the Torino Process, which confirm its added value as a participatory exercise, but also the need for simplification, flexibility, and a sharper focus on tracking and understanding policy and system performance.

The next sections present a new, two-level architecture for the Torino Process framework and the rationale behind it, and then provide details about each of the two levels.

New architecture

The analysis of cross-country findings from the latest round of the Torino Process confirmed that the policy context in ETF partner countries, for which there is evidence¹, is marked by two important features: i) a mounting pressure for change and adaptation in response to internal and external developments, and ii) a multitude of concurrent policies which aim at responding to this pressure by improving education and training systems and/or ensuring their smooth operation. According a cross-country analysis of Torino Process evidence in 2018-2021, in that period alone countries reported of designing or implementing hundreds of actions in as many as 15 strategic areas, such as financing of VET, qualification frameworks, inclusive education, quality assurance, curricular reform, etc.

Against the backdrop of this finding, the comprehensive, yet indiscriminate documentation of all policies in all countries through extensive questionnaires, which was the hallmark of previous Torino Process rounds, did not appear to be the most efficient approach. It was a resource- and effort-intensive solution, which also took a considerable amount of time to complete and was not well-suited to circumstances where information may be needed faster and/or on unforeseen but urgent topics and priorities (i.e. the COVID pandemic, distance learning, etc.)

To address this concern without compromising the relevance and reliability of the Torino Process, the framework in this round features a more agile and lean architecture. It is meant to facilitate a swift collection of relevant evidence and allow for annual thematic adjustments, while providing an option

¹ The 2018-2021 Torino Process cross-country analysis covered 26 out of 27 ETF partner countries.

for a more comprehensive, in-depth, country-led analysis as needed. The purpose is to ensure a faster, targeted, and demand-driven process of collecting, identifying, and interpreting information for policy purposes.

Along these lines, the new Torino Process framework is built around two guiding questions, which were chosen to be of relevance and significance to all participating countries:

1. What do education and training systems (and VET) deliver to their stakeholders in a lifelong learning perspective? In other words, how do these systems perform?
2. How can we explain the system performance in a lifelong learning perspective? In other words, how effective are the policies which target the education and training systems, and what can we learn from that for policy improvement?

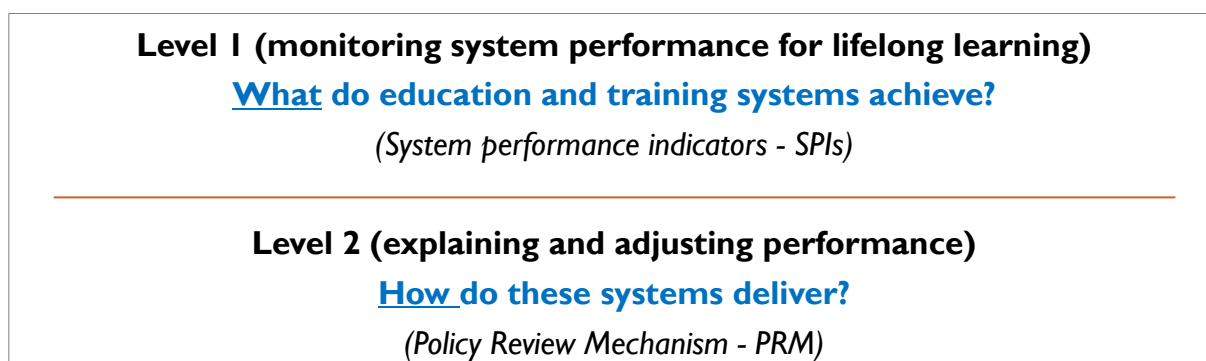
The new Torino Process framework meets two tasks along these lines. It tracks system performance by capturing a selection of policy and system outcomes which are indicative of what the education and training systems of partner countries deliver in a lifelong learning perspective. This is in response to the first guiding question. **Lifelong learning perspective** thereby refers to the learning of adults and youth in initial and continuing VET and in other formal, non-formal, and informal settings to which VET could or should contribute.

A second, follow-up task of the new framework is to guide the identification, review and assessment of policies and mechanisms which pertain to lifelong learning and help contextualise and explain the monitoring result. This is in response to the second guiding question.

The Torino Process framework is aligned with these two tasks and features a two-level architecture. The first level of the framework (Level 1) comprises a selection of quantitative and qualitative indicators as proxies for system performance (system performance indicators) in a carefully curated selection of monitoring dimensions associated with the commitments of countries to the provision of opportunities for lifelong learning, as described in the next section. The focus on this level is on monitoring policy and system performance in these dimensions on a country-by-country basis. This level can also be applied to the regions in a country, as needed.

The second level of the framework (Level 2) comprises areas which matter for the interpretation of monitoring results and for improving policy and system outcomes in a lifelong learning perspective. These areas are defined broadly so that they can accommodate various national priorities and expectations, but their choice is limited to those which are commonly seen as the elements of a lifelong learning system according to the policy and practice in EU and ETF partner countries. The second level of the Torino Process framework is about reviewing policies which target these areas (policies for lifelong learning). Figure 1 illustrates this architecture and the guiding questions on each level.

Figure 1. New Torino Process framework architecture



The two-tier architecture translates into two implementation tracks for the Torino Process in this new round. The first track (Level 1) collects and communicates information about policy system performance with the help of a limited number of system performance indicators (SPIs), which

document the annual progress of each country towards lifelong learning, with a specific focus on the contribution of initial and continuing VET (IVET and CVET) to that priority. This first track is annual and covers all partner countries.

