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THE EU AGENCY SUPPORTING COUNTRIES TO DEVELOP THROUGH LEARNING



MAKING ADULT LEARNING A REALITY FOR ALL

Legal and institutional arrangements in the EU enlargement area

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PREFACE

The thematic focus of this report is adult learning (AL), understood as an important part of lifelong learning (LLL). It includes both formal learning (i.e. linked to formal qualifications) and non-formal learning (in companies and other learning environments), including upskilling and reskilling, as well as the development of a broad range of skills, knowledge and competences for life and work.

To the extent that adult learning (AL) benefits citizens and is therefore a priority for EU policy[1], including in its external relations, it constitutes a core area of the ETF's work. At national level, many existing AL policy frameworks in ETF partner countries remain fragmented in terms of strategic planning, implementation, quality assurance, monitoring and evaluation. In some countries, they are also outdated and do not pursue the objective of LLL. As a result, adults often face limited and uneven access to learning opportunities in contexts characterised by persistent skills mismatches, shortages of future-proof skills and competences and underdeveloped lifelong learning systems.

Given its role to regularly monitor developments in education, training and labour markets to identify progresses and gaps, in 2025 the ETF launched work to examine the legal and institutional arrangements for AL in the EU enlargement area, specifically Albania, Bosnia and Herzegovina, Kosovo*, Moldova, Montenegro, North Macedonia, Serbia and Ukraine.

The research was anchored in the 'scaling challenge': participation in the enlargement area remains far below the EU's ambitions. Participation is also socially patterned, with learning opportunities benefiting more highly educated adults and therefore risking the widening of skills inequalities unless systems broaden access for all adults. At the same time, increasing participation alone is not sufficient. Ensuring the quality and relevance of adult learning means guaranteeing meaningful learning experiences that enable individuals to thrive in their personal lives and at work.

The resulting eight factsheets were guided by an analytical framework with three dimensions that allowed comparison across countries:

i. Strategies, policies and the legal framework;

ii. Institutional arrangements, governance models and financing, including monitoring and quality assurance; and

iii. Types of provision and support services.

[1] Council Recommendation on Upskilling Pathways: New Opportunities for Adults (2016); European Pillar of Social Rights (2017) and its Action Plan (2021); European Skills Agenda (2020); Council Resolution on a new European Agenda for Adult Learning 2021–2030 (2021); Union of Skills (2025) and the Council Recommendation on human capital in the Union (2026).

* This designation is without prejudice to positions on status and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence. For readability, this report uses 'Kosovo' to refer to 'Kosovo*' and 'countries' to refer to the eight economies covered.

In order to place the findings in a broader perspective and move beyond a description of institutional arrangements, the country mappings and cross-country analysis are complemented by a conceptual paper (European Training Foundation, 2026), which frames the 'adult learning urgency' as a system-level issue rather than a programme-level gap. This approach recognises that adult learning is difficult to govern because responsibilities are funding streams are dispersed not always coordinated; however, appropriate strategic and institutional support is necessary to guarantee that opportunities are distributed evenly and quality is assured (see Chapter 1.1). Together, these documents highlight the need for stronger lifelong learning systems, clearer governance arrangements, sustainable financing mechanisms and better coordination among stakeholders to expand participation and ensure high-quality AL opportunities. Additional demographic, technological and geopolitical factors only increase this demand for flexible, accessible AL pathways and stronger links to labour market and recovery policies.

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INTRODUCTION

1. THE URGENCY OF REFORMING ADULT LEARNING SYSTEMS

This report addresses a recognised 'scaling challenge': participation in adult learning programmes in several EU Member States and particularly in the eight countries in the EU enlargement area covered by the study remains far below the EU's ambitions; specifically, below the 2030 benchmark endorsed by Member States, which set the target that by that date at least 60 % of adults aged 25–64 should have participated in learning activities during the preceding 12 months (European Commission, 2024, 2025; see section 4.2 in this report)[2].

In 2022, the Adult Education Survey (AES) recorded an EU average participation rate of 46.6 % (equivalent to 78 % of the 2030 benchmark). The latest available estimates from the AES and Labour Force Survey (LFS) for the countries covered by this report show substantially lower rates, but also a significant social bias, in that learning opportunities tend to benefit more highly educated adults (ETF, 2022; 2023a, 2024a; OECD, 2025). This only reinforces existing skill disparities unless systems are able to broaden access for low-skilled adults and other disadvantaged groups. At the same time, it is not enough just to increase participation: adult learning (AL) must be of quality and relevant to the learner; learning experiences must be meaningful and enable individuals to thrive in their personal lives and at work.

Meanwhile, AL in the EU is in any case not organised according to a single model but delivered through 27 national systems, many of which continue to face challenges relating to coherence, coordination and governance.

Against this background, recent ETF monitoring and thematic work identify several interacting structural trends that make it increasingly urgent to expand AL and make access more equitable (ETF, 2024a).

1. The EU accession process is accelerating reforms in AL governance and the modernisation of vocational education and training (VET). Nevertheless, ETF monitoring continues to identify implementation gaps linked to fragmented governance, limited provider capacity and uneven financing. These conditions limit the potential to expand provision designed for adults (ETF, 2024a). This is evident in Bosnia

[2] The participation target is set out in the Council Resolution on a new European agenda for adult learning 2021–2030 (NEAAL 2030), adopted in 2021 (Council of the European Union, 2021).

and Herzegovina, Kosovo, Moldova and Ukraine, where barriers to participation coexist with limited or uneven AL provision and outreach (ETF, 2023a, 2024b and 2024c).

2. Demographic decline, increased mobility, and tightening labour markets are increasing both the need for and the potential returns from mid-career learning. Across much of the Western Balkans and Moldova, shrinking population cohorts and outward mobility coincide with hard-to-fill vacancies and structural skills mismatches. These trends increase the need to support employability throughout working life through flexible adult learning pathways, including modular provision and stronger links between adult learning and active labour market measures (ETF, 2024a).

3. The twin digital and green transitions, including the growing use of AI, are accelerating the pace of change and risk widening existing gaps in AL participation across the region. The growing use of AI in work processes is beginning to affect training driven by labour market needs, with potential implications for both the scale and focus of provision in sectors exposed to automation. Although evidence remains limited, these developments suggest that the governance of labour market training may need to adapt. ETF analysis of future skills needs indicates that rapid technological change is reshaping occupational profiles and demand for skills, increasing the importance and benefits of continuous learning beyond initial education (ETF, 2024b). In parallel, ETF work on the green transition indicates that decarbonisation requires a combination of technical, transversal, and mindset-related competences. This implies substantial reskilling needs in sectors central to the economies of the countries covered by this report, including energy, construction, and manufacturing. This need is particularly urgent for people working in SMEs and for workers with historically low levels of participation in training (ETF, 2023a). More broadly, sustainable competitiveness depends on continuous investment in people's competences and lifelong learning systems.

4. In the case of Ukraine, crisis, displacement and reconstruction are also shaping the demand for adult learning, while economic restructuring requires rapid labour reallocation and targeted responses. In this context, adult learning forms part of the recovery infrastructure by supporting reintegration[3], helping people adapt to local labour market needs and developing the skills needed in emerging sectors supported through the Ukraine Facility (ETF, 2023c; Ministry of Economy of Ukraine, 2024).

[3] In contexts of fragility following a crisis, adult learning can support the recovery of individuals and communities (ETF, 2024a).

1.1 Current approaches to adult learning

The concept of lifelong learning gained prominence in international policy debates in the 1970s (Faure, 1972; OECD, 1973) and has been an established element of policy in EU Member States since at least the 2010s (Milana, 2012; Holford, 2023). Yet, in many EU Member States and enlargement countries, adult learning remains undervalued compared to initial education, which has received the greater share of policy attention in recent decades. In particular, opportunities for adults to complete upper-secondary or obtain an equivalent qualification through 'second-chance' provision often remain limited. Non-formal education is also frequently shaped primarily by employer and market incentives rather than by a clear public policy strategy (Desjardins, 2020; Desjardins & Kim, 2023).

Adult learning is structurally difficult to govern. Responsibilities are typically distributed across several ministries (Education, Labour and Social Affairs) and levels of government. This dispersal of responsibility can weaken accountability, fragment funding streams and reduce policy coherence, ultimately limiting the capacity to expand participation and respond rapidly to reskilling and upskilling needs (Council of the EU, 2021; UNESCO, 2022; Sekmokas et al., 2024; OECD, 2023). Where AL provision is predominantly market-led, participation and benefits may be unevenly distributed (Brown et al., 2001; Desjardins & Ioannidou, 2020). Without targeted support, quality assurance and outreach, provision may favour individuals and firms that already have greater resources and stronger incentives to invest in training, potentially reinforcing existing inequalities in access and outcomes (Boeren, 2016; ETF, 2022).

Although everyday skills development takes place at work, not all workplaces are designed for adult learning. Contemporary skills development therefore requires working environments and organisational cultures that are set up to support workplace and on-the-job learning (Wijga et al., 2025).

Adult learning generates economic returns as well as social and health benefits that are too often overlooked by public policy. This is particularly reflected in the limited support available for learning unrelated to employment (Schuller et al., 2004; Hodge et al., 2025; Milana et al., 2025). Failure to recognise these wider benefits risks undervaluing adult learning as a means of promoting social integration, active citizenship and healthier societies.

Adult learning is increasingly expected to fulfil multiple functions. These include developing foundational skills (OECD, 2024), building transversal and key competences for labour market transitions, social participation, personal development and active citizenship; supporting green and digital skills development; and providing remedial education and upskilling. This widening scope has increased both the strategic importance of adult learning and the expectations placed on adult learning systems, strengthening the case for systemic reform.

Failure to strengthen adult learning carries significant economic and social risks, including:

- reduced freedom for adults to choose meaningful employment and life pathways;

- slower adoption and diffusion of new technologies when workforce skills fail to keep pace with structural change;
- greater difficulty moving between employment, unemployment and learning, or re-entering the labour market after inactivity, especially in the face of personal hardship or wider social disruption;
- widening inequality as the economic rewards for higher-level skills increase while adults with low skills continue to face barriers to training;
- weaker social cohesion and civic participation, as exclusion from learning opportunities compound marginalisation;
- fewer opportunities for personal development and for people to reimagine their life course and preferences, together with greater vulnerability to misinformation and hateful content;
- underuse of previous public investment in initial education when adults cannot adapt their skills to changing demand.

For the EU enlargement countries covered by this report, these risks may be amplified by a combination of structural economic transition issues, labour market constraints and demographic pressures (Myant & Drahokoupil, 2010).

1.2 Aim and scope of the report

This report examines how adult learning can be strengthened in the EU enlargement countries to increase adult participation in education and training, make access more equitable and support high-quality learning throughout adulthood. To do so, it examines adult learning systems (ALS) as a whole.

The report has three objectives:

1. to set out an analytical framework for ALS that can be used to interpret participation patterns, describe their governance functions and levels, and explain how governance affects system performance;
2. to provide insights based on a system-level analysis of key features of ALS governance and provision in Albania, Bosnia and Herzegovina, Kosovo, Moldova, Montenegro, North Macedonia, Serbia, and Ukraine;
3. to identify key policy priorities for the future development of ALS that may also be relevant to EU neighbouring countries and inform future policy dialogue among European Commission services, the ETF and its partner countries.

1.3 Report structure

The report is organised into three parts, corresponding to the three objectives set out above.

Part I establishes the conceptual and analytical foundations. Chapter 2 presents the ALS analytical framework and maps the main levels and functions of ALS governance.

Part II provides a cross-country assessment of the governance of adult learning systems in the countries covered by the report. Chapter 3 summarises adult learning strategies and policy frameworks. Chapter 4 examines institutional arrangements, governance models and financing. Chapter 5 analyses adult learning provision, including the main types of providers, access patterns and available support services. It also compares the countries using a set of EU benchmarking indicators derived from European adult learning policy frameworks, including the New European Agenda for Adult Learning, the European Pillar for Social Rights Action Plan and the Union of Skills.

Part III draws conclusions and presents selected recommendations for the future development of adult learning systems.

PART I. CONCEPTUAL AND THEORETICAL FRAMEWORK

2. ADULT LEARNING SYSTEMS AND THEIR GOVERNANCE

2.1 Adult learning systems

Adult learning systems or ALS are nationally specific configurations of institutions, policies and actors that, within a given country context, shape who learns what, when, where and how, throughout the course of their adult life (Desjardins & Kalenda, 2026fc). As an analytical concept, ALS shift attention away from individual programmes, policies or providers towards the wider ecology that generates, mediates and sustains adult learning opportunities. Three features of this ecology are analytically central.

Firstly, ALS extend well beyond public provision and state governance. They encompass the full range of relevant actors (e.g. employers, social partners, civil society organisations and private providers) whose combined decisions and practices structure the opportunity landscape for adult participation. As a result, a key function of public governance in adult learning is not simply to ensure provision, but to (co-)create the conditions that enable learning in the private domain. Secondly, ALS are not merely an aggregation of programmes, policies or providers: outcomes depend on how various policies and institutional arrangements interact over time, producing emergent patterns, such as the scope of participation, that no single element generates in isolation (OECD, 2026fc). Thirdly, ALS are highly heterogeneous. Their institutional configurations sit at the intersection of formal education systems, labour markets, welfare regimes and civic

sectors (Desjardins & Kalenda, 2025). This cross-sectoral embeddedness is precisely what makes coordination the central governance problem in adult learning.

Adult learning systems differ from country to country in several analytically distinct dimensions. They differ in the kinds of demand they generate for adult learning: the scale and composition of demand reflect occupational structures, life-course dynamics and the extent to which technological and social change create capability gaps that structured learning can address (Räis & Saar, 2017; Desjardins, 2020; OECD, 2025). They also differ in the learning opportunities that they present, ranging from formally accredited adult education and workplace training to community-based and civil society provision; and in the extent to which these diverse forms of provision offer coherent and accessible opportunities. Critically, countries differ in how they coordinate supply and demand: through information and guidance systems that help adults navigate available options; through micro-level referral pathways between services; and through stakeholder platforms and negotiated arrangements at the meso and macro levels (Desjardins & Kalenda, 2025; OECD, 2026fc).

These dimensions are shaped by the social circumstances in which ALS are embedded. Welfare-state traditions, industrial relations architectures, patterns of social stratification, as well as the political salience of adult learning as a policy domain all condition how systems emerge, evolve and shape learning outcomes (Saar et al., 2013a, 2013b). Comparative research consistently shows that ALS are deeply path-dependent: systems that have maintained stable policy orientations since the 1990s tend to exhibit stronger participation rates and greater equity of access than those marked by frequent political reversal or chronic under-resourcing (Desjardins & Kalenda, 2025). At the same time, ALS are not static. They respond, albeit selectively and unevenly, to technological disruption, demographic dynamics, labour-market restructuring and shifting political economies of skill (Kalenda, 2024; Nylander & Rubenson, 2025), which gradually change adult learning in terms of both demand and supply.

2.2 Governance of adult learning systems

Governance refers to the institutions, rules, and processes through which ALS are steered, resourced, and shaped. It includes the formal architecture of laws, strategies, and financing mechanisms, as well as the institutional arrangements that translate policy intent into practice. In this sense, governance is what can bring dispersed elements of ALS (e.g. diverse supply clusters, heterogeneous demand, and often fragmented coordination mechanisms) into a more coherent configuration. Governance is moreover embedding values, administrative culture and policy-making patterns that, although often tacit, influence ALS and lead to, for example, more or less centralisation, stakeholder involvement, transparency and accountability. For comparative reasons, these governance dimensions (value, administrative culture) have not been considered in the present ALS mapping.

Within this report, fragmentation of governance refers to the dispersion of responsibilities for adult learning across multiple institutions, policy domains and levels of governance, without sufficient coordination mechanisms to ensure coherent policy design, implementation and monitoring. Fragmentation may occur horizontally (across ministries, agencies or policy sectors such as education, labour and social affairs) and vertically (across national, regional and local levels), as well as between formal and non-formal provision. In practice, this results in overlapping mandates, gaps in accountability, inconsistent regulatory approaches and weak links between strategies, funding, provision and support services.

On the other hand, coordination does not refer to vertical control or hierarchical steering of ALS. Rather, it denotes horizontal coordination across institutions, policy domains and stakeholders involved in adult learning, including education, labour, employment services, social partners, providers and civil society organisations. Effective coordination therefore concerns the alignment of roles, information flows, procedures and responsibilities among actors operating at the same governance level or across sectors, rather than the concentration of authority at the centre.

