

CROSS-COUNTRY ANALYSIS OF THE MAPPING OF SKILLS STRATEGIES

Consolidated Cross-Country Report
27 ETF Partner Countries



Today's Presentation

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Background and Scope

Why this matters

Where strategies are coordinated, labour market linkages are clearer, public spending more efficient, lifelong learning pathways more continuous.

Where coordination is weak: parallel KPI systems, duplicated financing, fragmented governance.

Central question

To what extent are education and skills agendas coherently articulated and coordinated across ETF partner countries?
What patterns emerge across the policy documents currently in force?

Coverage

27 ETF partner countries across Western Balkans, Eastern Partnership, Southern Mediterranean, Central Asia.
Initial mapping: 254 documents.
99 selected for detailed analysis in agreement with ETF.

27 ETF Partner Countries

Western Balkans (6)

Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, Serbia

Eastern Partnership (5)

Armenia, Azerbaijan, Georgia, Moldova, Ukraine

Türkiye (1)

Türkiye

Southern & Eastern Mediterranean (10)

Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine, Syria, Tunisia

Central Asia (5)

Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan

Document set per country

99 documents from mapping of 254; typically 3 to 6 per country.

Two-Stage Analytical Methodology

Applied sequentially across the 27 country sets.



Skills Analytical Framework

Applied per document

5 criteria

- Policy objectives
- Planned activities
- Key performance indicators
- Assigned budget
- Monitoring & evaluation

Alignment Framework

Applied per country set

8 dimensions (H/M/L)

- Strategic vision
- Governance & coordination
- Target groups
- Implementation instruments
- Financing
- Monitoring & evaluation
- Lifelong learning
- Donor / innovation

FINDINGS FROM THE SKILLS ANALYTICAL FRAMEWORK

Cross-country trends by
document type

Findings by Document Type

Education Strategies

System-oriented; limited labour market linkage.

Focus on quality, inclusion, governance, curriculum.

Foundational skills better embedded than vocational.

VET / Skills Strategies

Most operationally developed document type.

Strongest KPIs and employer linkages where current.

Carries the strongest alignment potential.

Employment Strategies

Labour-market activation orientation.

KPIs typically strongest of any document type.

Supply–demand linkage articulated; mechanisms less developed.

Cross-Cutting Themes: Digital & Green Skills

Digital Skills

Most consistently treated theme in the sample.

Present across all three document categories and the vast majority of country sets.

Almost every country has a dedicated digital agenda or transformation strategy.

Universal recognition coexists with fragmented delivery.

Lowest-friction lever for moving from rhetorical to operational alignment.

Green & Sectoral Skills

Awareness without operational response.

Green/sectoral strategies frequently identify future workforce needs.

Less consistently translated into operational programmes within strategic frameworks.

Typical pattern: strategy identifies decarbonisation; specific programmes often outside core framework.

Where green-skills delivery exists, project-based and donor-funded.

ALIGNMENT TYPOLOGY

Country-level findings from the
Alignment Framework

Three Alignment Types

Type A: Operational VET/skills framework

Operational VET/skills framework connecting wider policy architecture

12 countries

Type B: Strategically aligned, segmented

Skills recognised as strategic priority; strategies operate on parallel tracks.

9 countries

Type C: Structurally constrained

Structural conditions shape the policy framework: conflict, fragility, or older legal instruments.

6 countries

Table 2: Alignment Scores (Type A)