The second track (Level 2) foresees the implementation of reviews of policies for lifelong learning, participation in which is foreseen for countries which wish to have a more-in depth understanding of the reasons behind their monitoring results, and of the ways in which they can improve their policies for lifelong learning. The second track is multiannual and participation in it is voluntary, on demand and/or on a region-by-region basis.

The next sections provide more detail about each of the two Torino Process framework levels: their purpose, focus, methodology and modality of implementation, and deliverables.

Level 1: Monitoring system performance for lifelong learning

Purpose

Education and training are a sector guided by commitments – to access, quality, inclusion, equity, non-discrimination to name a few – which steer the work of education practitioners, reflect the expectations of learners and other stakeholders, and describe the aspirations of policymakers. Some of them are also commitments of relevance to lifelong learning.

Such commitments are often described in the form of strategic goals or targets, such as the sustainable development goals (SDGs) for example, and they are subsequently used as reference points when judging about the policy progress of countries and deciding on corrections of course.

This is also the purpose of monitoring in this round of the Torino Process: to describe the performance of VET policies and systems in a lifelong learning perspective against a targeted selection of strategic goals and commitments, with the purpose of establishing a baseline for each country for subsequent monitoring rounds and of identifying areas in need of attention and possibly a more in-depth policy review. It is important to note that, although the focus is on goals and commitments which are common to all countries, the monitoring results are not intended for cross-country comparisons.

Performance in this sense describes the extent to which education and training systems meet goals and targets of relevance for human capital development and lifelong learning, whereas monitoring of performance refers to the tracking and documenting of progress over time in this respect.

Focus of monitoring

The development of the Torino Process framework included the careful identification of goals and commitments by means of which to monitor and report on system performance. To ensure that the selection of these goals and commitments is meaningful and relevant for lifelong learning across countries despite their different contexts, reform trajectories, and specific policy priorities, the identification relied on several considerations and steps.

Following the recommendations of the Building lifelong learning systems conference, which suggested that learners should be at the centre of every policy discourse, at the first step the identification process determined three broad areas of system performance which coincide with the typical trajectory of learners through any learning opportunity: access to learning, quality of learning outcomes and, as an intermediary area, the organisation of the system which provides the learning opportunity. These are also the areas in which stakeholders, and decision-makers typically expect to see the bulk of policy and system results (outcomes) in education and training.

The final formulation of these areas of system performance is as follows:

Table 1. Three areas of system performance in focus of Level 1 monitoring

- Area A. Access, participation, and opportunities for lifelong learning
- Area B. Quality of lifelong learning outcomes
- Area C. System organisation

At the second step, the identification process involved the scanning of country commitments which are reflected in ongoing multilateral initiatives, such as the UN Sustainable Development Goals, the UNESCO Belem Framework for Action, the EU Council Recommendation on VET and the Osnabruck Declaration, the EU Youth Guarantee, but also long-standing framework agreements such as the Salamanca Statement and Framework for Action, the International Covenant on Economic, Social and Cultural Rights, the Convention on the Elimination of All Forms of Discrimination against Women, the Convention on the Rights of the Child, the UNESCO/ILO Recommendation Concerning the Status of Teachers (1966), the UN Convention against Discrimination in Education, and others.

The scan led to the disaggregation of the three areas into a total of 8 monitoring dimensions, as follows:

Table 2. Disaggregation of system performance areas into 8 monitoring dimensions

Areas	Monitoring dimensions
A. Access, participation, and opportunities for LLL	A.1. Access
	A.2 Participation
B. Quality of learning outcomes	B.1 Quality and relevance
	B.2 Excellence
	B.3 Innovation
	B.4 Responsiveness
C. System organisation	C.1 Management and administration
	C.2 Resourcing

Finally, in a third step we specified the learners who are projected to benefit from the gradual fulfilment of the goals and commitments in focus of monitoring, as well as the learning settings in which these benefits are being delivered. In this round, the Torino Process monitoring distinguishes learners by age (youth and adults), gender, and by policy-induced features, such as disadvantage (youth and adults excluded or at risk of exclusion from education and/or employment) and status vis-à-vis country of usual residence (migrants). The learning settings on the other hand include formal education and training, non-formal education and training, and informal learning. Formal education and training cover general and vocational pathways, at any ISCED (International Standard Classification of Education) level to which this distinction is applicable in each country.

Based on these distinctions between learners and learning settings, the 8 monitoring dimensions are further broken down into a total of 30 specific policy and system outcomes, which are the actual focus of monitoring on Level 1 of the Torino Process framework. Below is an overview of these outcomes and a more detailed description of each can be found in Annex 1 to this document.