The ETF mapping project identifies four structural pillars of ALS governance: (i) the legal framework, (ii) the strategic framework, (iii) institutional arrangements and (iv) financing mechanisms (DVV International, 2020; ETF, 2022, 2025; Hinzen & Baratov, 2025). Each of these shapes demand for adult learning, the supply of learning opportunities and, critically, the coordination between them. One prerequisite for all four pillars is that adult learning must first be constituted as a visible policy objective. In many countries, adult learning remains institutionally invisible: subsumed under schooling, dispersed across labour-market activation and social policy, or treated as a residual category without dedicated governance infrastructure (Benavot et al., 2022). Making adult learning governable means establishing it as a recognised policy domain with identifiable boundaries, designated authorities and stable resources, and as a social right. This recognition is not merely procedural: it determines whether cross-sectoral coordination is feasible and whether disadvantaged groups have any meaningful entitlement to support.

The **legal framework** provides the formal foundation through which adult learning is constituted as a recognised domain. It defines it, delineates responsibilities across ministries and levels of governance and legitimises a plural provider landscape, including public institutions, private training firms, employer-based programmes and civil society organisations. Where legislation privileges formal qualifications while giving limited recognition to non-formal or community-based provision, the scope of the system is correspondingly narrower. Legal provisions may also establish arrangements for the recognition of prior learning, a mechanism that is particularly relevant for adults whose learning has taken place outside formal education settings (OECD, 2023).

The **strategic framework** converts legal provisions into a prioritised, resourced and implementable agenda. This is where normative commitments concerning the purposes of adult learning (e.g. economic competitiveness, social inclusion and civic engagement) are made explicit and trade-offs are negotiated between them. Effective strategies treat adult learning as integral to a wider lifelong learning architecture (OECD, 2026fc),

are grounded in evidence about the national context (Sekmokas et al., 2024) and set measurable targets that enable monitoring and accountability (ETF, 2022; OECD, 2023). Crucially, they take a long-term view: countries that have maintained policy continuity since the 1990s have achieved stronger outcomes in both overall participation and equity (Desjardins & Kalenda, 2025).

Institutional arrangements determine whether governance operates in practice or remains confined to formal documents (Hinzen & Baratov, 2025). Role clarity across ministries, agencies, public employment services and non-state actors appears essential. So too are data and monitoring systems capable of tracking participation and outcomes across supply clusters (Grotlüschen et al., 2023; Sekmokas et al., 2024). Governments aiming to improve alignment between the demand for and supply of adult learning often identify interinstitutional coordination and cooperation with intermediary organisations as crucial. Additionally, they also deploy methodological approaches and policy tools such as target-group identification, outreach, guidance, skills assessment and validation, which can be analysed as integral components of the institutional arrangements that give structure to adult learning (OECD, 2023; Mania & Plechatsch, 2025). Social dialogue is a particularly significant dimension of institutional arrangements, given that ALS vary substantially in the extent to which stakeholders are included in governance (Desjardins, 2017). Where social partners (e.g. trade unions, employer organisations, or sectoral associations) and civil society organisations, including NGOs and community groups, have institutionally embedded roles, governance tends to produce more equitable outcomes and a broader conception of legitimate demand (Desjardins & Kalenda, 2025). Where employer voice predominates without countervailing stakeholder influence, provision tends to concentrate on immediate labour-market needs, often at the expense of foundational skills, civic education, and non-job-related learning (Erola et al., 2023; Milana et al., 2025). The composition and relative influence of stakeholders within a governance architecture act as a filter on demand: they determine which learning needs are heard, which are amplified into policy and which remain latent or neglected.

Finally, **financing mechanisms** translate governance priorities into operational capacity. In comparative research, ALS associated with higher participation and more even participation patterns often draw on diversified funding streams (e.g. combinations of public budgets, employer contributions and individual investment) that are distributed across demand-side measures, supply-side provision and coordination functions. Funding designs also vary in the extent to which they differentiate subsidy levels across population groups; some systems provide higher subsidies or fully publicly funded provision for groups facing greater financial barriers to participation (Desjardins, 2017).

Taken together, these four pillars constitute the key architecture of ALS governance. Each is necessary but insufficient on its own: legal provisions without strategic direction remain latent; strategies without financing remain aspirational; financing without implementation and monitoring capacity remains inefficient; and institutional arrangements without legal grounding and strategic coherence tend to fragment and drift. Effective governance requires these pillars not only to be individually robust but also mutually aligned and progressively adjusted as the system evolves.

2.3 Provision of adult learning

Organised adult learning provision is institutionally segmented and differentiated. It is most usefully conceptualised along a continuum of formality: at one end, formal adult education embedded in state-regulated systems that award recognised qualifications aligned with national frameworks; at the other, informal learning that occurs in everyday contexts, within families, communities and workplaces, without institutional organisation or official recognition. Between these poles lies a broad domain of non-formal provision: structured, intentionally organised learning in courses, workshops, seminars, and guided on-the-job training that does not carry a formal qualification but may nonetheless be systematically evaluated and purposively designed (European Commission, 2006; CLA, 2016). This continuum matters analytically because governance, financing, and coordination challenges differ substantially across it: formal provision is most tractable to state regulation; informal learning is most resistant to direct policy intervention; and non-formal provision often falls into governance gaps where responsibility is unclear and monitoring is most incomplete.

For conceptual and governance-related reasons, this report focuses on formal and non-formal learning. These forms of learning constitute the segment of adult learning most directly shaped by public policy, as they involve identifiable providers, programmes, funding arrangements and quality-assurance mechanisms. They also form the principal object of system-level monitoring by the European Union (Council of the European Union, 2021), whose comparative benchmarks are based solely on participation in organised learning.

Beyond the formality dimension, organised adult learning provision in contemporary societies can be understood as distributed across four principal institutional clusters, each anchored in a distinct governance logic and set of stakeholders (Desjardins & Kalenda, 2025). These clusters are not merely administrative categories; they are historically sedimented configurations that shape what learning is available, to whom, on what terms and with what forms of recognition. Understanding how these clusters are resourced, how they interact and which groups they reach or exclude is therefore essential to formulating tailored policies to increase adult participation across them.

The first cluster is **formal adult education**, comprising provision embedded in the regulated education system and closely tied to state apparatus, legally recognised standards and explicit statutory frameworks. Its institutional logic is based on the acquisition of credentials: learning yields formally recognised outcomes with portable value in labour markets and social life. In adult learning, this most often takes the form of CVET and second-chance routes for adults whose initial schooling was incomplete or interrupted. Governance is typically public and state-led, though the degree of marketisation varies sharply across countries (Popovič et al., 2021).

The second cluster situates adult learning within **welfare-regime institutions**, particularly social investment strategies and active labour market policies (ALMPs). Its institutional logic is redistributive and preventive: learning is framed as a policy instrument to mitigate social risks, reduce inequality, and support the inclusion of groups at risk

of labour-market marginalisation (Hemerijck, 2018). Provision typically takes the form of targeted courses and programmes for unemployed people, low-skilled workers and other disadvantaged groups. The scale and institutional maturity of this cluster depend heavily on the fiscal and administrative capacity of the welfare state and on the extent to which learning through ALMPs leads to formally recognised qualifications – a feature that demands close coordination with formal adult education institutions (Bonoli et al., 2025).

The third cluster embeds **adult learning in the labour market**; corporate training strategies, workplace learning and the institutional architecture of employment relations. Its institutional logic is instrumental: learning is organised around employer skill needs and the productive requirements of the economy (Brown et al., 2001; Hornberg et al., 2024). This makes it a core arena for workplace and job-related learning, but also one highly sensitive to occupational structure, labour demand and the initial skill composition of the workforce (Boeren, 2016; Wijga et al., 2025). Where employment attachment is weaker, provision narrows and benefits concentrate among those already well positioned. The cluster is strongly shaped by industrial relations. If union density, collective bargaining coverage and employment protection are relatively high, social partners can negotiate more stable and broadly accessible training arrangements (Rubenson & Desjardins, 2009). If these institutions are weaker, provision is more fragmented, company-specific and stratified with predictable inequalities by occupation, contract type and company size (Räis & Saar, 2017; OECD, 2025).

The fourth cluster captures adult learning rooted in the **civic sphere**: community organisations, voluntary associations, NGOs and forms of learning oriented towards personal development, cultural participation and democratic life. Its institutional logic is civic and humanistic, as opposed to approaches based on the acquisition of credentials or labour-market integration: learning is valued for its intrinsic contribution to individual flourishing, social cohesion and democratic participation. This cluster is often underweighted in system-level accounts that privilege welfare and labour-market logics, yet it can both respond to non-job-related learning demands and actively cultivate them (UNESCO, 2021).

These four clusters do not operate as sealed compartments. Their boundaries are permeable, their relationships vary systematically across national contexts and their interactions, whether as complements, substitutes or recurrent points of tension, are constitutive of the opportunity structure available to adult learners (Desjardins & Kalenda, 2025). For example, a strong civil society cluster may partially compensate for thin welfare provision in countries with limited ALMP infrastructure; a highly market-oriented formal education cluster may crowd out labour-market training by fragmenting the range of credentials. Conversely, tightly coordinated systems, in which formal education institutions, employers and social partners share governance responsibilities, tend to produce more coherent and equitable supply architectures than systems in which clusters evolve in institutional silos (Desjardins & Kalenda, 2025). The opportunity structure for adult participation in organised learning is not the simple sum of four parallel subsystems, it is the product of how those subsystems articulate with one another and are steered or neglected by the governance architecture that encompasses them.

PART II. CROSS-COUNTRY ANALYSIS

To guide the comparative analysis, the evidence collected through the eight country factsheets is used to address a set of analytical questions that link the conceptual framework set out in Part I with the empirical findings presented below. These questions help clarify how the cross-country evidence is interpreted, in order to assess the functioning of adult learning systems across the countries analysed:

1. to what extent is adult learning constituted as a coherent policy domain within national legal, strategic and policy frameworks and embedded within a lifelong learning perspective?
2. how far do governance arrangements, institutional coordination, financing mechanisms and quality assurance frameworks support the coherence, sustainability and equity of adult learning systems?
3. to what extent do existing forms of provision and support services respond to the diverse needs of adult learners, labour market demands and broader social objectives?
4. what common patterns, structural constraints and cross-country variations emerge from the comparative evidence and what do they reveal about the development and functioning of adult learning systems?

3. CONTEXT AND METHODOLOGY OF CROSS-COUNTRY ANALYSIS

The cross-country analysis is based on the mapping exercise carried out in 2025 by ETF in the EU enlargement area: Albania, Bosnia and Herzegovina, Kosovo, Moldova, Montenegro, North Macedonia, Serbia and Ukraine. Eight factsheets (ETF, 2026a, 2026b, 2026c, 2026d, 2026e, 2026f, 2026g, 2026h) were prepared by country experts as an evidence collection of factual information on the current status of adult learning systems, guided by three analytical dimensions as per the defined analytical framework and its guiding questions (see Annex):

i. strategies, policies and the legal framework;

ii. institutional arrangements, governance models and financing, including monitoring and quality assurance;

iii. types of provision and support services – so that information could be compared consistently across countries.

Based on these dimensions, this report maps and analyses data from all eight countries to provide an overview of AL, explain how it is structured and delivered and identify policy and delivery challenges to be addressed in the context of EU accession. It mostly focuses on public policies and initiatives, with less coverage of company-based or civil society-led activities. The factsheets also collected information relating to a set of EU benchmarking indicators regarding adult learning.

The analysis aims to contribute to debates on AL at national, regional and international levels. Its findings will also guide the ETF's AL activities in the countries concerned and inform EU policy dialogue and funding opportunities in the field of human capital development.

This part of the report analyses country-specific information from the factsheets concerning: (i) legal frameworks, strategies and policies for adult learning, (ii) institutional arrangements, governance models and financing and (iii) provision and support services.

3.1 Analysis of adult learning in the EU enlargement area

A mixed-methods approach was used to create the factsheets, combining information from a wide range of sources and using different techniques, including working with both quantitative and qualitative data. The research took place in phases:

- preparatory desk review: evidence collection of official documentation, such as legislation, strategies and policy documents, as well as official statistics and data (also using the ETF country dataset on AL);

- data collection interviews: field work encompassed preliminary and data collection interviews with relevant stakeholders, individually or in groups, to gather their views and up-to-date information on adult learning;
- validation: a validation procedure[4] involving representatives of State institutions responsible for adult learning and country experts (where applicable) for reviewing the draft factsheets concluded the mapping;
- analysis of findings: following a content analysis method with the support of Microsoft Co-Pilot 365, the extensive country information presented in the factsheets was systematically compared, cross-analysed, summarised and presented in the different summary tables in this report;
- production of country factsheets.

Detailed information on the mapping exercises by country may be found in each factsheet and their Annexes.

The main objective of this report is to present the status of adult learning systems in the EU enlargement area, considering the analytical perspective presented in Part I, which takes governance and provision as the main elements of this analysis. The analysis will report both on the 'design' (understanding, for instance, the level of maturity in adopting specific strategies, legal actions, or policies) and implementation levels (concrete results being achieved and systematically monitored at country level). The next sections of this report present summaries of the developments in the eight ALS in terms of the three analytical dimensions used to produce the factsheets, as well as illustrations of examples of countries that are considered good elements to showcase in this domain. Infographics and tables are used to present comparative information and data deriving from the cross-country analysis. Challenges faced across the countries are also explored.

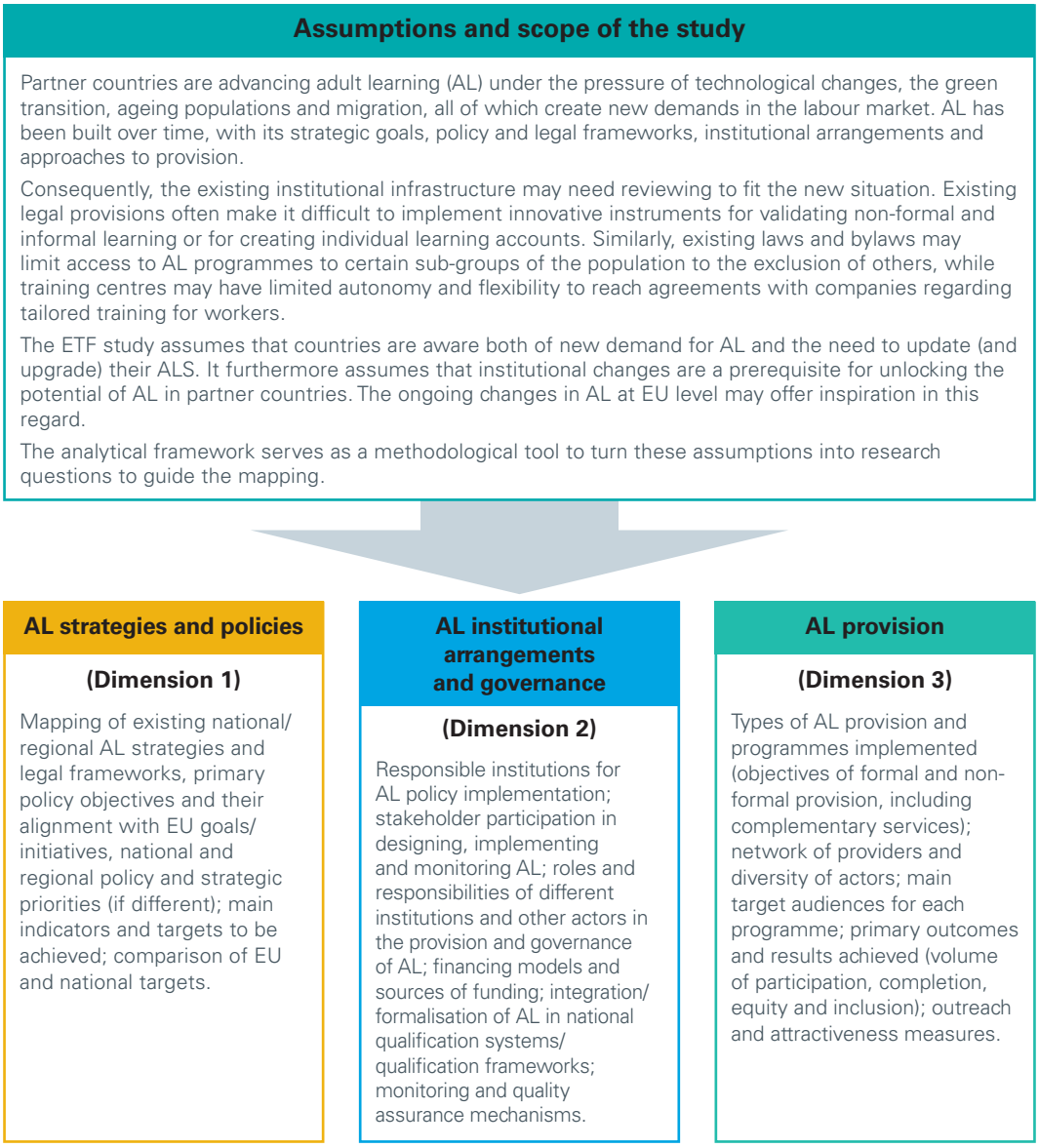
An important methodological caveat concerns the uneven evidence base across the countries included in the analysis. While cross-country comparability was maximised through the use of a common template and analytical framework, the underlying evidence varied in scope, depth and reliability. In most cases, analysis was supported by relatively extensive official documentation, available statistical sources and monitoring arrangements; where this was not the case, it relied more heavily on expert judgement, qualitative accounts and incomplete or weakly institutionalised monitoring systems. Accordingly, the comparative analysis should be interpreted with due caution: it offers a structured synthesis of the best available evidence rather than a comparison grounded in fully equivalent empirical foundations. The findings presented in the comparative chapters should therefore not be read as equally robust across all countries and dimensions. Where the empirical basis is weaker, the analysis should be regarded as indicative rather than conclusive. At the same time, the absence of reliable participation data, outcome measures or monitoring mechanisms constitutes an analytically important finding in its own right, as it signals institutional weaknesses in the governance and steering of adult learning systems.