Country	SV	Gov	TG	Imp	Fin	M&E	LLL	Don
TYPE A — Partial alignment with an operational VET/skills framework (12 countries)								
Albania	High	Low	Medium	Medium	Medium	Medium	Medium	High
Georgia	High	Medium	Medium	High	Medium	Medium	Medium	Medium
Israel	High	Medium	High	High	Medium	Medium	Medium	High
Jordan	Medium	Low	Medium	Medium	Low	Medium	Medium	Medium
Kazakhstan	Medium	Low	Medium	Medium	Low	Medium	Medium	Medium
Montenegro	Medium	Low	Medium	Medium	Medium	Medium	Medium	Medium
Morocco	Medium	Low	Medium	Medium	Low	Medium	Medium	Low
North Macedonia	Medium	Low	Medium	Medium	Low	Low	Med–High	Low–Med
Serbia	Medium	Low	Medium	Medium	Low	Low	Medium	Low–Med
Türkiye	Medium	Low–Med	Medium	Medium	Low–Med	Medium	Medium	Medium
Ukraine	High	Medium	Med–High	Medium	Medium	Medium	High	High
Uzbekistan	High	Medium	High	High	Medium	High	Medium	Medium

Table 2: Alignment Scores (Type B & C)

Country	SV	Gov	TG	Imp	Fin	M&E	LLL	Don
TYPE B — Strategically aligned but institutionally segmented (9 countries)								
Armenia	Medium	Low	Medium	Medium	Low	Low	Low	Low
Azerbaijan	Medium	Medium	Medium	Medium	Low	Low	Medium	Low
Egypt	Medium	Medium	Medium	Medium	Low	Medium	Low	Low
Kosovo	Medium	Low	Medium	Medium	Low	Medium	Medium	Medium
Kyrgyzstan	Medium	Low	Medium	Medium	Low	Medium	Medium	Medium
Moldova	Medium	Low	Medium	Medium	Low	Medium	Medium	Low
Tajikistan	Med–High	Low	Med–High	Med–High	Low–Med	Low–Med	Med–High	Medium
Tunisia	Medium	Low	Medium	Medium	Low	Low	Medium	Low
Turkmenistan	Medium	Low–Med	Medium	Medium	Low	Low–Med	Medium	Low
TYPE C — Structurally constrained or aspirational alignment (6 countries)								
Algeria	Low	Medium	Low	Medium	Low	Low	Low	Low
Bosnia and Herzegovina*	Medium	Medium	High	Medium	Low	Medium	Medium	Medium
Lebanon	Low–Med	Low	Medium	Medium	Low	Low–Med	Low	Medium
Libya	Low	Low	Low	Medium	Low	Low	Low	Low
Palestine	Medium	Low	Medium	Medium	Low	Low	Low–Med	Low
Syria	Medium	Low	Medium	Medium	Low	Low	Low	Low

Three Enabling Factors for Stronger Alignment

01

EU accession prospect

Most consistent enabling factor.
Reporting obligations support indicator development. Western Balkans, Moldova, Ukraine, Kosovo.

02

Designated skills governance body

Shifts coordination from ad hoc to institutionalised. Jordan TVSDC, North Macedonia Human Capital Strategy.

03

Centrally coordinated reform

National development strategy or executive framework. Uzbekistan, Kazakhstan, Tajikistan.

Three Consistently Weaker Alignment Dimensions

Financing integration

Skills-specific budget lines mostly absent.

Exceptions: Palestine NES, Armenia.

Disconnects intent from delivery.

Joint monitoring & evaluation

Harmonised KPI systems rare.

Strongest in EU-integration countries.

Cross-strategy integration is the exception.

Donor engagement

Present as separate streams.

Rarely an integrated mechanism.

Unused alignment opportunity.

CONCLUSIONS

Five cross-cutting findings

Five Cross-Cutting Takeaways

01

Strategic vision is broadly shared; operational integration is not

02

VET/skills strategy is the practical foundation

03

Financing integration is the most consistent weakness

04

Joint M&E underdeveloped; EU accession prospect is the clearest enabler

05

Digital skills universally addressed, most under-leveraged

Five Priority Areas for Policy and Developing Partner Support

01

Strengthen the VET/skills strategy layer

02

Institutionalise inter-ministerial coordination

03

Develop shared KPI frameworks across strategies

04

Use digital skills as lead entry point for cross-sector alignment

05

Build integrated financing and monitoring infrastructure

THANK YOU

Cross-country analysis of the
mapping of skills strategies