Table 3. Disaggregation of monitoring dimensions into 30 policy and system outcomes

Area A. ACCESS, PARTICIPATION, AND OPPORTUNITIES FOR LIFELONG LEARNING

Dimension A.1	ACCESS
Outcome A.1.1	Access and attractiveness: initial VET
Outcome A.1.2	Access and attractiveness: continuing VET
Outcome A.1.3	Access to opportunities for lifelong learning through labour market policies (ALMP); access to other opportunities for lifelong learning not included in outcomes A.1.1 and A.1.2
Dimension A.2	PARTICIPATION
Outcome A.2.1	Flexible pathways: vertical permeability
Outcome A.2.2	Flexible pathways: horizontal permeability
Outcome A.2.3	Completion of learning (graduation) in preparation of progression: to successive stages of education and training or to employment

Area B. QUALITY OF LIFELONG LEARNING OUTCOMES

Dimension B.1	QUALITY AND RELEVANCE
Outcome B.1.1	Key competences for lifelong learning and quality of learning outcomes
Outcome B.1.2	Adult skills and competences
Outcome B.1.3	Participation in work-based learning
Outcome B.1.4	Employability of learners
Outcome B.1.5	Participation in career guidance and education
Dimension B.2	EXCELLENCE
Outcome B.2.1	Excellence in pedagogy and professional development
Outcome B.2.2	Excellence in programme content and implementation
Outcome B.2.3	Excellence in governance and provider management
Outcome B.2.4	Excellence in social inclusion and equity
Dimension B.3	INNOVATION
Outcome B.3.1	Systemic innovation in providing access to opportunities for lifelong learning
Outcome B.3.2	Systemic innovation in promoting participation and graduation
Outcome B.3.3	Systemic innovation in boosting quality of learning and training outcomes
Outcome B.3.4	Systemic innovation in raising the relevance of learning and training outcomes

Dimension B.4	RESPONSIVENESS
Outcome B.4.1	Relevance of learning content: green transition
Outcome B.4.2	Relevance of learning content: digital transition
Outcome B.4.3	Responsiveness of programme offering

C. SYSTEM ORGANISATION

Dimension C.1	STEERING AND MANAGEMENT
Outcome C.1.1	Data availability
Outcome C.1.2	Participatory governance
Outcome C.1.3	Reliable quality assurance and public accountability
Outcome C.1.4	Professional capacity of staff
Outcome C.1.5	Internationalisation
Dimension C.2	RESOURCING
Outcome C.2.1	Adequate financial resource allocations and use
Outcome C.2.2	Adequate human resource allocations and use
Outcome C.2.3	Adequate material base

In sum, these outcomes incorporate a lifelong learning perspective through a purposeful disaggregation of learners, learning settings and pathways by age (youth, adults), gender, learning setting, strategic feature of the target population (e.g., disadvantaged youths and adults and migrants), pathway (general, VET), and level of education and training.

Process and deliverables

Preparation: choice of monitoring data

The outcomes in the monitoring part of the new Torino Process framework are “supplied” with quantitative indicators, chosen for their explanatory power regarding progress and performance with each monitoring outcome. The indicators are the same for all countries, but their selection can be revised from year to year as needed.

Each outcome is also provided with at least one qualitative evidence alternative in the form of a question for a narrative response by countries. Although the framework prioritises quantitative evidence, the qualitative alternatives are needed to account for the possibility that there may be no quantitative evidence available for some of the outcomes. The qualitative questions are the same for all countries, but their selection can be revised from year to year as needed.

For its supply of **quantitative indicators**, the framework relies exclusively on international databases and repositories which are free and open source, with readily available (that is, already collected) data, and which are regularly updated at the point of origin. Typical examples include the World

Development Indicators Database (WDI) of the World Bank, the database of the UNESCO Institute for Statistics (UIS), OECD PISA and PIAAC databases, the ILOSTAT of the International Labour Organisation, etc. The table below provides an overview of the provenience of quantitative indicators in the Torino Process monitoring framework at the time of preparation of these Guidelines.²

Table 4. Provenience of Level 1 quantitative indicators

Data repository	No. of indicators	Data repository	No. of indicators
ETF KIESE	2	PISA	62
European Social Survey	1	TALIS	32
Eurostat	27	The World Bank	7
Eurostat (AES)	2	TIMSS	10
ILOSTAT	1	UNESCO	1
Labour Force Survey	2	UNESCO (ITU)	2
OECD	1	UNESCO (UIL GRALE)	32
PIAAC	15	UNESCO (UIS)	8
PIRLS	5	UOE databases	4

The advantage of this approach to data is that the monitoring does not require the extra collection of quantitative evidence beyond what is already available. This should facilitate a smooth and fast annual compilation of data, without relying on the generation of primary evidence (i.e. through surveys) as this can be costly, time-consuming, and unsustainable in the long run. At the same time, there is a degree of trade-off too as for the most part, the quantitative indicators are not a direct match, but rather high-quality proxies for the policy and system outcomes in focus of monitoring. For instance, monitoring the attractiveness of CVET (outcome A.1.2) may rely on a proxy such as the average cost of a CVET course, as cost is among the known reasons for the non-participation of learners in CVET.

For its supply of qualitative alternatives to missing data, the Torino Process framework relies on questions (one or more per policy and system outcome) which are formulated in a uniform way and aim at eliciting information that can fill the gaps in the availability of quantitative evidence where such gaps exist. The formulation of these qualitative monitoring questions and the process of answering them (see below) invite responses which are easy to deliver, while complying with several key requirements:

- They are quantifiable
- They are as free from bias as possible
- They provide statements corroborated with sources
- They are officially vetted by the country

² Some of these internationally comparable indicators may be **based on quantifications** of responses to qualitative surveys, depending on the evidence collection methodology applied by the respective data provider.