[4] The validation procedure was not implemented in Bosnia and Herzegovina and Ukraine. In all other cases, it aimed at collecting stakeholders' opinions about the completeness and accuracy of information contained in the factsheets. Validation interviews (individual or group ones) took place either in person or online.

3.2 Methodological approach and analytical dimensions

The analytical dimensions used for the mapping exercise (see Annex) and its rationale follows the defined approach for the elaboration of the country factsheets as per the figure below.

Figure 1. Analytical framework for the composite review of adult learning in EU enlargement area



Source: European Training Foundation.

3.3 Operational features of the mapping exercise

The factsheets were produced in 2025 by a team of local experts with consolidated experience on adult learning and reviewed by an international expert with extensive experience in lifelong learning policies and systems, and by the ETF team of experts in charge of this activity. The data collected reflects country developments up to September 2025.

The country experts followed the same report template for elaborating the factsheets. This enabled them systematically to compare the information gathered across countries for the creation of this report. A semi-pilot exercise was conducted in North Macedonia to be used as an example for the other seven countries, which followed the same methodology and process and used the same data collection tools.

Even in the cases of Bosnia and Herzegovina and Ukraine, countries that face very specific conditions, the template proved to be helpful and was adjusted where necessary to facilitate completion of the data and information collection. Country context sections at the beginning of each factsheet helped to contextualise country specificities. The validation procedure was not completed in Bosnia and Herzegovina and, due to the current circumstances in Ukraine it was replaced there by a consultation with key officials from the Ministry of Education and Science.

The factsheets were prepared in English and translated into the local languages. The final versions can be downloaded from the ETF website[5].

[5] Adult learning in Albania | ETF; Adult learning in Bosnia and Herzegovina | ETF; Adult learning in Kosovo | ETF; Adult learning in Moldova | ETF; Adult learning in Montenegro | ETF; Adult learning in North Macedonia | ETF; Adult learning in Serbia | ETF; Adult learning in Ukraine | ETF.

4. ADULT LEARNING STRATEGIES AND POLICIES

4.1 Strategic landscape in adult learning

This chapter covers analysis of the strategic, legal and policy frameworks, emphasising progress in the development of strategic alignment with EU policies and frameworks alongside priorities in the adult learning (AL) sub-sector in the EU enlargement area. The main findings from the country factsheets highlight the following.

- In most of the countries, adult learning is framed by existing education strategies or wider intersectoral strategies covering employment and skills development, digital skills and so forth. North Macedonia and Montenegro notably have specific adult learning strategies and action plans, respectively. These strategic documents are broadly linked to or inspired by EU policy frameworks and some actions are interlinked with the Growth Plan[6] interventions recently adopted in the different countries.
- Legal arrangements covering ALS are typically approved as primary legislation, although in some countries there is a lack of adoption, fragmentation, or incomplete secondary legislation in concrete areas of intervention, which has been limiting implementation of some of the policies designated as priorities.
- Policy priorities for ALS development in the eight countries vary according to the national contexts, though in many cases they show strong alignment with EU policy priorities. This is the case, inter alia, with the development of validation arrangements and micro-credentials; the inclusion of adult education and training offers among the overall lifelong learning opportunities available to citizens and the linking of different types of provision and qualifications.
- Participation rates in adult learning are extremely low across most of the EU enlargement area, and the set national targets (where they exist) are overly realistic considering the real pace of progress and implementation gaps.

Based on the evidence gathered in the factsheets, it is possible to conclude that vertical strategic and policy alignment with EU policy priorities is to a certain extent an exception in the eight countries, especially when it comes to their practical application. EU instruments such as micro-credentials or validation of non-formal and informal learning (VNFIL) are mentioned and sometimes adopted but implementation is very limited due to a variety of factors.

For example, in Kosovo, governance of adult learning is fragmented. Its heavy legislation is seen as an obstacle to smooth alignment between strategies and policy implementation, leading to low participation of adult learners. In Ukraine, non-formal adult education is excluded from quality assurance mechanisms, while fragmented governance means a lack of coherent intervention throughout the different regions, exacerbated by the consequences of the military conflict since 2022. In Moldova, the implementation lag is mainly due to the absence of secondary legislation, while in Serbia there is only a partially updated legal framework and limited intersectoral coordination. In North

[6] Growth Plan for the Western Balkans – Enlargement and eastern neighbourhood

Macedonia, the legal framework was being completed at the time of data collection, with the ongoing approval of several bylaws.

Most countries reference adult learning within broader skills/education frameworks and link them to other employment or digital strategies that cover different initiatives for upskilling and reskilling of workers. Adult learning as a distinct sub-sector is only partially operational and there are ongoing misalignments between strategy, enabling legislation and delivery mechanisms.

North Macedonia is a group outlier in terms of design of the adult learning sector provisions and strategy, with a 2025 Law on Adult Education and an Adult Education Strategy 2025–2030 that explicitly link VNFIL, micro-credentials and guidance to EU agendas, offering clearer pathways from policy to delivery. This strategy is linked to the current overall Education Strategy and its successor for the period 2026–2032, currently in its formulation phase.

Box 1: Adult Education Strategy 2025–2030 of the Republic of North Macedonia

The Adult Education Strategy (2025) was developed within the framework of the EU-funded project led by the Adult Education Centre (AEC) entitled 'Implementation of the European Adult Learning Agenda in North Macedonia' (2024–2025), as a measure to support the country in facing and overcoming challenges such as ageing population, persisting skills mismatch and high rates of emigration[7].

The main goals of the strategy are to increase the participation and inclusion of adults in LLL by expanding access to adult learning (AL), increasing financial support for AL, promoting innovation and digital transformation, enhancing the professional development of AL staff and strengthening monitoring as a prerequisite of quality assurance. The strategy places special emphasis on the current challenges of the AL sub-sector, such as opening access to vulnerable groups and building synergies with relevant actors, particularly the business community and its international connections. Therefore, it is closely aligned with the European Skills Agenda and the Union of Skills Communication and complies with the national level legal framework for skills development policies.

It sets a target of 35 % of the adult population being enrolled in adult education (both formal and non-formal), of which 20 % of the participants will belong to vulnerable groups and 20 % will be over the age of 50.

The strategy envisages regular evaluation and/or monitoring of results. No progress report or evaluation study of the new strategy is currently available.

Source: adapted from ETF, 2026f.

[7] The number of people emigrating in 2024 was highest among the population aged 35-39 years, followed by those aged 40-49 (Makstat Database).

Having a dedicated adult learning strategy is important as it gives the sector visibility and specific policy directions, as exemplified by North Macedonia. Other observed approaches to foster the relevance and visibility of AL within the education sector and to garner greater attention from the government and other stakeholders regarding these policy domains are: integrating AL into other wider strategies as is the case in Albania (National Employment and Skills Strategy 2030); having a dedicated action plan as in Montenegro (Adult Education Plan 2025–2029); or formally regulating AL as is the policy in Moldova (Regulation on Adult Education – GD No 222/2024). There is no one-size-fits-all solution, considering that the design and adoption of strategies in some countries is also driven or supported by donors' intervention, as in the case of Kosovo, allowing AL to gain its space in the education and training reform agendas.

The level of readiness of these countries to systematically collect and use the EU benchmarking indicators defined for adult learning and related areas was also analysed. In most cases, either no data besides PISA results was being systematically and officially collected for the indicators identified (as in the case of Moldova and Montenegro, which relied only on administrative data, and Ukraine, which recorded only the LLL participation rate), or there was misalignment in the reference time frames or age groups.

4.2 Measuring adult learning

The relevant EU-level targets for adult learning, i.e. participation in education and training of adults aged 25–64, are that:

- by 2025, at least 47 % of adults aged 25–64 should have participated in learning during the last 12 months (Council Resolution on the European Education Area);
- by 2030, at least 60 % of all adults should be participating in training every year (2021 European pillar of social rights Action Plan)[8].

There are two main EU surveys measuring participation of adults in education and training: the Adult Education Survey (AES) and the Labour Force Survey (LFS):

Table 1: Available EU sources of internationally comparable data on participation in AL

Survey	Scope	Frequency
AES	Participation in LLL in the *last 12 months*	every 5–6 years
LFS	Participation in education and training in the *last 4 weeks*	a quarterly survey
	Participation in education and training in the *last 12 months* (new indicator since 2022)	every 2 years

Source: authors

[8] measuring_participation_in_adult_learning_new_targets_methods_and_data.pdf

The data source initially identified to assess such targets was the AES, which captures participation in LLL over the previous 12 months. This survey would provide a robust basis for assessing the phenomenon of interest: it is dedicated to participation of people in education and training (as opposed to the LFS which primarily focuses on the current state of the labour market); it has a comprehensive reference period of measurement (the last 12 months); it covers categories of learning (i.e. non-formal education and training includes the category 'guided on-the-job training'), which the LFS excludes. For the methodological reasons mentioned, LLL participation reported through the AES tends to be significantly higher than within LFS. However, the survey is carried out only every five to six years, which makes it difficult to use it for regular monitoring and progress measurement in the EU enlargement area.

However, due to the low frequency of the AES, a new indicator was introduced in the LFS to collect biannual data on adult participation in education and training in the last 12 months. Since the latest data for the new LFS indicator are from 2024, the traditional LFS indicator (participation in the last four weeks) is used as a proxy for measuring EU targets, to ensure frequent and recent data availability.

Participation of adult learners in education and training in the last four months, per LFS (Table 1) remains very low in most of the countries that have data available that is comparable with EU benchmarking indicators; typically less than about 3 % of adults participating in lifelong learning in the past four weeks, while in Serbia participation is slightly above that figure at 5.2 %. As regards participation over the last 12 months, the latest LFS figures are available for 2024 and they are slightly higher but still far from the EU target defined as '*at least* 60 % of all adults should be participating in training every year by 2030'. All countries record values below 5 % except for Serbia, which has 19.3 %.

At national level, half of the countries (Albania, Bosnia and Herzegovina, North Macedonia and Serbia) set national targets for adult participation in education and training for 2025 and/or 2030 but these were set using different indicators (AES or LFS).

Table 2. Participation in adult education and training (ages 25–64), in the last 4 weeks and in the past 12 months (%)

Area/country	Participation rate, last four weeks (LFS, 2025)	Participation rate, last 12 months (LFS, 2024)
EU average (27 countries)	13.7	28.4
Albania	2.1	No data available
Bosnia and Herzegovina	1.8	2.2
Kosovo	2.3 (2024)	No data available
Moldova	3.2	No data available
Montenegro	2.7	4.2
North Macedonia	2.6	3.7

Area/country	Participation rate, last four weeks (LFS, 2025)	Participation rate, last 12 months (LFS, 2024)
Serbia	5.2	19.3
Ukraine	No data available (0.5 in 2021)	No data available

Source: LFS, National statistical offices
Notes: data for the column 'Participation rate in the last four weeks (2025)' for Albania, Kosovo, Moldova and Montenegro was provided to ETF by the national statistical offices.
Data for the column 'Participation rate in the last 12 months (2024)' for Montenegro was provided to ETF by the national statistical offices. Participation refers to involvement in formal or non-formal education and training during the previous 12 months. For the EU enlargement area, data availability differs by country and survey wave.

In a context where systematic and comparable statistical data collection on adult learning is uneven, and where available resources may limit monitoring capacity, countries often rely on qualitative goals that describe planned policy measures, whereas quantified outcomes are not always set. This is also linked to a broader mismatch between the indicators available, including those foreseen at EU level, and the themes covered by national strategies and donor-supported policy commitments. As a result, although countries may participate in adult learning data collection exercises such as surveys, the information available often does not fully capture the policy dimensions that national strategies and monitoring frameworks seek to assess. In this context, comparisons between national data and EU-level indicators should be approached with caution. Variations in definitions, data sources, monitoring capacities and policy objectives mean that apparent differences in performance may partly reflect methodological and contextual factors rather than genuine differences in adult learning outcomes.

As part of a broader pattern of disconnect between evidence and planning, national targets are also sometimes set without sufficient consideration of available data, resources and implementation readiness in adult learning. As a result, some targets may be difficult to monitor meaningfully because their scale and ambition are not sufficiently grounded in evidence, for example when strategies aim to double, triple or otherwise sharply increase the participation of diverse groups of adult learners within a narrow implementation period.

The existing limitations in data availability should be understood not only as technical constraints affecting comparability. They also constitute substantive findings about the maturity of adult learning systems. Where countries lack reliable participation data, outcome tracking, or systematic monitoring of non-formal learning, this not only weakens the empirical basis for assessment but also points to limited governance capacity. In such contexts, public authorities face greater difficulty in identifying unmet needs, targeting resources, evaluating policy effects and steering reform in a strategic and accountable way. One policy implication is that, where participation remains very low and implementation capacity is limited, the immediate priority may be to establish the basic enabling conditions for expansion. The key components in such a scenario

would be reliable monitoring, clearer governance arrangements and more sustainable financing, before setting or scaling highly ambitious participation targets. In countries with more developed system foundations, the priority may shift towards improving access, outreach, validation and recognition mechanisms. This points to the need for differentiated sequencing of reform, rather than assuming a uniform pathway across all countries. The EU enlargement countries have developed their AL strategies building on respective strengths and context, therefore diverse approaches can be observed. Their alignment with EU recommendations or policy directions is currently steered by the accession process and may accelerate given the increased prioritisation of AL within the EU. Moreover, even if some of the countries refer to EU policy initiatives as policy directions, their implementation remains weak, as is shown in the following chapters.

4.3 Legal frameworks and their alignment with strategic orientations

The legal foundations for adult learning show considerable progress across countries, with several establishing comprehensive and modernised frameworks well-articulated within national education, lifelong learning and employability agendas. Albania, North Macedonia, Moldova and Montenegro exhibit the most consolidated legal-strategic alignment, while also containing the more comprehensive frameworks covering formal, non-formal and informal learning.

However, non-formal and community-based learning remain understated in the legislation of several cases (e.g. Moldova, Kosovo, Bosnia and Herzegovina, and Ukraine), leaving significant components of adult learning without adequate legal clarity, quality assurance mechanisms or pathways for recognition. These gaps limit the capacity of adult learning systems to expand beyond formal (typically CVET) offers, as well as to fully implement a wider range of lifelong learning options that would increase adult learners' participation.

The analysis identified two groups of countries. The first demonstrates a trajectory towards institutionalisation of lifelong learning, increasing convergence with EU approaches to validation, flexible provision and pathways for adults. Albania has developed a high-integration model in which VET, qualifications, employment promotion and adult learning/lifelong learning fall within a coherent legislative architecture, further strengthened through recent bylaws on the accreditation of VET providers and VNFIL. North Macedonia combines an aligned legal base with two complementary national strategies and digitalised procedures for programme verification. Moldova's Education Code, Adult Education Regulation and Education Strategy 2030 collectively embed adult learning as a structural component of the system, supported by EU-linked reform agendas. Montenegro's 2025 reforms similarly modernised its Adult Education Law, embedding micro-qualifications, flexible pathways and rights to first qualifications within a broader Education Reform Strategy.

Box 2: Normative framework of Adult Education in Montenegro

The Law on Adult Education (2025) regulates both formal and non-formal education for adults, addressing those who have not completed primary or secondary education and those seeking new qualifications[9] The Law operates in conjunction with the Law on National Vocational Qualifications (Official Gazette of Montenegro, No 51/2025; previously Nos 80/2008, 14/2009, 80/2010, 18/2011, 40/2011, 40/2016, 56/2018) and the Law on the National Qualifications Framework (Official Gazette of Montenegro, Nos 80/2010 and 53/2025), which were updated at the same time to ensure that qualifications were recognised, aligned and flexible (e.g. through micro-qualifications), while also bringing the system into line with European standards by introducing new concepts and approaches such as key competences, recognition of non-formal, informal and lifelong learning. A significant number of rulebooks and methodologies have also been developed to further regulate the functioning of the Adult Learning System.

Source: adapted from ETF, 2026e

In the second group of countries, there are legal provisions for adult learning, but they are more fragmented or only partially aligned with strategic ambitions. Kosovo legally recognises formal, non-formal and informal learning and has integrated VNFIL into its NQF, yet the legislative emphasis remains largely on vocational pathways, with civic and community learning insufficiently addressed. Serbia, despite a coherent overarching strategic framework (SDES 2030), relies on a Law on Adult Education from 2020 that was scheduled for revision in 2023 but was postponed. Legal updates have progressed in related domains (NQFs, dual education), but the absence of a cohesive, modernised Adult Education Law constrains AL policy visibility and cross-sector coordination. Ukraine has multiple laws regulating adult learning across education sectors (general education, VET, higher education, professional development), but without a dedicated and unique law or unified legal framework policy direction remains dispersed. In Bosnia and Herzegovina, the 2014 Principles and Standards are a State-level normative framework adopted by the Council of Ministers, which aims to support policy harmonisation, coordination and sector development among the various entities. They function as a *de facto* reference framework across jurisdictions, but because entities and cantons legislate

[9] The 2025 update to the Law on Adult Education in Montenegro brings several important changes. It introduces micro-qualifications and new opportunities for self-directed learning, giving adults more flexible ways to build skills. Pilot programmes can now be implemented without formal licensing, though they will only issue certificates rather than diplomas. After completion of the pilot programme, the organiser of the pilot programme issues a certificate of attendance. Assessments of knowledge and skills will be carried out internally but the results will remain confidential. Adults pursuing their first qualification will be able to participate free of charge in publicly funded programmes, removing financial barriers to entry. One significant change introduced by the 2025 Law on Adult Education is that university teachers and academic staff are now permitted to work in adult education institutions without the obligation to pass the andragogical examination. The aim is to facilitate the engagement of higher education personnel in adult learning provision, expand the pool of qualified trainers and reduce administrative barriers for institutions

independently, implementation remains uneven. These examples show that, while adult learning is legally recognised everywhere, the degree of coherence, completeness and operational readiness varies significantly.

The alignment of legal frameworks and strategies is critical but cannot alone guarantee implementation readiness. Legal acts that need approval but are missing or still under development represent an obstacle to robust development of ALS and implementation of the approved policies in these countries. This particularly applies to the secondary legislation that is needed in most countries to define the intervention models, the institutions responsible and the processes and procedures, rather than just having the generic references or principles included in the primary legislation.

Box 3: Developments in the regulation of adult learning across Bosnia and Herzegovina

In the Federation of Bosnia and Herzegovina, in accordance with the constitutional arrangement and the applicable legislation, competences in the field of education, including adult education, are divided between the federal and cantonal levels of government. The federal level, through the competent ministry, has an expert coordinating role, particularly with regard to planning, policy alignment, the development of general standards and the provision of professional support in the field of education. Cantonal education authorities, within their constitutional and legal competences, play a key role in regulating, organising and financing adult education. This includes adopting regulations, approving and supervising adult education providers and planning and implementing programmes in line with the needs of local communities and labour markets. While this constitutional and institutional allocation of competences allows adult education policies to be tailored to the specificities of the cantonal context, in practice it has led to differences among cantons in the pace of adoption of secondary legislation, implementation timelines and the degree of operationalisation of certain measures.

Between 2009 and 2019, all administrative units of Bosnia and Herzegovina – including the ten cantons of the Federation of Bosnia and Herzegovina, Republika Srpska and Brčko District – adopted or amended laws regulating adult learning, establishing a comprehensive legal basis for formal, non-formal, and informal learning. Since 2019, some education authorities have embarked on a process of amending existing laws or adopting new legislation. The legal frameworks share common objectives: improving employability, social inclusion and lifelong learning opportunities through quality assurance, institutional regulation, and labour-market alignment. While the legal frameworks are now largely harmonised and aligned with EU and lifelong learning principles, challenges remain in full operationalisation, particularly where bylaws and enforcement mechanisms are still under development, such as in the Brčko District and some smaller cantons.

Source: adapted from ETF, 2026b

It is also common to find delays in or absence of secondary legislation, which, as mentioned, are critical for operationalising legal provisions – particularly those relating to programme verification, institutional accreditation, non-formal provision regulation and new offers or innovations in the system. North Macedonia, Montenegro and Moldova all illustrate this gap: their primary legislation is well aligned with national strategies, but – at the time of data collection (September 2025) – incomplete bylaws continue to slow down reforms in validation and accreditation systems. Similar issues appear in Kosovo and Serbia, where legislative provisions are in place but lack the derived regulatory instruments needed for full execution.

Finally, legal fragmentation can be horizontal or vertical, in both cases reducing the coherence of ALS. In Bosnia and Herzegovina, fragmentation is structurally embedded, due to their constitutional and administrative features, with divergent bylaws, uneven accreditation regimes and variable definitions of adult learning across Cantons and Entities. Kosovo, Serbia and Ukraine demonstrate horizontal fragmentation, with responsibilities divided across multiple ministries or agencies, leading to overlapping mandates and fragile regulatory elements, especially around non-formal education.

In countries with stronger frameworks, such as North Macedonia and Montenegro, ALS may be influenced by sectoral silos, with employment, education and social-inclusion measures depending on different administrations and failing to achieve the integrated approach that would serve learners' needs. Thus, fragmentation can manifest in different ways but the result is the same: it affects equity, country-wide applicability, and the ability to scale adult learning provision. Eventually, it underscores the building of lifelong learning, which should rely on whole-of-government approaches according to the principles of EU frameworks like the European Skills Agenda and the Union of Skills as critical to ALS transformation. Albania is a case where a stronger integration of adult learning is conceived at strategic and regulatory levels, as is presented subsequently.

4.4 Main policy priorities for adult learning in the EU enlargement area

The main objective of the analysis is to identify the policy areas that are common and the ones that are specific and linked to country context and the current stage of development of AL, but also the most important missing areas for them to become fully comprehensive systems. The level of alignment of EU policy priorities such as the ones envisaged in the Union of Skills and other policy documents and recommendations is also analysed.

The first common trend in adult learning policies across the countries under analysis is that they reveal a prioritisation of employability, skills development and alignment with labour market needs, although with varying degrees of strategic coherence and operational maturity for moving further with their implementation. Remedial education and specific initiatives for low-skilled adults are sometimes mentioned in the strategic

frameworks, as in the case of Moldova, but systematic implementation of relevant policy measures is lacking.

In several countries – Albania, Montenegro, Serbia, Kosovo and North Macedonia – adult learning is framed primarily as an instrument for strengthening human capital and workforce competitiveness, emphasising these strategic priorities as per the main EU policy documents. Policy agendas focus on digital skills, VET-related upskilling and reskilling, inclusion of vulnerable groups and improved pathways for adults seeking to enter or re-enter employment.

In Kosovo, policy orientations also reflect EU priorities by emphasising employability, digital competences, VNFIL and inclusion; Montenegro's policy vision further integrates adult learning into national reform strategies focusing on human capital development and transitions to green and digital economies. Likewise, Albania's policy architecture stands out for its integrated employment-skills-lifelong learning agenda, offering a cross-sectoral approach rarely found elsewhere in this group of countries.

Box 4: A unique policy framework for adult learning in Albania

A key strength of the Albanian system is its level of integration of skills development and employment policies, including adult learning policies at strategic, policy and legal levels.

Adult learning is a national priority and the government and its social partners actively promote its advancement through stronger coordination, upskilling, and inclusive learning pathways. Adult Learning priorities in Albania are embedded within the National Employment and Skills Strategy 2023–2030 (NESS 2030) and the Reform Agenda 2024–2027[10], focusing on improving employability, lifelong learning participation and the alignment of education with labour market needs.

The NESS 2030 in Albania is an integrated policy agenda that jointly covers education and training, employment, social inclusion and lifelong learning, including adult learning, within a single strategic framework. This cross-sectoral design, directly linked to EU commitments, is unique in the Western Balkans region, as it addresses these areas through a unified employment–skills–lifelong learning–social inclusion agenda. Albania has developed coherent legal and strategic frameworks, anchored in the VET Law (2017 amended in 2024) and the AQF Law (2018) and fully aligned with EU and national strategies addressing adult learning and LLL (i.e. the EU Growth Plan and the National Reform Agenda).

Source: adapted from ETF, 2026a

Despite this shared emphasis on employability and skills, adult learning policy approaches remain highly uneven in terms of coherence, strategic focus, and coverage of lifelong learning domains. Countries such as Bosnia and Herzegovina, Serbia, and Ukraine reflect

[10] This Agenda is linked to the EU Growth Plan for Albania

more fragmented policy settings where the responsibilities over this sub-sector are distributed across education, labour, VET, youth, and social inclusion sectors without a unifying national adult learning strategy.

In Bosnia and Herzegovina, decentralisation is both a strength and a constraint: while entities and cantons can adapt policies to local needs, this leads to uneven implementation, varied policy priorities, and inconsistent quality assurance standards. In Serbia, adult learning policy objectives are dispersed across broader education and employment strategies, limiting the visibility and operational steering of adult learning as a standalone policy area. Ukraine exhibits a highly dynamic but fragmented policy environment where adult learning is present in multiple strategies, often driven by recovery, reconstruction and donor initiatives, yet lacking an overarching national policy framework.

Across the countries analysed, adult learning policies tend to prioritise technical and structural reforms – such as programme accreditation, VNFIL expansion, modularisation of learning pathways, and digitalisation of administrative processes – yet the breadth of lifelong learning remains insufficiently addressed. Civic, social, cultural and third-age learning are rarely integrated into national policy agendas, resulting in adult learning systems that are only to a certain extent labour-market-driven (demand-driven), sometimes narrowly so. Another commonality is the gap between policies and their implementation.

Countries such as North Macedonia and Montenegro are progressing in formal system reforms (verification of programmes, VNFIL, accreditation of providers), but these remain procedural and have yet to catalyse large-scale expansion in participation. In Moldova, adult learning policies are well aligned with national strategies but constrained by inadequate instruments for implementation and by the absence of clear mechanisms to expand non-formal learning opportunities. Albania and Kosovo, despite robust strategic commitments, face significant challenges in turning ambitious adult learning policies into sustained, inclusive and diversified learning pathways, due to their early stages of implementation of such reforms.

Another cross-cutting policy trend concerns the role of donors, who frequently act as the principal drivers of innovation and outreach in education and training systems in these countries, including for adult learning. In Bosnia and Herzegovina, donor-funded initiatives (e.g. DVV International, EU4VET) balance the institutional fragmentation of adult learning policy somehow, while in Ukraine they are essential to maintaining adult learning provision during a period of national crisis. Kosovo, Montenegro and Serbia also rely heavily on donor support for specific upskilling programmes, career guidance initiatives and validation pilots.

The participation of employers, social partners and non-state actors in AL policy design and implementation often remains sporadic and insufficiently institutionalised. This weakens policy responsiveness to labour market needs, especially in contexts facing intense demographic pressures, skills shortages, and high rates of inactivity. Enhanced

policy coordination with employers, municipalities and civil society remains a key unmet need across much of the region.

Overall, while adult learning policy priorities across the EU enlargement area increasingly mirror EU agendas – with shared emphasis on employability, inclusion, digital and green skills – the challenge lies in embracing a more comprehensive concept of adult learning, with coherent policy, cross-sector integration and effective operationalisation with wider stakeholder participation and less dependence on donors' coordination and leadership in innovative areas.

Many countries demonstrate strong intent, visible legal recognition and emerging institutional frameworks, yet policies are still predominantly concentrated in VET-oriented or compensatory domains, with insufficient differentiation across regional contexts and population groups. Adult learning policy priorities are mostly based on the current development status of the adult learning system in each country.

The summary table below offers a cross-country analysis and comparative overview of these eight countries in terms of the main strengths, challenges and current state of play in adult learning.

Table 3. Strengths, challenges and state of play regarding strategic, legal and policy frameworks for adult learning in the EU enlargement area[11]

Country	Strengths	Challenges	State of play
Albania	▪ Comprehensive modernised AL legal framework integrated with VET/ AQF and the NESS agenda ▪ High policy integration; new QA/ VNFIL instruments ▪ Few accredited providers ▪ Targets exist but unmet	▪ <2 % participation (2025) ▪ Weak monitoring ▪ Foundational skill under-achievement ▪ STEM/ICT gaps	▪ Legal framework **fully aligned** with EU and national strategies addressing AL and LLL (i.e. the EU Growth Plan and the National Reform Agenda). ▪ AL policies are **not very fragmented**: policy design lies with two ministries (MoEI and MoES) and their subordinate institutions (NAVETQ, NAES, AQAPE), which are the main entities responsible for education, skills, and employment sectors. ▪ Benchmarking indicators and other national targets/relevant EU policy targets **match** the EU policy targets and benchmarking indicators, though their achievement is considerably below the defined targets.

[11] The robustness of country-level assessments varies depending on the strength of the underlying evidence available for each analytical dimension.

Country	Strengths	Challenges	State of play
Bosnia and Herzegovina	▪ Partial alignment of AL legal framework (principles & standards) with strategies ▪ Progress areas: digitalisation and VNFIL ▪ Priorities: governance, QA, VNFIL, financing ▪ Adult learning remains a secondary policy priority in the overall education system reform	▪ Low participation ▪ Uneven by-laws across the country ▪ No unified state-level AL strategy	▪ The adult learning legal framework is **partially aligned** with policy objectives and strategies. Republika Srpska has established a comprehensive system that has adopted bylaws and registers, while the Federation of Bosnia and Herzegovina remains fragmented due to inconsistent adoption of secondary legislation across cantons. ▪ Adult learning policies **remain fragmented** and predominantly focused on programme accreditation, provider licensing and initial steps toward VNFIL operationalisation. Broader systemic reforms – particularly those relating to quality assurance and financing – remain underdeveloped. ▪ Benchmarking indicators and national targets only **partially match** relevant EU policy frameworks, including the European Agenda for Adult Learning (EAAL) 2030 and the Union of Skills targets. Alignment is mostly conceptual, with limited operational mechanisms for data collection and monitoring.
Kosovo	▪ Legal framework incl. VNFIL ▪ VNFIL linked to NQF ▪ Monitoring covers participation/digital skills ▪ Priorities: employability, digital skills, inclusion	▪ Low participation ▪ Partial legal alignment ▪ No standalone AL strategy ▪ Donor-dependent funding	▪ Legal framework is **partially aligned** with national strategies ▪ Adult learning policies **are fragmented** ▪ Benchmarking indicators and other national targets **only partially match** relevant EU policy targets and benchmarking indicators

Country	Strengths	Challenges	State of play
Moldova	▪ Strong legal/strategic base for AL ▪ Reform Agenda linked to EU priorities	▪ Secondary legislation missing ▪ Implementation lag; non-formal QA/accreditation pending ▪ Partial availability of data: CVET only; limited comparability	▪ Strategy and legal framework are **fully aligned**. The national strategies and legislation show that adult learning is a recognised priority, with clear objectives: expanding LLL, facilitating flexible retraining and upskilling and enabling inclusion. ▪ Adult learning policy remains **fragmented**, while formal adult learning, especially in CVET, is regulated. Non-formal and informal education are not yet systematically supported or regulated, especially at local level. ▪ Because data are **partial and limited**, it is not currently feasible to compare Moldova's adult learning performance with EU benchmarks.
Montenegro	▪ AL strategic/policy framework aligned with EU ▪ 2025 modernisation: micro-qualifications, flexible pathways	▪ Low participation (5.47%/2024) ▪ Weak data systems; no national targets ▪ Limited comparability of benchmarking indicators	▪ The adult learning legal framework **is largely aligned (partially to fully aligned)** with national policy objectives and strategies, although the adoption of some secondary legislation is still pending for full implementation. ▪ The strategic framework is **partially aligned** with regional and local labour market needs, as policy planning remains centralised and does not fully account for local specificities. ▪ Benchmarking indicators and other national targets only **partially match** relevant EU policy targets and benchmarking indicators