To that end, each response features three components which must be provided before a response can be considered valid: a narrative component; a scale component; and a source component. Below is an example:

Table 5. Sample of a qualitative monitoring question

Question B.3.3

Outcome	Narrative component	Scale component	Source component
B.3.3 Systemic innovation in boosting quality of learning and training outcomes	Based on the policies and practices in your country, how would you describe innovation in boosting the quality of learning and training?	Has your government introduced any significant innovation along these lines regarding the quality of ALE in the last 5 years that could be of interest to other countries? Please choose only one of the following: <i>"No significant innovations"; "Few significant innovations"; "Moderate number of significant innovations"; "Large number of significant innovations"; "Very large number of significant innovations"</i>	Please provide one or more sources on the basis of which you made your estimate. The sources can be quantitative or in the form of references to documents. If available, please provide source hyperlinks (URLs).
RESPONSE			

Although the questions for each outcome are predefined and the repository of questions is the same for all countries, the questionnaires will vary in length and composition between countries depending on the availability of quantitative data in each. For this reason, these Guidelines do not include a full list of questions but are limited to a description of the format of this source of evidence.

Collection and compilation process

This section describes the process of collecting and compiling the monitoring evidence within the first level (Level 1) of the new Torino Process framework. The section covers the compilation of quantitative data, the collection of qualitative evidence, the preparation of the monitoring results, as well as the division of responsibilities between partner countries and the ETF at each of these three steps.

Compilation of quantitative data: the quantitative data is compiled annually according to the predefined list of Level 1 proxy indicators. As all indicators stem from public international repositories, their compilation for each country participating in the Torino Process will be desk-based and done by the ETF.

Collection of qualitative evidence: once the quantitative data is compiled for each country, the process advances to the collection of qualitative evidence, which takes place in three steps.

In the **first step**, the ETF composes executive qualitative questionnaires for each partner country, which draw on a compact, predefined list of questions that cover all policy and system outcomes in the monitoring framework.

As the questions are substitutes for missing quantitative data, their choice and number for each country will depend on the availability of data. If the predefined indicators for a given outcome are missing, the quantitative data for that outcome will be fully replaced by a qualitative alternative in the form of a question which will be included in the country questionnaire. "Missing" in this context may refer to a full absence of indicators (for instance in the case of outcomes for which indicators do not yet exist), or to a gap **of a third or more** of the predefined proxy indicators for outcomes for which indicators do exist.

The **second step** in the collection of qualitative evidence relies on the contribution by participating countries. Once the questionnaires have been compiled, they are sent to the respective national Torino Process coordinator, who is responsible for coordinating the preparation of responses within a timeframe of five weeks from the time of receipt.

Unlike in previous rounds of the Torino Process, there are no specific requirements regarding the process of preparing the responses, but there are two technical requirements regarding the responses themselves. These must include all three response components (narrative, scale, and source) which are illustrated in Table 5, and they must be vetted as the official responses of the country. The latter may imply that some of them will require coordination with other national and regional institutions and stakeholders, depending on the national context.

Finally, the **third step** involves the verification by the ETF whether the country responses comply with the technical requirements, i.e., whether each question has been provided with a response, and whether these responses feature all three components.

Once these steps have been completed, the monitoring evidence is ready for further use, as described in the next section.

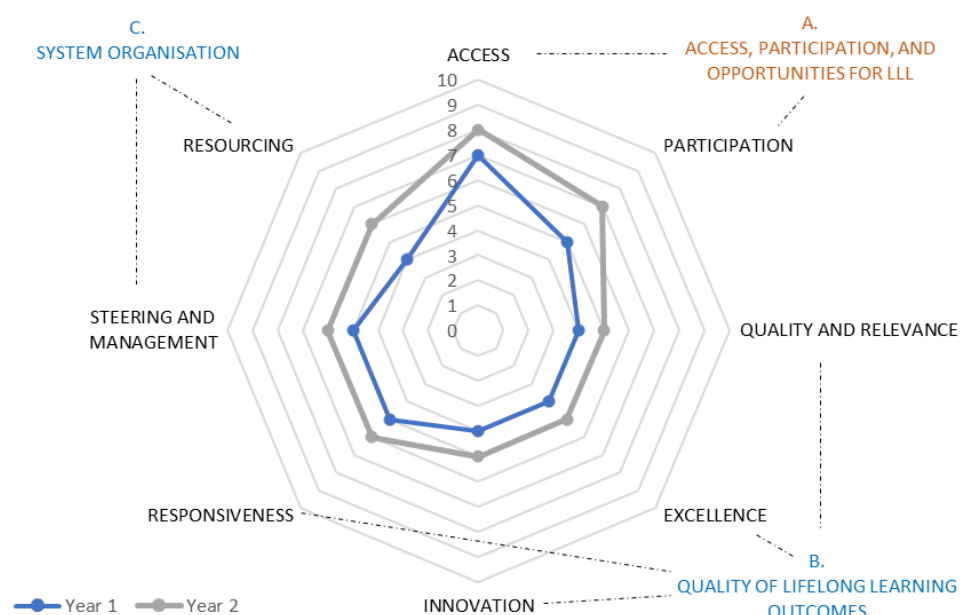
Preparation and use of monitoring results

At this stage in the monitoring process, the monitoring results are already fully available, albeit in a disaggregated form by outcome, indicator, and qualitative response. Nevertheless, they can already be used for analytical and reporting purposes. The country responses and quantitative indicators have an informational value as **stand-alone units of evidence**, which can be combined in numerous ways and used as a reference according to the reporting and planning needs of countries, EC services, and other partners.

In addition, as part of the regular process of monitoring, the ETF will use the monitoring results – quantitative and qualitative – for the annual construction of **composite indices**. These indices will have several levels of aggregation depending on their thematic focus.