Country	Strengths	Challenges	State of play
North Macedonia	▪ Strategic and legal alignment; two strategies + action plans + legislation ▪ Digital verification system of programmes ▪ Focus on verification/ accreditation of programmes, plus VNFIL	▪ Low participation ▪ Delayed secondary legislation; VNFIL pending, with legal framework aligned but incomplete ▪ Weak employer demand for adult learning certification ▪ Low investment	▪ The adult learning legal framework is **fully aligned** with national policy objectives and strategies, though not completed by the adoption of secondary legislation. ▪ State investment in adult learning remains below the indicators set in national strategies and regarding the EU targets is **fragmented,** just like adult learning governance and adult learning implementation. ▪ Benchmarking indicators and other national targets only **partially match** relevant EU policy targets and benchmarking indicators. The country has not set national targets and monitoring mechanisms relating to employment outcomes.
Serbia	▪ Coherent legal/ strategic framework via SDES 2030/ APAE, aligned with EU Skills Agenda. ▪ Strong focus on inclusion	▪ Low participation ▪ Partial legal framework: revision of AL law pending; partial legal updates ▪ Limited intersectoral coordination ▪ Monitoring of APAE (Action Plan for Adult Education)/ RoAPAE (Report on Action Plan for Adult Education) tracks activities not outcomes	▪ The **legal framework is broadly aligned** with policy objectives. However, its revision remains incomplete. The quality assurance system, based on initial accreditation and evaluation of institutional performance, is in place and is continuously being improved. ▪ Adult learning policies are **partially fragmented**, dispersed across education, labour and youth domains. Coordination between national, regional and local levels is limited and participation of non-state actors and social partners in planning and implementation remains weak. ▪ Strategies aligned with EU policy frameworks are advanced (NEAAL 2030, Union of Skills) but only match **partially**

Country	Strengths	Challenges	State of play
Ukraine	▪ Adult learning anchors in key overarching strategies for education ▪ AL legal framework is fragmented ▪ AL partially prioritised; strong local pilots ▪ Focus: SES vouchers; micro/ short courses; VNFIL	▪ Low participation ▪ Fragmented legal base. A draft Law on Adult Education was considered at the time this report was written (2026) ▪ No dedicated adult learning strategy; ▪ QA excludes non-formal AL ▪ No EU-aligned targets ▪ Monitoring descriptive ▪ Donor-dependent for financing	▪ Adult learning in the national and regional strategies is partially prioritised. In open resources and public discourse, adult learning is highlighted as a priority and is actively supported by government initiatives and many donor projects, but it **still lacks a unified legal framework**. Legal framework is **partially aligned** with national and regional strategies. ▪ Adult learning policy framework is **fragmented** within the wider education and training system of the country ▪ National indicators and targets are weak/descriptive. Ukraine does not currently define national quantitative targets for adult learning, including internationally comparable participation indicators (SDG 4.3.1). Benchmarking indicators and other national targets **do not match** relevant EU policy targets and benchmarking indicators

Source: authors, based on country factsheets

5. ADULT LEARNING INSTITUTIONAL ARRANGEMENTS AND GOVERNANCE MECHANISMS

5.1 Institutional arrangements and governance models

This section focuses on presenting the cross-country analysis on the current AL governance models existing in the EU enlargement area, as well as making a map of the various public and private stakeholders involved in AL provision. It investigates whether the system is operating in a more or less centralised model or in a more integrated manner within their National Qualification System or more outside, and which institutions support the functioning of each model. It is also important to understand whether and how state organisations collaborate with private sector operators. A mapping of key-stakeholders will be presented in the form of clusters of countries according to its governance model, if the country information allows this to be done.

Findings from the country factsheets show that:

- Governance is fragmented across ministries/levels in many countries, but where sectoral or interministerial councils or coordination platforms have clear mandates, policy delivery improves.
- While strategic steering often remains centralised, effective implementation of adult learning policies depends to a large extent on municipal and local-level ownership, particularly for outreach, guidance and coordination with local providers and employers.
- Financing is dominated by sectoral budgets (education/employment), donor programmes and household/company spending, while dedicated cost-sharing instruments remain rare or in the pilot-stage.
- Quality assurance mechanisms and monitoring procedures are stronger in formal adult learning provision, whereas non-formal provision and outcomes tracking remain partial.
- VNFIL is operational in only a few countries and developing in others, showing the impediments to implementation, despite how validation is indicated as a crucial instrument to boost AL in the policy documents of the surveyed countries.

Table 4. Institutional arrangements, stakeholder involvement and funding sources

Country	Coordination (see list of acronyms and abbreviations)	Stakeholder involvement	Main funding sources
Albania	MoECI/NAVETQ/NAES/Sectoral Skills Committees	Medium	State budget + Donor support
Bosnia and Herzegovina	Multi-level (Entities/Cantons)	Medium-low	Donor support (project-based)
Kosovo	MESTI/NQA/EARK	Medium-high	State budget (limited grants)
Moldova	MECR/NQF directorate	Medium	State budget + potential local sources
Montenegro	MoE + CoVEs	Medium	State budget
North Macedonia	MoE/CEA/Adult Education Council	High	State budget + Donor support (EU initiatives)
Serbia	MoE + Vocational and adult education council + SORS	Medium	State budget + Employer contributions
Ukraine	Task force + partners	High	State budget + Donor support (Team Europe/EU)

Source: authors, based on country factsheets

In a more detailed view, within the EU enlargement area, institutional arrangements for adult learning show a widespread tendency toward centralised governance with partial decentralisation in implementation, though the balance varies significantly by country. Albania, Montenegro, North Macedonia and Serbia operate strongly centralised systems in which ministries and specialised agencies retain strategic, regulatory and supervisory authority, while providers execute programmes with varying degrees of autonomy. By contrast, Bosnia and Herzegovina, and to some extent Kosovo and Ukraine, exhibit fragmented, multi-level arrangements, where mandates are spread across entities, cantons or parallel ministries according to their constitutional and administrative features. These models permit contextual adaptation but create structural challenges for system coherence, steering and uniform policy implementation. Moldova also maintains a centralised policy and regulatory model through the ministry in charge of education affairs, although delivery is more decentralised.

Box 5: Centralised governance with decentralised delivery in Moldova

The Ministry of Education and Research sets the regulatory and strategic framework for adult learning in Moldova. The Education Strategy 2030 does not establish or reference a dedicated coordinating body for adult learning and no such mechanism is mentioned in the governance or implementation sections, indicating that coordination is carried out through existing ministerial structures rather than a specialised entity. Cross-ministerial collaboration plays an important role in the implementation of adult learning policies. MER works with the Ministry of Labour and Social Protection (MLSP), the Ministry of Economic Development and Digitalization of the Republic of Moldova (MEDD) and other relevant ministries to ensure that adult learning programmes are aligned with national development goals and labour market needs.

The implementation of adult learning in Moldova relies on multi-stakeholder collaboration. At local level, responsibility for implementation lies with local public authorities, which may collaborate with local NGOs, social partners and community-based organisations to expend access by adult learners and deliver adult learning opportunities tailored to local contexts. This cooperation typically involves joint community outreach, sharing existing facilities (such as libraries, cultural centres, or NGO learning spaces) and coordinating local initiatives tailored to community needs, rather than formal procurement arrangements. Since legislative and regulatory mechanisms for local authorities to support non-formal adult learning remain limited, their contribution is largely aimed at facilitating access, hosting activities and partnering with civil society actors to deliver programmes close to learners' places of residence.

Source: adapted from ETF, 2026d

Stakeholder participation is moderately developed across the EU enlargement area, but in most cases remains stronger nationally than locally. Albania, Montenegro, North Macedonia and Serbia have formalised multi-stakeholder councils or advisory bodies; however, civil-society engagement remains uneven in practice, particularly at regional and provider level. Bosnia and Herzegovina's highly decentralised architecture results in widely divergent degrees of participation, with Republika Srpska demonstrating stronger institutionalisation compared to the canton-level variability of the Federation of Bosnia and Herzegovina (FBiH). Kosovo and Ukraine involve a broad spectrum of stakeholders but advisory roles tend to be non-systematic and implementation influence is limited. Across all countries, the governance of non-formal providers and NGOs remains weaker than for formal VET institutions, with gaps in representation, coordination and voice. Participation of companies (given their size) or even micro, small and medium enterprises (MSMEs) remains rather limited and off the radar of the monitoring procedures carried out by public institutions in the eight countries under analysis.

Taken together, the governance models demonstrate increasing formal clarity of institutional roles, yet they continue to face challenges of overlapping mandates, limited coordination mechanisms and uneven implementation capacities. While some countries benefit from strong central agencies (e.g. Albania's NAVETQ, NAES, and AQAPE, Serbia's NQFS Office, Montenegro's CVE), others rely more heavily on donor-driven initiatives or informal cooperation structures to compensate for institutional gaps. The overall pattern reveals systems in transition: formal governance frameworks are strengthening, but operational governance – especially interinstitutional coordination and decentralised engagement – lags behind.

5.2 Financing of adult learning

Financing models for adult learning are characterised by mixed sources, combining state budgets, donor support, employer contributions and learner fees. However, in most countries, funding remains fragmented, unstable and insufficient, particularly for non-formal and community-based adult learning. Across most countries, non-formal training providers – particularly NGOs – face significant financial barriers due to the absence of public–private funding mechanisms, levy schemes, tax incentives or training funds common in EU models.

Albania, Serbia and North Macedonia have some degree of predictable public funding for adult learning-related programmes, although this remains well below the level needed to scale provision or address structural system needs. Montenegro, Kosovo, Moldova and Ukraine highlight the limitations of models that rely heavily on project-based or fee-based funding, especially for non-formal adult learning and capacity development, with limited national commitment through dedicated budget lines or sustainable mechanisms. Meanwhile, Montenegro has, for the first time ever, defined a dedicated budget line for adult learning in 2026.

Divergence is greatest in Bosnia and Herzegovina, where financing reflects the broader decentralised governance structure: Republika Srspska has comparatively stable budget allocations while the cantons of the Federation of Bosnia and Herzegovina and the Brčko District depend heavily on project financing, creating uneven provision and unpredictable system development.

Table 5. Overview of financing of adult learning systems in the EU enlargement area

Country	Strengths	Challenges	State of Play
Albania	▪ Mixed sources: State budget, EU/donor, municipalities.	▪ Fragmented mechanisms; ▪ Donor dependence; ▪ Underfunded VET/AL.	▪ Moderately adequate[12] but limited funding; ▪ Multisource but centralised model; ▪ Limited private contributions.
Bosnia and Herzegovina	▪ Mixed sources: PES, employers, donors; ▪ RS (only) has regular budget lines.	▪ Cantons mostly without dedicated adult learning lines; ▪ Project based.	▪ RS stable, FBiH/BD mixed models for funding with scarce financial resources allocated; ▪ Highly decentralised and inconsistent.
Kosovo	▪ Public coverage for compensatory adult education; ▪ Strong donor investment.	▪ No adult learning budget line; ▪ Donor dependence; ▪ Very low KESP allocations.	▪ Inadequate coverage; ▪ Fragmented and project dependent.
Moldova	▪ Mixed sources: State, fees, associations, donors; municipalities.	▪ Adult learning not a separate budget item; ▪ Donor dependence; ▪ No systemic employer incentives.	▪ Moderately adequate but unstable, low coverage of rural areas; ▪ Fragmented and project dependent.
Montenegro	▪ Mixed sources: State, municipalities, employers, donors, learners' contributions.	▪ Specific adult learning budget line (since 2026); ▪ Fragmented and insufficient; ▪ Weak reporting.	▪ Overall inadequate; no training funds/incentives; ▪ Fragmented and insufficient.
North Macedonia	▪ Some obligatory State funding provisions ensure predictability.	▪ No consolidated financing picture; ▪ Legal flexibility undermines stability.	▪ Partially adequate; needs systemic financial tracking; ▪ Centralised and partially consolidated over the course of many years but limited for new initiatives.

[12] In this context 'adequate' indicates that AL financing is planned according to needs (coverage), is predictable (regularity) and there is some form of monitoring of budget implementation (accountability).

Country	Strengths	Challenges	State of Play
Serbia	▪ Mixed sources: State, municipalities employer, donor	▪ Fragmented data across ministries; ▪ Weak horizontal coordination.	▪ Moderately adequate; financial information is not harmonised; ▪ Fragmented and limited coordination.
Ukraine	▪ PPP via donor projects; ▪ Moderate adequacy for formal adult learning.	▪ Donor dependence; ▪ Municipalities lack incentives to invest.	▪ Moderately adequate for formal learning offers; ▪ Fragmented and project dependent.

Source: authors, based on country factsheets

Overall, financing arrangements across the region can be best described as moderately adequate for maintaining core formal VET/ALS, but largely inadequate for expanding adult participation, strengthening equity, or systematically supporting quality improvement. Without more stable funding streams and coordinated financial planning, in particular multi-annual budgeting and incentives for employer investments, adult learning systems will continue to depend on external projects and remain vulnerable to discontinuity and uneven territorial coverage.

5.3 Quality assurance in adult learning

In this section, the focus is on quality assurance mechanisms, whether specific to ALS or integrated at system level for education and training offers overall. These cover areas such as accreditation of programmes and providers, data collection and monitoring, and self-evaluation mechanisms.

Table 6. Quality assurance mechanisms for adult learning in the EU enlargement area

Country	Strengths (see list of acronyms and abbreviations)	Challenges	State of play
Albania	▪ NAVETQ/AQAPE lead QA; ESG-aligned accreditation/ monitoring; clear responsibilities.	▪ QA weaker in non-formal; uneven regional oversight.	▪ QA established but partial for non-formal adult learning; ▪ VNFIL improving.
Bosnia and Herzegovina	▪ QA by ministries/APOSO/ pedagogical institutes; ▪ ISKOOM emerging for digital monitoring in Tuzla Canton	▪ No harmonised QA across entities; ▪ Non formal often outside QA; ▪ CPD sporadic.	▪ Mixed QA implementation capability; Republika Srpska strongest; ▪ VNFIL at pilot stage.
Kosovo	▪ NQA accredits providers & validates qualifications; ▪ Trained VNFIL practitioners.	▪ Limited QA for NGO/ private adult learning; ▪ Fragmented monitoring; ▪ Slow VNFIL uptake.	▪ QA partial: formal covered, non-formal weak; ▪ NQF linkage increasing.
Moldova	▪ ANACEC strong in formal VET QA; ▪ Standards aligned to EU.	▪ QA missing for non-formal; ▪ Limited data/monitoring; ▪ Few CPD opportunities; ▪ Weak VNFIL.	▪ QA robust for formal; insufficient for non-formal; ▪ Monitoring limited.
Montenegro	▪ Licensing + CVE monitoring; ▪ Wide andragogical training.	▪ Enforcement inconsistent; ▪ Capacity limitations; MEIS underused; ▪ PD underfunded.	▪ QA partial; gaps in resources and follow up.
North Macedonia	▪ Legal framework assigns QA roles.	▪ Limited QA capacity (MoES/AEC); need more VNFIL capacity-building.	▪ QA partial; ▪ Limited staff/resources; ▪ Strong NQF linkage.
Serbia	▪ Accreditation, external and self-evaluation; ▪ NQF register consolidates non formal data.	▪ QA uneven between formal/non formal.	▪ QA well developed; stronger in non-formal adult learning.
Ukraine	▪ Broad QA architecture (NAQA, SSEQ, NQA/QCs); ▪ Provider self-assessment.	▪ No unified QA standards/indicators and fragmented mechanisms.	▪ QA partial: formal strong, non-formal demand driven.

Source: authors, based on country factsheets

Quality assurance systems work at two speeds in these countries: while there is substantial progress for formal adult learning, often aligned with European standards and guidelines, significant weaknesses characterise the regulation and oversight of non-formal adult learning provision and providers.

Albania, Montenegro, Serbia and Moldova have well-defined QA bodies (e.g. NAVETQ+AQAPE, CVE, ANACEC, NQF Offices) and require institutional accreditation, programme verification and periodic external evaluation. These systems form a solid basis for consistency and transparency, even if human resource and capacity limitations remain. Ukraine's architecture is similarly well-developed for formal adult learning, with NAQA, SSEQ and NQA/QCs providing coverage for higher, secondary and professional qualifications.

Box 6: A well-defined quality assurance mechanism for adult learning in Serbia

Monitoring and evaluation activities are integrated at multiple levels, including accreditation, external and self-evaluation of providers, and are supported by donor and EU-funded projects. Monitoring of formal adult learning is integrated within the Education Management Information System (EMIS), a national digital system launched in 2022 that consolidates data from several registers, including registers of learners, education institutions, higher education institutions, education programmes and accredited study programmes (MoSTD, 2019). Within EMIS, QA maintains the NQFS Register and its sub-registers, including the PROAE sub-register, which contains system-level data on PROAE status, accredited adult learning programmes and employers providing practical training. EMIS datasets are used primarily for system management, planning and quality assurance. Personal data are not public, while selected institution-level indicators (e.g. on school infrastructure, staff, enrolments and programmes) are available through the Ministry's Open Data portal, which ensures public access to selected statistics. The 2024 RoAPAE report notes that system-level data on non-formal adult learning, VNFIL and CGC are consolidated through the NQFS Register and PROAE sub-register, while the system still lacks data on formal adult education, which are dispersed across school statistics.

Coordination mechanisms are in place and stakeholder engagement in quality assurance, feedback processes and impact assessment is gradually developing. PROAE accreditation and VNFIL procedures follow defined frameworks, with limited flexibility. Overall, the adult learning quality assurance system has been established and is functioning.

Source: adapted from ETF, 2026g

In contrast, QA for non-formal and community-based adult learning is consistently underdeveloped across all countries. Kosovo, Bosnia and Herzegovina, Moldova and Ukraine highlight gaps in monitoring non-formal providers, an absence of unified QA frameworks and irregular CPD provision for adult educators and VNFIL assessors. In Bosnia and Herzegovina, reforms remain fragmented across entities/cantons, with non-formal providers often operating outside recognised QA systems. In Moldova and Kosovo, VNFIL systems exist legally but operationalisation is limited and the quality of provision varies widely. Montenegro and North Macedonia have clearer roles for QA authorities but lack sufficient staffing to carry out systematic monitoring.

Across the region, the shared trajectory is one of partial QA coverage, where formal VET has robust mechanisms, yet non-formal learning – central to adult participation, reskilling and inclusion – remains weakly regulated, inconsistently monitored and poorly supported. Strengthening cross-sectoral QA mechanisms, professionalising trainers/assessors and integrating non-formal provision into national QA systems all emerge as critical challenges to achieving a coherent and comparable adult learning landscape across the EU enlargement area.

A summary table aggregating information on the eight countries is presented (Table 6) as an overview of the institutional arrangements, governance models, funding sources and resources allocated to adult learning, as well as the quality assurance mechanisms in place.

Table 7. Strengths, challenges and state of play on institutional arrangements, governance models and financing, and quality assurance for adult learning in the EU enlargement area[13]

Country	Strengths	Challenges	State of play
Albania	▪ Clear institutional framework: MEI, MoES and agencies (NAVETQ, NAES, AQAPE); ▪ Multi-stakeholder governance: National VET Council, National Labour Council, Sector Skills Councils; ▪ Growing collaboration with private providers/sectoral committees; ▪ AQF supports alignment to European standards and guidelines, and cross-border recognition; ▪ Accreditation/monitoring roles clearly delineated (self-assessment, external review).	▪ Limited vertical coordination and weak integration of local actors/ CSOs and data systems (especially for non-formal); ▪ Fragmented funding; donor dependency; underfunded public VET/AL; ▪ Employer/CSO engagement inconsistent regionally/locally; ▪ Capacity gaps in CPD and VNFIL practitioner support.	▪ Institutions do coordinate. Albania has a **centralised governance system** for VET and adult learning led by MEI, NAES and NAVETQ/ NAES/AQAPE, supported by advisory councils and national strategies that ensure vertical consistency across legislation. **Implementation is decentralised**, based on autonomy and responsibilities at regional or provider level; ▪ Financing model: **moderately adequate** in terms of sources but limited in volume. Mixed funding comes primarily from the state budget, complemented by donor/EU funds, municipal contributions and limited private-sector support; public-private partnerships exist but remain project-based; ▪ Stakeholder diversity is **moderate** and stronger centrally than at local level. Stakeholder participation includes government bodies, employers, trade unions, civil society and learners; ▪ AQF and VNFIL reforms are progressing. Recognition and portability of adult learning qualifications are **integrated to a certain extent** through the AQF, with ongoing operationalisation and reforms regarding recognition of prior learning; ▪ QA established nationally/at provider level; weaker coverage in non-formal adult learning. QA mechanisms are established nationally (NAVETQ, AQAPE) and at provider level through accreditation, self-assessment and monitoring of formal and non-formal programmes; trainer quality is supported by CPD and certification, but capacity-building delivery is only **covered to a certain extent**.

[13] The robustness of country-level assessments varies depending on the strength of the underlying evidence available for each analytical dimension.

Country	Strengths	Challenges	State of play
Bosnia and Herzegovina	▪ Legal assignment of responsibilities in a decentralised system; MoCA, APOSO, Labour Agency roles; ▪ RS has a strong Institute for Adult Education; ▪ Multiple funding sources: public/PES/employer/ learner/EU donor; ▪ Employers/NGOs engaged; EU4VET, DVV, ETF pilots; adult learning Councils in some canton; ▪ BiHQF as emerging reference; APOSO aligns standards; RS validation linked to occupational standards; ▪ QA mandates shared (ministries, pedagogical institutes, APOSO); digital monitoring emerging (e.g. ISKOOM).	▪ Fragmented governance; no single state-level coordinating body; limited executive powers at state level; ▪ Highly project-based funding; lack of dedicated budget lines; no levies/tax incentives; weak reportin; ▪ Stakeholder engagement uneven; cooperation largely donor driven; ▪ Major inter-entity/ inter-canton disparities, limited standardisation; ▪ VNFIL largely examination based; low trust in non-formal; ▪ QA frameworks inconsistent across entities/ cantons; CPD for trainers/ VNFIL staff not systematic.	▪ Alongside MoCA and APOSO as coordinating and advisory bodies, a broad range of institutions participate in policy design and implementation, including the RS Ministry of Education and Culture with its Institute for Adult Education, 10 cantonal ministries in FBiH and the BD Department of Education. Their roles are defined by law, but implementation and coordination remain **fragmented** and mostly donor driven; ▪ Financing of adult education in Bosnia and Herzegovina is **highly decentralised and fragmented**, with a significant reliance on project-based funding sources. In Republika Srpska, dedicated budget lines for this area exist, while in the cantons of the Federation of Bosnia and Herzegovina and in the Brčko District, BiH financing is provided through a combination of different budgetary sources and international projects, including active labour-market policy measures; ▪ There is a **moderate diversity** of stakeholders, including employers, chambers, PES, NGOs, and donors. However, **participation is not yet institutionalised**; social partners and learner representation remain limited and cooperation largely project based; ▪ The management of adult learning policies is **highly decentralised**, reflecting BiH's administrative structure. RS applies a more coherent and centralised model, while in FBiH, adult education falls fully within the competence of cantonal ministries of education, which regulate this field independently through their own laws, secondary legislation and strategic documents; ▪ The VNFIL is formally linked to the Bosnia and Herzegovina Qualifications Framework (BiHQF) but there is **no comprehensive and fully operational VNFIL system**; ▪ Quality assurance mechanisms are **only partially covered**. Supervision and monitoring exist through pedagogical institutes and inspectorates, but there is no harmonised system or uniform indicators. Continuous professional development (CPD) for adult learning practitioners and assessors' remains sporadic and externally funded.

Country	Strengths	Challenges	State of play
Kosovo	▪ NQF covers all learning/ qualification types; free access for vulnerable groups (compensatory, VTCs; ▪ Emerging coordination platforms; ▪ Capacity-building: >200 VNFIL practitioners trained by NQA.	▪ Overlapping/ unclear legal responsibilities; blurred accountability; ▪ Inactive governance bodies (SEC); AVETAE/AERK/ VTCs without advisory boards; ▪ Weak stakeholder advisory role; under representation of NGOs; ▪ Slow VNFIL uptake (3 accredited providers; ▪ No dedicated adult learning budget line; donor/fee dependence; very low KESP allocations; ▪ Fragmented monitoring; weak professional standards for trainers/ facilitators.	▪ Institutional coordination unclear or inactive. Despite legal decentralisation, governance remains **partly centralised** (strong MESTI role). Although adult learning in RKS is legally decentralised, governance remains **partly centralised**, concentrated at the central level, with MESTI retaining strong policy and implementation functions; ▪ The financing of adult learning is **not adequate**. There is no separate budget line for adult learning, and public resources mainly cover compensatory education and VTC training. Provision is heavily dependent on donor-funded projects and learner fees, leaving the system fragmented and unsustainable, with very low allocations under the KESP framework; ▪ Stakeholder participation **somewhat diverse but limited in practice**; NGOs not formally included. Other institutions contribute to quality assurance and implementation, but their roles are less prominent. Social partners participate primarily in policy design, while NGOs and donors are engaged through consultative or project-based mechanisms, indicating that decentralisation is not yet fully reflected in practice; ▪ Monitoring and quality assurance are **covered to a certain extent**. NQA validates qualifications and accredits providers, while AVETAE, EARK and the Education Inspectorate have oversight roles. However, the focus remains largely on formal public provision, with gaps in monitoring non–formal, NGO and private sector programmes and in ensuring professional standards for adult learning teachers/trainers/ facilitators; ▪ Adult learning outcomes and qualifications are linked to the NQF through NQA mechanisms, including validation and approval of qualifications, provider accreditation and implementation of VNFIL. Meanwhile, **the integration is to a certain extent** due to the slow uptake or VNFIL, however it is expected to improve with the development and implementation of the VNFIL outreach strategy.

Country	Strengths	Challenges	State of play
Moldova	▪ Clear leadership of MER in policy/regulation/ curricula; ANACEC ensures standards; ▪ Interministerial collaboration (MER–MLSP–MEDD); ▪ Active local authorities/ CSOs; employer engagement (CCI, trade unions, firms).	▪ Centralised decision-making limits provider/ local flexibility; ▪ QA/monitoring constraints (audit focused culture); limited staffing for LLL; ▪ Adult learning not a separate budget item; donor reliance undermines sustainabilit; ▪ Weak data, few CPD opportunities; weak recognition of non-formal/ informal, rural inequities, limited employer recognition of adult learning outcomes.	▪ Adult learning is **centrally governed by** MER, which oversees legislation, approves providers, and integrates adult learning within national strategies. **Implementation is decentralised**: local authorities, civil -society organisations and private training providers are responsible for delivering adult learning and training programmes. The national quality-assurance body ANACEC ensures external evaluation and accreditation of formal and continuing education institutions and courses; ▪ There is no dedicated national body formally mandated to coordinate adult learning. Coordination relies on informal cooperation within MER structures and between stakeholders, and expert assessments point to the absence of a consolidated intersectoral framework. As a result, **governance remains insufficiently institutionalised and coordination mechanisms are weak**. However, efforts towards greater coordination are ongoing; ▪ Financing of adult learning comes from a mix of sources: state budget allocations, individual and employer fees, contributions from professional associations, donations, sponsorships, and external project funding. While public funding exists (especially for priority groups like unemployed individuals, persons with disabilities, civil servants), much of adult learning remains dependent on project-based or fee-based financing. There is no evidence of a systemic public–private funding mechanism such as levy-based training funds, tax incentives for employers or employer-based compulsory contributions for adult learning at nationwide scale. As a result, the funding model can be judged as **only moderately adequate**, given the limited reach and sustainability; ▪ Stakeholder participation is somewhat diverse, but not sufficiently broad or systematic. It includes local public authorities, civil-society organisations, private training providers, and some employer associations, but **participation remains limited**, especially by private-sector employers and trade unions. VNFIL regulation is in place but integration with Moldova's NQF is not complete; ▪ Quality assurance for formal and continuing VET provision is overseen by ANACEC, which applies standards aligned with European and international practices. However, non-formal and informal adult learning is only loosely regulated, with no unified accreditation system or consistent oversight, leaving many providers outside quality-assurance mechanisms. Monitoring and data collection are also limited, particularly regarding participation, learning outcomes, regional equity and inclusion. Overall, **monitoring and quality assurance are only partially covered**, well-developed for formal VET programmes but **insufficient for non-formal and informal adult learning**.

Country	Strengths	Challenges	State of play
Montenegro	▪ Roles/responsibilities defined by law; participatory representation; ▪ Strong QA system: licensing (five-year), continuous vocational education monitoring, record-keeping/ transparency; ▪ Structured andragogical training (six modules; 926 practitioners); ▪ Multiple funding streams (state/local/learners/EA/ companies/donors).	▪ Highly centralised; limited municipal role; ▪ Funding/ coordination gaps; 2015–2025 Strategy under implemented; ▪ Civil society formally included but influence limited; ▪ Recently introduced adult learning budget line; fragmented/ insufficient funding; weak reporting; co-payment deters participation; ▪ Underutilised roles; uneven educator quality; capacity deficits; ▪ QA enforcement inconsistent; MEIS underused; limited human capacities (MESI/ CVE).	▪ Broad institutional participation with defined legal roles. There is **a moderate diversity** of stakeholders with clearly defined legal responsibilities, yet practical implementation is hindered by overlapping mandates, insufficient coordination and limited human and institutional capacities dedicated to adult learning. The system is centralised with a limited municipal role; ▪ The existing financing model for adult learning is **not adequate at all**, characterised by fragmented funding sources, and insufficient reporting mechanisms. Public investment remains limited, while municipalities and employers contribute marginally; there are no established financial incentives or training funds; ▪ Adult learning outcomes and qualifications are **fully integrated and linked** to NQF and the Law on National Vocational Qualifications, ensuring consistency, recognition and portability; ▪ Monitoring and quality assurance mechanisms are **partially covered**, with clearly defined institutional roles but limited resources, irregular data collection and ad hoc professional development of trainers due to the absence of sustainable funding.

Country	Strengths	Challenges	State of play
North Macedonia	▪ Clear distribution of responsibilities; advisory bodies active; ▪ Improved CPD for adult learning teaching staff (institutional/donor support).	▪ Underutilised institutional mandates (e.g. RVETCs); some dysfunction in processes; ▪ Dialogue for multi-annual financial planning not proactive/ systematic enough; ▪ Limited QA/ monitoring capacities (MoES/AEC understaffed); ▪ VNFIL practitioners' capacity-building needs; ▪ Flexible legal funding risks under financing; ▪ Lack of systemic financial data collection.	▪ **Roles are clear with underutilisation of governance capacity**. Governance of the system is **highly centralised**. Beside the MoES and the AEC as main policymakers, there is a broad range of institutions participating in adult learning policy design and implementation through their participation in various coordination bodies with different levels and types of roles – decision making, consultative and advisory – defined in the law **(high diversity)**; ▪ Current financing models are **partially adequate**: some provide for obligatory state funding, ensuring predictable budget allocations, while some statutory provisions do not. There is space to increase the utilisation of funding potential as per the law; ▪ The adult learning outcomes and qualifications are **fully integrated and linked** to the National Qualifications Framework; ▪ The monitoring and quality assurance aspects of adult learning are only **partially covered** with limited capacities and human resources allocated to these tasks in the institutions with such responsibility.

Country	Strengths	Challenges	State of play
Serbia	▪ Coherent MoE-led governance, mandates and sectoral councils clear; ▪ NQFS, APAE and sectoral councils link qualifications to labour market needs; ▪ Expanding PROAE/RTC network; established accreditation and QA procedures.	▪ Highly centralised governance; weak bottom-up inpu; ▪ Uneven interministerial coordination; partial data exchange (MoE–NES–QA; ▪ Fragmented funding/ administrative systems; ▪ Monitoring covers mainly non-formal; formal adult learning reported inconsistently; ▪ CPD project driven; limited institutional responsibility/ resources.	▪ Coherent governance with uneven coordination. The adult learning system operates within a **highly centralised governance model**, where MoE holds primary responsibility for policy development, coordination and supervision, while other bodies (QA, IIE, IEQE, NES and the Office) perform defined sectoral functions. Coordination is ensured through NQFS and the APAE process; ▪ Financing of AL is multi-sourced and **moderately adequate**, combining national and local public budgets, self-financing by learners, employer co-financing and donor support through EU and bilateral projects. Funding information remains fragmented across ministries and levels; ▪ A **broad participation of stakeholders** – at least with advisory functions – is evident across adult learning governance bodies. Employers, CCIS, unions and education experts are represented in the advisory bodies and sectoral councils, while local authorities contribute primarily through consultations in the APAE process. Involvement of learners and civil society remains limited, particularly in monitoring and evaluatio;. ▪ AL is **fully integrated** into the NQFS, coordinated by the Office. This integration ensures the recognition, portability and alignment of AL qualifications with EU frameworks; ▪ Quality assurance is ensured through legislation, accreditation, external and provider self-evaluation procedures. Monitoring of non-formal AL, including PROAE, VNFIL and CGC, is consolidated through the NQFS Register, while data on formal AL are partly reflected in EMIS. The quality of trainers and facilitators is ensured through project-based CPD programmes and accredited andragogical training. Overall, QA mechanisms are developed to a **considerable extent**, with stronger coverage for non-formal than formal AL.