The top and most visible layer will offer a composite index for the 8 monitoring dimensions of the Torino Process in each country, as shown in the tentative visualisation of hypothetical monitoring results which is based on dummy index values (Figure 2).

Figure 2. Sample of composite monitoring results by monitoring dimension



This is followed by several thematically targeted and lower levels of aggregation, which will include composite indices for policy and system performance regarding:

- Each policy and system outcome in the monitoring framework
- Each type of learning setting covered by the framework (formal, non-formal)
- Each group of learners in focus of monitoring (adults, youth, females, disadvantaged learners, migrants)

Once the aggregation process is complete and the final, aggregated monitoring results are available, they will be sent to each participating country for a final confirmation, with a possibility to provide brief, structured comments for the sake of contextualising the results.

The monitoring results and the comments will be released online in an interactive format.

Summary of responsibilities for countries and national coordinators

For the convenience of readers, this section summarises the preceding sections regarding the involvement, contribution, and responsibilities of countries and national Torino Process coordinators in the monitoring of policy and system performance on Level 1 of the Torino Process framework.

Through their nominated national coordinators, participating countries are in charge of the following:

- **At the stage of preparation for monitoring:** indicate if a country requests to supplement the national monitoring with monitoring on regional level
- **At the stage of evidence collection:** coordinate the preparation of responses to the Torino Process qualitative questionnaire and of revisions to the questionnaire if needed, following the validation of responses by the ETF
- **At the stage of preparing and using the monitoring results:** confirmation and provision of comments for the sake of contextualisation.

Level 2: Explaining performance through reviews of policies for lifelong learning

Purpose

The results from the policy and system monitoring on Level 1 will be contextualised and interpreted with the help of in-depth reviews of what countries do to influence and improve the performance of their policies and systems in a lifelong learning perspective (Level 2 of the Torino Process framework). The reviews will capture and interpret the effectiveness of policies and systemic arrangements in countries against the backdrop of demand for learning opportunities, as well as relevant socio-economic and demographic developments which may influence that demand.

The reviews seek to deliver insights and recommendations which are tailored to the context of each country and allow for progress towards the creation of meaningful and equitable lifelong learning systems for all prospective learners, while allowing for purposeful regional and cross-country comparisons with a focus on lifelong learning. The reviews further provide the evidential basis and opportunity for the policy dialogue during and at the end of each annual review cycle.

Focus of the policy reviews

Naturally, the needs and expectations of countries which are interested in reviewing their policies for lifelong learning will vary depending on their national context, policy priorities, and aspirations. The reviews are designed to accommodate the diversity of expectations and needs, but at the same time they will also retain a mandatory focus on areas which may be of significance for the contextualisation and explanation of monitoring results.

In this sense, the focus of the policy reviews is twofold:

- The reviews seek to **analyse the monitoring outcomes** of countries and provide guidance for timely policy action through VET in support of system change for lifelong learning if these outcomes are not as expected/desired. This aspect of reviewing is mandatory
- The reviews can also cover **supplementary areas of strategic significance for countries**, which they wish to prioritise for their own policy purposes pertaining to the contribution of VET (IVET and CVET) to lifelong learning

Based on an extensive literature review of EU and non-EU documents and assessing country examples, the choices which ETF and the partner countries can make regarding the review focus must be aligned with a broad list of five policy clusters and areas within these clusters, which national and international experience suggest are key aspects or elements of a lifelong learning system, irrespective of its set up. These areas are presented in Table 6 and may change as the review initiative progresses and delivers new insights into lifelong learning policy and practice.

Table 6. Elements of lifelong learning systems in focus of the ETF policy reviews

Policy cluster	Specific policy areas	Justification and significance for a system of LLL	Examples of tools/policy solutions
1. Governance and financing	Multi-level and multi-stakeholder governance	Private sector is fully part of the decision making in the skills policy cycle	Partnerships with private sector and PPPs Support for local partnerships / skills ecosystems
	Financial support	Encouraging the sustainable and sufficient funding of skills development systems	Incentives to increase adequacy of support for skills provision
2. Recognition of (the value of) skills	Qualifications	Contributing to the transparency and permeability between systems, pathways, and prior learning	Qualification systems that integrate formal / non-formal qualifications
	Validation of skills		Validation and recognition of prior learning

	Key competences and soft skills		Balance between occupation-specific/transversal skills
3. Career orientation and responsiveness of skills provision	Career guidance	Increasing the responsiveness of content of skills provision to skill needs of individuals, society, and labour markets	Integrated career guidance throughout learners' lives
	Evidence on skills demand		Feedback loop between anticipation of skill needs and continuous updating of learning outcomes
4. Access to and flexibility of skills provision	Modularisation / micro credentials	Expanding the flexibility of existing skills provision, tailored to individual needs	Availability of modularised skills provision
	Work-based learning		Expansion of work-based learning opportunities
	Digitalization		Integration of digital learning in skills provision
5. Quality of skills provision	Teaching and learning	Ensuring the quality of skills provision and confidence therein	Development of skills and competences of teachers
	Quality assurance		Integrated systems-level approach to quality assurance

Process, responsibilities, and deliverables

The Torino Process policy reviews are designed to be demand-driven, voluntary, and participatory: they take place in close cooperation with countries in the form of site visits, consultations, and other formats of dialogue and co-creation of policy insights and action.