Country	Strengths	Challenges	State of play
Ukraine	▪ Transparent attribution of responsibilities; good inter-sectoral coordination in formal adult learning; ▪ Updated NQF descriptors (June 2025); Register of Qualifications; 191 Qualification Centres; ▪ Broad provider network (VET, HE, QCs, municipal centres, private, NGOs, employers); several UNESCO Learning Cities; ▪ Mature CPD ecosystem, comprehensive QA architecture (NAQA, SSEQ, NQA/QCs, MoES, SES).	▪ No central adult learning coordination/ unified monitoring; ▪ Under-resourced/ donor- dependent financing; weak local incentives; ▪ No standardised national QA indicators; ▪ Weak social recognition of non-formal adult learning.	▪ AL governance is characterised by responsibilities of a **highly diverse** range of institutions, which have the duty of coordinating the design and implementation of AL policies. They include ministries, agencies and other relevant actors that happen to lack a formalised mechanism for the tasks entailed in coordination. As a result, advisory, consultative, decision-making functions are dispersed in different authorities. Planning, design, implementation and monitoring of non-formal AL initiatives is self-regulated; ▪ The participation of relevant stakeholders, such as employers, trade unions, civil society organisations and learners, is assessed as '**somewhat diverse**'. Their involvement becomes substantial primarily when they directly commission adult learning services from specific providers; ▪ AL governance is **highly fragmented** across multiple ministries and agencies, with no central coordination or unified monitoring structure. This fragmentation allows flexibility and experimentation, particularly in non-formal education, but limits system coherence, quality assurance, and scalability. Responsibilities are often unclear and coordination relies heavily on donor projects rather than institutional arrangements; ▪ The funding of adult learning provision is **moderately adequate**: while public funding for AL provision in formal education is limited, public-private partnerships can rely on donor projects; ▪ The recognition, portability and integration of adult learning outcomes/ qualifications is **integrated/linked** to NQF/NQS to a **certain extent**. It depends on the existence of occupational standards which allow the recognition of partial or full qualifications to be ensured; ▪ Quality assurance is **covered to a certain extent**. In the absence of a standardised framework, common indicators, or methodological guidance at national level, QA mechanisms exist at the level of providers both in formal education (well regulated) and non-formal education (demand-driven) programmes.

Source: authors, based on country factsheets

6. ADULT LEARNING PROVISION

This chapter focuses on the analysis of the current provision of adult learning in the EU enlargement area, both in terms of types of programmes and types of providers. It provides a comprehensive presentation of the different types of provision and providers, which aims to identify islands of innovation in AL provision as well as to systematise the types of actors involved at country level and across this group of countries. Finally, it also illustrates what type of support services are available to foster participation in AL.

Cross-country analysis of the factsheets shows that:

- adult learning supply is expanding but unevenly in all countries;
- there is a wide diversity of public providers of AL, however their integration into or complementarity with other education and training offers for further studies by adult learners demonstrate some limitations and dead ends;
- company-based learning is pivotal yet variable across sectors and rather limited or unmonitored in most of the countries;
- regarding support services, the strongest levers to convert latent demand into participation are lifelong learning and career guidance, transparent information and VNFIL; it should however be noted that while these components do prove efficient where they appear, they also vary in their level of implementation across countries.

6.1 Providers of adult learning in the EU enlargement area

This section is dedicated to mapping the type of providers and main actors responsible for AL provision. This information sheds light on the coverage of the territory by AL provision and the coverage of the needs encountered in the country in terms of regional diversity and type of providers/programmes.

AL provision is delivered by diverse ecosystems of public, private, municipal and civil-society providers, although the balance between actors varies widely. Centres of Vocational Excellence are a key actor in AL provision in some countries, although their integration with ALS is still developing. Countries such as Albania, Montenegro, North Macedonia and Serbia rely on strong networks of public VET schools, training centres and specialised institutions, complemented by private and NGO provision. Kosovo is developing innovative community-based structures such as the Youth and Adult Learning and Education Centres (YALEC), broadening outreach beyond traditional providers.

Box 7: Formal, non-formal and informal learning opportunities in Kosovo

The ALE NK is a non-formal multi-stakeholder platform established in 2022 with support from DVV International. It brings together government institutions (e.g. MESTI, EARK, and AVETAE), NGOs, training providers, the Pedagogical Institute and international partners to improve coordination and recognition of AL. Its work has focused on advocacy, awareness-raising and alignment with EU priorities. Steps are currently being taken to formalise the network and strengthen its sustainability and policy impact. The national chapter of the Electronic Platform for Adult Learning in Europe (EPALE) was officially launched in May 2025, further connecting the country to the European platform for AL and expanding opportunities for exchange, best practice sharing and access to EU-level resources.

Programmes covering active citizenship, often referred to as community, popular, or liberal education, include topics such as democracy, human rights, EU integration, health, entrepreneurship and cultural development, as well as recreational and personal growth activities like dancing, yoga, meditation or other occupational training. They are usually delivered as classroom trainings, workshops, seminars, sessions or study visits organised by NGOs, enterprises and training providers. An important initiative in this field is the establishment of Youth and Adult Learning and Education Centres (YALEC) in Prizren, Peja, and Vushtrri, with the support of DVVI and municipal authorities, following the German Volkshochschulen model. These centres offer inclusive LLL through non-formal programmes such as languages, digital marketing, tourist guiding, yoga, event management and soft skills courses. They demonstrate an initial commitment to holistic and community-based AL, fostering not only professional upskilling but personal development as well.

Source: adapted from ETF, 2026c

Moldova and Ukraine stand out for their extensive range of municipal learning centres, NGO-led programmes and community-based initiatives, which play an increasingly important role in reaching disadvantaged groups. Bosnia and Herzegovina remains the most fragmented system, with provider capacities and availability differing markedly by entity and canton.

Box 8: Non-formal adult learning providers in Ukraine

In Ukraine, non-formal AL can be delivered by VET schools, colleges, universities, municipal adult learning centres, NGOs and private providers. A network of Ukrainian AL centres and other VET providers offers non-formal training to adults of different age groups. These service providers usually offer a wide range of short-term courses and general and/or VET programmes.

Individual non-formal short courses are not licensed as such: quality/recognition flows through the National Qualifications System. Learning outcomes are recognised when assessed by QCs that award full or partial professional qualifications. Adult learning centres may partner with universities/VET schools to award their trainees with state-format documents for specific short programmes enhancing credibility. AL providers' certificates usually include hours, content, learning outcomes and numbering, although formal recognition varies by recipient. This category of training providers is extremely flexible and responsive to the needs of their target groups or partners. The quality of training is dependent on the actual participants' engagement with a particular course and their autonomy is undoubtedly greater than that of formal education institutions.

AL centres poignantly demonstrate high adaptability, inclusive design and strong local labour-market responsiveness, most notably in construction trades, health-related skills, digital competencies, and psychosocial support. Professional development for adults is most effective where programmes are co-produced with employers, embed practice-heavy pedagogy, articulate to formal pathways and include follow-up support (mentoring, job placement). System-level bottlenecks – recognition, data and stable financing – continue to limit scaling, but the ecosystem's plurality of providers and peer-learning innovations offers a robust base for post-war recovery and long-term human capital development.

There is a network of AL centres focused on people in detention and those recently released. Their training approach is built on peer education and delivered by trained social workers and paralegals. Their content covers harm-reduction (HIV/TB), legal basics, and mental-health/addiction support, including tailored counselling for veterans with incarceration experience. Local pilots in Ternopil (for women's hairdressing) and Rivne (for welding with state-recognised certification) demonstrate that profession-bearing programmes can be licensed within penitentiary-linked institutions. The personnel of penitentiary and policing services receive dedicated training on stigma reduction, interaction with target groups, and use of support applications. Scaling is constrained by insufficient equipment and consumables.

Source: adapted from ETF, 2026h

In all countries, a key structural divide emerges between formal providers, which are generally regulated, accredited and aligned with national qualifications frameworks, and non-formal providers, which tend to operate with much greater flexibility but weaker oversight, patchier funding and limited recognition. This is especially evident in Bosnia

and Herzegovina, Montenegro, Moldova and Kosovo, where large segments of non-formal providers remain outside verification systems, despite often being more adaptive and attractive to adult learners. Urban-rural disparities also persist across all eight economies: adults living in rural areas tend to be served by fewer providers, with limited programme choice and stronger dependence on project-funded interventions.

Table 8 Adult learning providers and coverage in the EU enlargement area

Country	Strengths	Challenges
Albania	▪ Wide provider mix: VET schools, VTCs, private colleges, universities, chambers, trade unions, NGOs; ▪ Growing collaboration with private providers and sector committees; ▪ AQF classification strengthens formal and some non-formal programmes.	▪ Gaps for marginalised groups, rural areas, early school leavers and returning migrants; ▪ Significant share of non-formal provision still unrecognised (many unaccredited short courses remain outside the qualification system); ▪ Private providers are not yet following accreditation procedures on a larger scale.
Bosnia and Herzegovina	▪ Wide provider mix: accredited VET schools, private providers, NGOs, chambers; ▪ PES funds and implements short-term LM training.	▪ Strong territorial fragmentation across entities/cantons; large variation in provider capacity; ▪ Formal provision dominated by public VET schools; ▪ Non-formal providers dynamic but poorly monitored and often outside verification and quality systems.
Kosovo	▪ Wide provider mix: public VET institutions, private providers, NGOs, enterprises; ▪ YALEC expands community-based provision; ▪ Providers cover employability-focused learning well.	▪ Civic/personal learning providers underrepresented; ▪ Provision is limited for rural/older adults; NGOs not well integrated into governance; ▪ Community learning is still at an early stage.
Moldova	▪ Wide provider mix: VET schools, centres of excellence, municipal adult learning centres, NGOs, private providers; ▪ Formal providers well-established; flexibility of non-formal provision; ▪ Strong municipal/NGO role in outreach.	▪ Fragmented provider coordination; overlapping roles (MER, ANOFM, VET institutions, NGOs); ▪ Non-formal provision uneven and often project dependent; ▪ Limited provision in rural areas

Country	Strengths	Challenges
Montenegro	▪ Wide provider mix: primary/secondary schools, VET institutions, universities, NGOs, private training centres.	▪ High share of non-verified non-formal providers operating outside framework; ▪ Regional disparities; limited provision in north/south; ▪ Attractiveness and access uneven geographically.
North Macedonia	▪ Public providers deliver remedial and verified non-formal programmes; ▪ Institutional roles clear.	▪ Non-verified providers are largely invisible to the system and excluded from recognition/monitoring; weak coordination with formal sub-sector; ▪ Low adult engagement with providers; ▪ Provision remains narrow.
Serbia	▪ Strong PROAE/RTC network; NES training; civic CPD options; ▪ Extensive provision structured via NQFS; ▪ Balanced mix of formal and non-formal providers.	▪ Dropouts in FBAE/secondary adult learning; ▪ Limited non-work-related providers; ▪ Few VNFIL providers exist; procedures are complex; ▪ Access constrained by cost leading to uneven participation.
Ukraine	▪ Wide provider mix: VET, HE, municipal adult learning centres, NGOs, Qualification Centres, digital providers; ▪ 191 QCs operational; ▪ Non-formal providers and initiatives are quite responsive to adult learners' needs.	▪ War disruptions; closures and regional disparities; ▪ No unified catalogue of non-formal provision; uneven quality; ▪ Uneven provider ecosystem; formal pathways less flexible.

Source: authors, based on country factsheets

Overall, while countries have made progress in expanding the range of providers and entry points into AL, challenges remain in ensuring coherence, equitable coverage, sustainable provision and integration of non-formal actors into the national systems. The provider landscape is dynamic but uneven, requiring stronger coordination and better alignment with quality assurance and labour-market mechanisms.

6.2 The main types of provision

This section highlights the types of AL programmes that are currently available (formal and non-formal) and their primary objectives and target groups. It allows the constellation of AL opportunities to be mapped and in the process also encounters examples where

countries are innovating and understanding to what extent the provision matches the needs of the different groups of adult learners. It does this by identifying which needs are only partially covered by supply and which are not covered at all.

All countries offer a mix of formal and non-formal, though the scope, flexibility and labour-market responsiveness of these offers differ substantially. Albania, Montenegro and Serbia provide structured pathways through formal VET, general education completion and modular upskilling and reskilling courses. Kosovo has a high proportion of adult qualifications validated within the NQF, while Moldova and Ukraine show strong diversification through micro-credentials, community learning, digital programmes and employer-requested training. In Bosnia and Herzegovina and North Macedonia, the range of provision exists but is undermined by fragmentation, lack of labour market relevance checks, and limited visibility of the non-verified non-formal sector.

Table 9. Adult learning provision (formal and non-formal learning; qualifications; flexibility)

Country	Strengths	Challenges
Albania	▪ Wide spectrum of provision options: formal general/VET, post-secondary, modular upskilling, digital, entrepreneurship, targeted programmes; ▪ Mix of formal (AQF-linked) and wide non-formal market; ▪ Integration of non-formal adult learning into AQF; ▪ VNFIL emerging.	▪ Provision only partially responsive to vulnerable groups and rural populations; ▪ Digital/green upskilling for employed adults underdeveloped; ▪ Many short courses remain unrecognised.
Bosnia and Herzegovina	▪ Broad formal (levels 2–5) and non-formal offer; short ALMP training; ▪ VNFIL pilots underway.	▪ Fragmentation by administrative unit; ▪ Labour market relevance is not a mandatory criterion for programme verification; ▪ Moderately diversified but uneven provision; ▪ Limited data on non-verified provision.
Kosovo	▪ Strong NQF-linked supply; >75 % validated qualifications are related to adult learning; ▪ VTC and ALMP-linked provision is strong; ▪ YALEC adds community learning; ▪ Good range of formal/non-formal offers; labour-market focus strong but not unique.	▪ Personal/civic learning limited; outreach to adult learning for these offers is insufficient; ▪ VNFIL uptake is low; ▪ Information systems are weak.

Country	Strengths	Challenges
Moldova	▪ Wide spectrum of provision options: formal general/VET, CVET, micro-credentials, community courses, life skills, language programmes; ▪ Flexible provision and moderately attractive.	▪ Limited second-chance and full qualification pathways; ▪ Fragmented, urban-centred and uneven provision.
Montenegro	▪ Wide spectrum of provision options: formal adult learning across all levels; verified non-formal covering vocational and micro-qualifications and key competences.	▪ VNFIL early-stage; limited sector coverage; ▪ Many non-verified courses outside NQF; ▪ LM relevance inconsistent, attractiveness moderate; regional disparities remain.
North Macedonia	▪ Verified non-formal programmes exist; remedial education available; ▪ Non-verified provision is significant	▪ VNFIL system implementation very limited; ▪ Weak data on provision; ▪ Non-verified provision not yet regulated/ accredited; ▪ System only partially matches learner diversity.
Serbia	▪ Wide spectrum of provision options: FBAE, secondary adult learning, re/ upskilling, specialisation, PROAE/RTC programmes, NES training, CPD; ▪ VNFIL formally established; ▪ Broad, NQFS-linked provision;	▪ Limited personal/social/civic learning; system strongly labour market oriented; ▪ Dropout rate significant in formal adult learning; ▪ Partial match for broader adult needs; ▪ Affordability barriers persist.
Ukraine	▪ Wide spectrum of provision options across formal and non-formal learning; micro-credentials; WBL; digital programmes.	▪ Persistent structural gaps (no unified catalogue, uneven quality, formal provision less responsive than non-formal, etc.) aggravated by war impact; ▪ Moderately attractive.

Source: authors, based on country factsheets

One cross-country pattern is the expansion of short, modular, flexible non-formal programmes, namely digital literacy, green skills, entrepreneurship, language learning and soft skills. These programmes respond effectively to adult learners' time constraints and labour market needs. North Macedonia is moving forward with the development of micro-credentials with the support of an Erasmus+ supported project. However, in most of the EU enlargement area, these offers still lack systematic recognition, leaving many adults with certificates that do not translate into portable labour market value unless supported by VNFIL or qualification frameworks. Furthermore, provision for civic, personal and community learning remains comparatively weak across the region, with a predominant focus on employability and skills for the labour market.

In summary, the relevance and inclusiveness of provision remain partial: whereas adults in urban areas and those already engaged with the labour market benefit from diverse offers, disadvantaged groups – notably rural adults, low-skilled individuals, return migrants and older learners – continue to face barriers. The systems are evolving but have not yet achieved a balanced and coherent lifelong learning offer encompassing both labour-market-oriented pathways and broader adult development.

6.3 Support services relating to adult learning provision

This section analyses the support services available to adult learners, such as the existence of lifelong counselling and guidance, validation of non-formal and informal learning (VNFIL), information channels and other complementary areas of intervention in ALS. It complements this analysis with a comprehensive overview of where countries stand in relation to a fully fledged ALS that enables adult learners to access and complete educational and training pathways.

The table below presents the availability of these support services in the eight countries and their level of completion.

Table 10. Adult learning support services

Country	Adult guidance	Information portals	VNFIL	Notable remarks
Albania	Partial	Partial	Developing	Strengthened outreach and flexible pathways.
Bosnia and Herzegovina	Partial	Partial	Developing	Variation across entities/cantons.
Kosovo	Partial	Yes	Yes	Career counsellor qualification (NQF-5).
Moldova	Partial	Partial	Developing	Active CSOs; room for scaling up AL public services.
Montenegro	Partial	Partial	Partial	Clear emphasis on green and digital
North Macedonia	Developing	Yes	Developing	Validation prioritised.
Serbia	Partial	Yes	Partial	Equity focus for low-qualified adults/SMEs.
Ukraine	Expanding	Yes	Developing	CoVEs, guidance and digital tools under recovery.