The review methodology foresees a process which is divided in three phases: preparatory phase, analytical phase (which includes site visits), and validation/follow-up phase. The review implementation will take place on a region-by-region basis (one region per year, starting with SEMED in 2022). However, the ETF is stand-by to include a limited number of ad-hoc requests for reviews by countries from regions which are not in focus of a given year.

The sections below describe each review phase in some detail. A full description of the review methodology is available in a separate document, which will be provided on demand.

Phase one: preparation

The main aim of this first phase is to formalise the engagement of a country in the policy review and to specify the focus and scope of these reviews. The preparatory phase foresees the following five steps:

- **Formal expression of interest** by the country in the form of exchange of letters with ETF
- **Identification of issues and themes** which will be in focus of the review, within the scope of the broad policy clusters shared in Table 6 and in consideration of the monitoring outcomes on Level 1;
- **Nomination of a Torino Process national institutional counterpart** for the review, as well as a **national coordinator** for the review process (this can also be the national Torino Process coordinator). Depending on country expectations and inter-institutional traditions, this step may also include the formation of a national coordination body or committee (reference group) which will oversee the lifelong learning review, and which will act as consultative platform in order to assist in the implementation of the review process.
- **Submission by the country of documents and other (re)sources** (including data) of relevance to the chosen themes, which the country recommends that the review team familiarise itself with.
- **Formation of a review team**, which can consist of not more than five members: three national and international experts depending on the chosen themes (of which one lead reviewer/rapporteur), and two ETF representatives, of which one could be the ETF liaison for the country under review. The Review team works closely with the nominated national coordinator and members of the reference group (if there is any) during the review.

The fulfilment of these steps forms the basis on which the participating country and ETF can prepare and plan in detail the subsequent phases of the policy review.

Phase two: analysis and site visits

The analysis and site visits are the key stage in which the review collects relevant information through desk research and through consultations with a broad array of national, regional, and local counterparts who have stakes in the chosen review themes and questions. The analytical phase consists of **desk research** and **site visits**.

The aim of the **desk research** is to review the documentation and data provided in the preparatory phase in view of delivering the following results in preparation of the site visits:

- Short **issues paper**, in which the review team describes a preliminary selection of hypotheses and policy challenges for further exploration. The issues paper will be sent to the country for verification and consultation ahead of the site visits. The issues paper may also include a questionnaire for the country, as well as targeted requests for supplementary data in case the documents provided in the preparatory phase do not supply all the needed information. The deadline for returning responses and data will be agreed on a country-by-country basis.
- A **list of initial requests for site visits** (site visits list), which is informed by the issues paper and the selection of themes and policy areas in focus of the review. The list may include any counterpart deemed of relevance for the review, such as national and regional institutions, providers, social partners and civil society organisations, practitioners, students, etc. The list will be elaborated in consultation with the country. The country has a key role in developing this list, especially when the review team may not be aware which counterpart may be the best suited to provide information on a given topic or issue of interest.

The main objective of the **site visits** is to gather additional information, contextualise the existing information, and ensure that the review team has a clear understanding of policy and practice concerning lifelong learning, both from a systemic perspective and from the point of view of beneficiaries and stakeholders. The site visits are also meant to provide a unique opportunity to consult directly with stakeholders which may otherwise be outside of the mainstream of usual consultations, such as those located in rural or remote areas, people from disadvantaged but strategically important groups of learners, etc.

The site visits have the following steps:

- **Preparation and organisation of the site visits** by the national review coordinator. The geographic scope and duration of these visits will depend on the choice of counterparts, and on the focus and scope of the review in each participating country. For instance, in some countries and for some stakeholders, it may be sufficient to organise meetings in the capital in the course of few days, while in other countries, it may be necessary to ensure a broader coverage with field visits to regions, discussions with beneficiary groups in situ, etc. In such a scenario, the site visits may take longer and involve local travel logistics, etc.

In addition, the plan for the site visits also includes an indication of the format of conversations with the counterparts included in the plan. In principle, the site visits depend primarily on semi-structured individual or group interviews as the main data gathering methodology. However, for some stakeholder groups and for the sake of feasibility, the conversation may take place in the form of focus group discussions, as needed.

- **Conducting the site visits:** during this step it may become necessary to adjust and complement the initial site visits plan as new information emerges and the team gathers recommendations for additional counterparts to meet (snowball effect).
- **Debriefing/presentation of preliminary results:** The site visits conclude with a debriefing meeting or event, which involves the national coordinating institution/body and relevant

stakeholders, and at which the review team shares a set of preliminary findings and conclusions to validate its observations before starting with the preparation of the review report.

Deliverables, validation, and follow-up

The third phase consists of the preparation of the policy review report and of the validation of the review report, which includes a discussion of follow-up options and recommendations.

The **policy review report** is based on the analysis of data and the collection of insights from national stakeholders. Its structure can vary between countries depending on the themes chosen, to ensure a clear and accessible presentation of findings and recommendations. At the same time, all reports will share a set of mandatory, uniform elements to ensure that they are consistent and have an instantly recognisable identity as reviews of policies for lifelong learning. These elements include:

- An **executive summary**, recapitulating the main issues and outcomes of the analysis
- An **introductory element**, which describes the background and scope of the review, provides a brief description of the review report, and provides relevant country background and an overview of lifelong learning in the country, including a map of stakeholders involved in lifelong learning by stake and responsibility
- A **reporting element**, which comprises chapters presenting the findings of the review by policy cluster and/or area within clusters (Table 6)
- A **follow-up/concluding element** featuring draft recommendations in response to these findings, structured by chapter, organised by recommended priority of implementation
- A **block with annexes** providing summarised information about the review methodology, the review team, the site visits, and the stakeholders consulted, as well as any other supplementary information of relevance

Once the draft country review is completed, it can be submitted for **validation and subsequent dissemination**. At this last step, ETF shares the draft report with the national coordinating institution/reference group for validation.

On that basis, the review process concludes with a consultation and dissemination event organised by the ETF in cooperation with the partner country, with the help and support of the review team. The objective is to disseminate the draft report, raise awareness about the review outcomes, and discuss the appropriateness and feasibility of policy recommendations with key stakeholders. Another feature of this event is to discuss the relevant ways to implement the recommendations and **possibilities of technical and financial support by the EU delegations and other active international organisations** in the country. The report and its recommendations are finalised after the dissemination and consultation event so that it can incorporate the conclusions of stakeholders regarding the recommended follow-up actions.

Summary of responsibilities for countries and their review coordinators

For the convenience of users, this section summarises the preceding sections regarding the involvement, contribution, and responsibilities of countries and national review coordinators in the process of reviewing policies for lifelong learning (Level 2 of the Torino Process framework).

Through their nominated national coordinators/coordinating institutions, countries participating in the reviews are in charge of the following:

- **At the stage of preparation for reviews:** nomination of a national review coordinator by exchange of official letters; formal expression of interest to undertake the review of LLL policies, which also includes information about the desired thematic focus of the review; submission of relevant documents and sources for the desk research.

- **At the stage of analysis and site visits:** provision of comments and inputs to the issues paper and of responses to the questionnaire and data requests by the review team (if any); preparation of a list of site visits in cooperation with ETF and the review team; preparation and organisation of the site visits (agenda for the site visits, support with the logistics, as needed); support in the identification of stakeholders for the debriefing meeting as well as co-hosting the meeting;
- **At the stage of validation and dissemination:** provision of comments and inputs to the final draft of the review report; support in the identification of stakeholders for the final validation and dissemination meeting, as well as co-hosting the meeting.

Sequence and timeline of Torino Process implementation in 2022

In 2022, the Torino Process commences with the nomination of national Torino Process coordinators and the launch of the Torino Process by the end of May.

For **Level 1**, this is followed by:

- The compilation of quantitative evidence and the composition of monitoring questionnaires by the end of July
- Provision of responses by countries by the end of September
- The validation and finalisation of responses in October
- The compilation and release of monitoring results in November/December of 2022.

For **Level 2**, the Torino Process launch is followed by:

- By the end of June, collection of expressions of interest from countries who may wish to participate in the first round of reviews of policies for lifelong learning in 2022/2023
- The formalisation of requests and preparation for the reviews, in particular the identification of themes and submissions of documents, between July and September
- Composition of the review teams by October
- Desk research in November-December
- Delivery of issues papers and commencing with the site visits in the first quarter of 2023

Annex 1: Areas, dimensions, and outcomes in focus of monitoring

Area A. ACCESS, PARTICIPATION, AND OPPORTUNITIES FOR LIFELONG LEARNING

Dimension A.1	ACCESS
Outcome A.1.1	<p>Access and attractiveness: initial VET</p> <p>This outcome captures the degree to which initial VET is an attractive educational choice in comparison with other learning alternatives, and whether that choice is accessible to various target groups of learners. When it comes to target groups, this may include specific fields of study to capture better gender segregation</p>
Outcome A.1.2	<p>Access and attractiveness: continuing VET</p> <p>This outcome captures the degree to which continuing VET, including tertiary VET where available, is an attractive choice in comparison with other skills development alternatives on post-secondary level and with non-formal alternatives, as well as whether that choice is accessible to various target groups</p>
Outcome A.1.3	<p>Access to opportunities for lifelong learning through labour market policies (ALMP); access to other opportunities for lifelong learning not included in outcomes A.1.1 and A.1.2</p> <p>This outcome captures the accessibility to lifelong learning opportunities provided through active labour market programmes and to other forms of lifelong learning for adults and youth in working age, including to learning opportunities in non-formal settings and enrolment to VNFIL</p>
Dimension A.2	PARTICIPATION
Outcome A.2.1	<p>Flexible pathways: vertical permeability</p> <p>This outcome strives to capture the vertical permeability of the education and training system vis-à-vis initial and continuing VET in terms of transition between successive stages of education and training</p>
Outcome A.2.2	<p>Flexible pathways: horizontal permeability</p> <p>This outcome strives to capture the horizontal permeability of the education and training system vis-à-vis VET in terms of possibility of transition between parallel tracks of education and training, and between formal and non-formal learning settings and to VNFIL</p>
Outcome A.2.3	<p>Completion of learning (graduation) in preparation of progression: to successive stages of education and training or to employment</p> <p>This outcome refers the degree of success of learners in VET in comparison with other education and training alternatives, as captured through retention rates, non-progression, and drop-out rates by type of programme and learning setting, graduation rates by type of programme and learning setting, including non-formal settings and VNFIL.</p>

Area B. QUALITY OF LIFELONG LEARNING OUTCOMES

Dimension B.1	QUALITY AND RELEVANCE
Outcome B.1.1	<p>Key competences for lifelong learning and quality of learning outcomes</p> <p>This outcome captures the extent to which the education and training system succeeds in the provision of basic skills and key competences for learners in formal education, as captured by regular international surveys and international assessments of learning outcomes and competences</p>
Outcome B.1.2	<p>Adult skills and competences</p>

	This outcome captures the extent to which adults in working age dispose of basic skills and key competences, as captured by regular international surveys
Outcome B.1.3	Participation in work-based learning This outcome reflects the pragmatic relevance of initial and continuing VET programmes through the lens of participation in work-based learning and the share of programmes with outcomes/objectives that include a WBL component
Outcome B.1.4	Employability of learners This outcome refers to the labour market relevance of lifelong learning opportunities as captured through evidence of labour market outcomes of graduates from initial VET, continuous VET, and other forms of lifelong learning with a VET component
Outcome B.1.5	Participation in career guidance and education This outcome strives to capture the shift from provision of information about professions and education programmes at transitions points towards developing career management skills of individuals from early schooling onwards that enable them to manage their manifold transitions over a lifetime within and between education and work
Dimension B.2	EXCELLENCE
Outcome B.2.1	Excellence in pedagogy and professional development This outcome captures the extent to which excellence in teaching and training is an acknowledged policy priority, as well as the extent to which its implementation is bearing fruit across the education and training system, including in the domain of professional development of teachers.
Outcome B.2.2	Excellence in programme content and implementation This outcome captures excellence in the domain of work-based learning, excellence in prioritising greening, as well as excellence of learning outcomes - the latter as seen through international assessment surveys and other relevant sources, as well as through the labour market outcomes of youth and adult graduates
Outcome B.2.3	Excellence in governance and provider management This outcome captures the presence of examples of excellence in the domains of financing, leadership, and governance, as well as the extent to which these examples are systemic (or not)
Outcome B.2.4	Excellence in social inclusion and equity This outcome captures the presence of examples of excellence in the domain of equity and social inclusion in education and training, as well as the extent to which these examples are systemic (or not)
Dimension B.3	INNOVATION
Outcome B.3.1	Systemic innovation in providing access to opportunities for lifelong learning This outcome captures the presence of innovative practices and policy solutions in the domain of access to opportunities for lifelong learning, and the extent to which they are systemic (or not).
Outcome B.3.2	Systemic innovation in promoting participation and graduation This outcome captures the presence of innovative practices and policy solutions in the provision of support for participation in (and graduation from) opportunities for lifelong learning, and the extent to which they are systemic (or not)
Outcome B.3.3	Systemic innovation in boosting quality of learning and training outcomes This outcome captures the presence of innovative practices and policy solutions for raising the quality of learning and training outcomes, and the extent to which they are systemic (or not)

Outcome B.3.4	Systemic innovation in raising the relevance of learning and training outcomes This outcome captures the presence of innovative practices and policy solutions for raising the relevance of learning and training outcomes, and the extent to which they are systemic (or not)
Dimension B.4	RESPONSIVENESS
Outcome B.4.1	Relevance of learning content: green transition This outcome captures the extent to which curricula for youth and adults consider themes of significance for sustainability and climate change awareness, including “green skills” for sustainable economies
Outcome B.4.2	Relevance of learning content: digital transition This outcome includes the extent to which learners are provided with basic digital skills, and the extent to which curricula for youth and adults incorporate themes concerning digitalisation
Outcome B.4.3	Responsiveness of programme offering This outcome captures the degree and speed of responsiveness of initial and continuing VET systems to the needs of the labour market and to other changes concerning demography and socio-economic developments

Area C. SYSTEM ORGANISATION

Dimension C.1	MANAGEMENT AND ADMINISTRATION
Outcome C.1.1	Data availability This outcome refers to the availability of administrative and big data as covered by Level 1 of the monitoring framework, participation in large scale international assessments, as well as technical capacity to generate/manage evidence to support monitoring and improvement
Outcome C.1.2	Participatory governance This outcome captures the degree of involvement of the private sector and other external stakeholders in the creation and operation of lifelong learning opportunities through initial and continuing VET
Outcome C.1.3	Reliable quality assurance and public accountability This outcome foresees that quality assurance mechanisms and accountability arrangements are in place in IVET and CVET, such as performance assessment of providers and public posting of assessment results and financial reports, availability of a register/database of qualifications
Outcome C.1.4	Professional capacity of staff This outcome monitors the availability of qualified staff in leadership and other key administrative roles on provider level in IVET and CVET
Outcome C.1.5	Internationalisation This outcome monitors the degree of internationalisation in initial and continuing VET, such as internationalisation of quality assurance arrangements, curricular content, qualifications (i.e. recognition of international credentials, awarding bodies being active beyond their country of origin, etc.)
Dimension C.2	RESOURCING
Outcome C.2.1	Adequate financial resource allocations and use This outcome captures the adequacy of financial resources invested in initial and continuing VET relative to other segments of education and training in terms of level of investment and allocation, as well as the degree of diversification of funding between public and private sources

Outcome C.2.2	<p>Adequate human resource allocations and use</p> <p>This outcome captures the efficiency of human resource management in initial and continuing VET in terms of allocations and use, such as rate of retention of teachers and trainers, shortage of teachers and trainers, teacher-student ratios, etc., income levels compared to average national income, etc.</p>
Outcome C.2.3	<p>Adequate material base</p> <p>This outcome captures the extent to which the material base for learning and training in initial and continuing VET relative to other segments of education and training is adequate, including learning and training materials, which is supportive of and promote effective teaching, training, and learning</p>