Source: authors, based on country factsheets

AL support services – outreach, career guidance (CG), ALMPs, validation of non-formal and informal learning, and learner support – remain among the least mature components of ALS across the EU enlargement area. One cross-cutting finding emerging from the country analysis is that many adult learning support services continue to be designed and regulated following institutional models originally developed for initial education systems. While this has facilitated formal integration into education governance frameworks, it has often resulted in mechanisms that are poorly adapted to adult learners' realities. In practice, this is often reflected in overly procedural or rigid approaches, or limited flexibility in service delivery and weak responsiveness to adults' diverse profiles, prior learning experiences and time constraints. These legacies may help to explain why, despite formal availability, support services remain fragmented, underused and insufficiently effective in converting demand into participation. A recurring weakness across systems is the limited integration of learners' perspectives into the design of adult learning support services. Services are predominantly structured around institutional and regulatory requirements rather than user-centred pathways, contributing to low visibility, weak uptake and fragmented learner journeys.

Albania, Serbia and Kosovo have made notable progress in career guidance and counselling (CGC) for adults, embedding services within employment offices, VET institutions and, increasingly, specialised guidance centres.

Box 9: Career guidance and counselling services in Serbia – a system in the making

Career guidance and counselling services (CGC) for adults in Serbia are integrated across education and employment and regulated through APAE processes and related rulebooks. Their goal is to support adults in taking educational, training and employment decisions.

The CGC Standards Rulebook (Official Gazette RS 43/2019) sets out four groups of standards – career management skills, practitioner competences, service organisation and programme standards – all of which are now in the final stages of revision. In 2024, emphasis shifted to operationalising this framework through targeted training programmes, seminars and webinars (including Euroguidance/EPALE activities), support for Rulebook implementation and a Quality Assurance Working Group coordinated by the QA. The revised and improved Standards for CGC have been drafted and the final phase of the consultative process is in progress, aiming for the improved Standards for CGC to be published by the end of 2025. In line with LNQFS (2023), the Qualification Agency monitors the implementation of CGC services and the application of CGC standards. In 2024, 17 PROAE providers offered 19 CGC programmes serving 336 participants, while NES delivered counselling to 9 377 jobseekers, including digital and employability workshops.

System-building measures underway include cross-sector data mapping, creation of a national CGC Portal and full digitalisation of PROAE accreditation for CGC (completion expected in 2025). CGC and VNFIL often operate jointly within the same providers, enabling adults to validate prior learning or access targeted upskilling/reskilling pathways.

Source: adapted from ETF, 2026g

Montenegro has launched a more structured CGC approach under its 2025–2030 Strategy, while North Macedonia has developed comprehensive professional standards for guidance counsellors. In Moldova and Bosnia and Herzegovina, support services depend heavily on municipalities, Public Employment Service offices and NGOs, leading to highly uneven territorial coverage. Ukraine demonstrates extensive active labour-market measures (e.g. State Employment Service vouchers, eRobota) but outreach and guidance remain inconsistent.

Despite these developments, system-wide gaps persist. Outreach to vulnerable groups – rural adults, older adults, low-qualified workers, and minority groups – remains limited across all economies. Many services continue to be project based, donor driven, or inconsistently integrated with formal provision, especially in Kosovo, Montenegro, Moldova and Bosnia and Herzegovina.

For more detail, Table 11 systematises the analysis of support services available in the EU enlargement area.

Table 11. Adult learning support services – current progress

Country	Support services available	Challenges
Albania	▪ Youth Guarantee strengthens ALMP–AL link; ▪ Expanding guidance, counselling, outreach via PES/education institutions; ▪ VNFIL emerging; AQF supports recognition.	▪ Limited tailored support for marginalised/rural adults; ▪ Many support services still project-based; ▪ Attractiveness still moderate.
Bosnia and Herzegovina	▪ PES provides training and guidance; Europass/Euroguidance integrated.	▪ CG uneven and fragmented; weak interinstitutional coordination; ▪ Mainly PES-led guidance; limited reach to non-formal pathways; support partial; ▪ Inclusion measures sparse.
Kosovo	▪ Availability and strengthening of CGC (VTC guidance centres, Level 5 counsellors) and outreach; ▪ VTC/EARK strong in ALMP-linked services.	▪ Support services (CG and outreach) fragmented and very limited; weak information systems; ▪ VNFIL underused and still insufficient.
Moldova	▪ Mix of public/NGO/donor support services: Municipal centres enhance community access; ANOFM supports LM-linked training; donor innovations in support tools.	▪ No unified support system; fragmented and overlapping structures; ▪ Under-supported rural areas; weak sustainability; ▪ Inclusion improving but uneven.

Country	Support services available	Challenges
Montenegro	▪ New 2025–2030 Strategy strengthens CGC; plans for Career Centre; standards for counsellors in place; ▪ Support services in place, e.g. career guidance but remain mainly project-based and limited in outreach.	▪ CGC concentrated on unemployed; limited for employed adults and vulnerable groups; ▪ Mainly project-based support programmes; ▪ Incomplete availability of support services; CGC weakly integrated into AL provision.
North Macedonia	▪ Strong CG framework (competence profile, CMS, ethical codes); ▪ Support services in place while a strong effort for VNFIL system implementation is ongoing and for career guidance services operationalisation	▪ Limited capacity, visibility and outreach of support services including CGC.
Serbia	▪ CGC embedded across sectors; PROAE integrates CGC and VNFIL; structured guidance pathways; ▪ Inclusion measures set (FBAE, ALMPs).	▪ Uneven CPD for counsellors; PROAE services constrained by affordability barriers; ▪ Dropout and cost barriers persist.
Ukraine	▪ SES training/vouchers; eRobota grants; municipal adult learning centres; CPD networks; ▪ Strong in active LM measures.	▪ Outreach and CGC inconsistent; SES centres vary greatly; war impacts service delivery; ▪ Support services partially cover needs while being weaker in lifelong guidance.

Source: authors, based on country factsheets

Information systems for adult learners are underdeveloped in most of the countries and several lack national databases of adult learning programmes, reducing transparency for learners and limiting strategic steering. Albania proves to have quite effective digital information services for potential adult learners.

Box 10: Albania: expanding digital outreach through e-portals

Dedicated outreach includes online portals (e.g. national VET and employment service websites ([14])), in-person information days and open events. E-Albania, the Public Services Portal (*Portal i Shërbimeve Publike*) serves as a comprehensive digital platform for information about all public education opportunities.

Furthermore, also under the framework of the Youth Guarantee Implementation Plan, another dedicated website was created, the National Youth Guarantee Digital Portal, which has been built to serve the outreach and information needs of the NEET's target group for employment, vocational training and education opportunities (MoECI, 2024). Similarly, the youth portal managed by the National Youth Agency is available and offers a number of opportunities for young adults.

Source: adapted from ETF, 2026a

Overall, support services are improving but remain fragmented, uneven and insufficiently connected to AL pathways. Stronger lifelong guidance ecosystems, sustainable outreach mechanisms, integrated validation systems and reliable information platforms are essential if countries are to raise adult participation, improve retention and ensure that learning pathways are accessible, navigable and inclusive.

A summary table aggregating information is presented (Table 11) including the analysis of the strengths, challenges and state of play about the types of providers, provision and support services in the EU enlargement area.

[14] The NAES website serves as a hub where jobseekers can find jobs or vocational training opportunities, and employers can register vacancies, apply to be part of ALPMs, etc.

Table 12. Strengths, challenges and state of play on type of providers, provision and support services for adult learners in the EU enlargement area[15]

Country	Strengths	Challenges	State of play
Albania	▪ Broad range of public, private and NGO providers; strong AQF alignment; ▪ Wide mix of formal and non-formal provision: modular, hybrid, evening, digital, green skills; ▪ Growing guidance, outreach, ALMP links (Youth Guarantee).	▪ Provision still insufficient for rural, low-skilled, marginalised adults; ▪ VNFIL not yet fully operational; ▪ Non-formal programmes often unrecognised; outreach uneven; employed adults lack targeted upskilling options.	▪ Provision **moderately diverse but unevenly accessible**; formal provision is well structured; non-formal offer dynamic but partly outside QA; ▪ Given the low participation in AL, these programmes **partially match the diverse needs of adult learners**, especially for certain vulnerable groups (like people with disabilities or from highly disadvantaged social backgrounds) and significant gaps remain in rural outreach, gender equity and inclusion; ▪ Support services improving but **remain moderate in reach and attractiveness**.
Bosnia and Herzegovina	▪ Broad range of formal/non-formal providers; PES active; significant NGO/chamber role; ▪ VNFIL pilots; ▪ Europass/ Euroguidance support mobility.	▪ Strong territorial fragmentation of support service provision and uneven provider capacity; ▪ Weak LM relevance checks; ▪ Low attractiveness; ▪ Data gaps for non-formal provision; ▪ CGC uneven and poorly integrated; under-resourced.	▪ Diverse but fragmented landscape; non-formal sector largely outside recognition. Provision **only partially matches the needs** of diverse learner groups; participation among low-qualified, rural, and vulnerable adults remains low; ▪ **Support services partial** and largely PES-driven. VNFIL remains at an early stage of development, with a lack of a harmonised framework and limited institutional capacity. Piloting is envisaged in several cantons of the Federation of Bosnia and Herzegovina and in the Brčko District in Bosnia and Herzegovina, while in Republika Srpska, despite a more developed AL framework, VNFIL has not yet been established as a functional and systemically implemented mechanism; ▪ Overall, AL provision is **moderately attractive** but not yet fully responsive to labour market and learner diversity needs; stronger data systems, recognition mechanisms and national coordination are required.

[15] The robustness of country-level assessments varies depending on the strength of the underlying evidence available for each analytical dimension.

Country	Strengths	Challenges	State of play
Kosovo	▪ Broad range of providers incl. VET schools, private providers, NGOs, community centres (YALEC); ▪ Strong NQF-linked qualifications; >75 % adult learning qualifications validated; ▪ Strengthened CGC (VTC centres; Level 5 counsellors).	▪ Limited civic/ personal learning; ▪ Weak outreach in rural areas; ▪ Low VNFIL uptake; ▪ Fragmented information systems; ▪ Heavily project-dependent.	▪ Adult learning is **diverse** as it is delivered by public VET providers, private providers, NGOs, and enterprises, with formal NQF-linked programmes strictly regulated and non-formal provision more diverse and largely driven by the private sector; ▪ Provision only **partially addresses the diversity, equity and inclusion needs of adult learners**. Outreach to vulnerable groups remains limited and personal or civic learning remains underdeveloped compared to labour-market-oriented training with some progress through community initiatives such as YALEC; ▪ Support services in place but are **fragmented and inconsistent**. Outreach is mostly project-based, and the VNFIL is underused.

Country	Strengths	Challenges	State of play
Moldova	▪ Broad range of providers; ▪ VET schools, centres of excellence, municipal adult learning centres, NGOs, private providers; ▪ Wide mix of provision: broad formal/non-formal offer incl. micro-credentials, community courses, language programmes; ▪ Strong ANOFM-linked training and donor innovation.	▪ Non-formal sector poorly recognised; weak employer trust; ▪ Fragmented delivery and coordination; rural under-provision; ▪ Data gaps; ▪ Weak VNFIL implementation; ▪ Project dependence.	▪ AL in Moldova includes formal, non-formal and informal programmes. Target groups are broad, including jobseekers, working adults in need of upskilling or reskilling, adults who interrupted their education (for second-chance education), retirees, socially vulnerable populations, and adults seeking personal or civic development. Municipal and NGO-led centres aim to reach vulnerable groups and those excluded from formal education. Thus, **AL provision partially matches the needs of different adult learner groups**; ▪ The system offers flexibility and a variety of pathways, but significant barriers remain for rural populations, people needing to complete full general education and socially disadvantaged adults. VNFIL still at a pilot stage with limited scale and reach. AL support services are still evolving; ▪ Significant gaps remain, including limited provision outside major urban centres, the lack of sustainability in many non-formal offers, insufficient availability of second-chance general education and full qualification pathways and a lack of recognised certification for most non-formal programmes within the NQF. Overall attractiveness of AL programmes is **moderate**; good for certain groups (urban adults, those seeking modular training, etc.), but not universally accessible or inclusive. On diversity and inclusion, **AL provision is somewhat inclusive**.

Country	Strengths	Challenges	State of play
Montenegro	▪ Broad range of providers: formal AL (primary/ post-secondary) + verified non-formal programmes, micro-qualifications, key competences; ▪ CGC strengthened via 2025–2030 Strategy; new standards for counsellors; ▪ Emphasis on green/digital skills development.	▪ VNFIL early-stage.; ▪ Many learners attend non-verified programmes outside NQF; ▪ CGC still focused on the unemployed; ▪ Project-dependent support services.	▪ AL in Montenegro includes formal programmes (primary, secondary, and post-secondary education for adults) and verified non-formal programmes that lead to vocational or partial qualifications, key competences or micro-qualifications. These are mainly designed to enhance employability and lifelong learning opportunities. The offer **partially matches the needs of diverse adult groups**, as participation among vulnerable, low-skilled and rural populations remains limited and regional disparities persist; ▪ AL is delivered by a mixed network of public and private providers, including primary and secondary schools, VET institutions, universities, NGOs, and private training centres. While verified programmes dominate policy attention, a large share of non-verified non-formal provision operates outside the formal framework. Overall, the offer is **moderately attractive**, with vocational and key competence programmes being the most popular. However, access is uneven and awareness of available opportunities, especially in the north and south, remains low; ▪ AL still **lacks comprehensive support services** and mechanisms. Career guidance and counselling for adult learners is underdeveloped and insufficiently linked to training and employment pathways.

Country	Strengths	Challenges	State of play
North Macedonia	▪ Clear institutional provider roles; verified adult learning programmes; strong CGC standards.	▪ VNFIL incomplete; verification does not require LM relevance; ▪ Data gaps; ▪ Low adult motivation and weak public awareness; ▪ Non-verified providers largely invisible.	▪ The system offers remedial education as well as verified non-formal adult learning programmes leading to the acquisition of qualifications and skills mainly serving for the improvement of labour market competitiveness, whereby the labour market responsiveness of the programmes is not a requirement for verification; ▪ AL provision only **partially matches the needs of different groups of adult learners**, addressing the issues of diversity, equity and inclusion (the scarcity of data does not allow for a more in-depth analysis of enrolled and graduated adult learners in all types of programmes). On the other hand, there is no coordinated action of the non-verified providers to articulate their needs; ▪ AL provision in North Macedonia is **moderately attractive**, though more needs to be done to further inform and raise awareness of the different types of provision, including VNFIL.

Country	Strengths	Challenges	State of play
Serbia	▪ Strong PROAE/ RTC network; well-developed formal and non-formal pathways; ▪ CGC embedded across education/ employment; ▪ VNFIL formally established.	▪ High dropout in FBAE/secondary adult learning; ▪ Limited civic/ personal learning; affordability/cost barriers for adults; ▪ VNFIL underused due to complexity and co-financing.	▪ AL is organised in formal and non-formal tracks linked, where applicable, to the NQFS, spanning FBAE, secondary AL, re-/ up-skilling and specialisation, education in correctional institutions, PROAE/RTCs provision, NES-delivered programmes and civic service CPD; ▪ AL **largely matches labour-market and employability needs**, but **only partially matches the broader needs of diverse adult learner groups** such as civic engagement, personal development and cultural participation; ▪ An inclusion-oriented approach is reflected through FBAE and ALMP programmes with targeted outreach and retention measures; ▪ Non-formal AL is largely funded through participant contributions (58 % of programme costs in 2024), which may limit access for low-income and unemployed adults. VNFIL, intended to ease access to qualifications, is still used on a limited scale due to complex, formalised procedures and candidate co-financing. Hence, **AL provision only partially matches the needs of adults** with limited financial resources and those with work experience but no formal credentials; ▪ AL provision in Serbia can be considered **relatively well-developed**, offering multiple pathways linked to recognised qualifications within a structured NQFS framework. Adults can access formal routes with flexible pacing and VNFIL options, complemented by diverse PROAE provision in vocational fields. At the same time, system effectiveness is still affected by affordability barriers, retention challenges in formal programmes and a comparatively narrow thematic scope in areas beyond labour-market competences.

Country	Strengths	Challenges	State of play
Ukraine	▪ Broad range of providers (VET, HE, municipal, NGOs, Qualification Centres). 191 QCs operational; ▪ Wide mix of provision, including: micro-credentials, digital learning, WBL; ▪ Strong ALMPs (vouchers, eRobota); active municipal learning centres.	▪ No unified catalogue of programmes; transparency and quality vary; ▪ War disrupts provision; large regional disparities; ▪ Outreach and CGC inconsistent; SES centre capacity varies.	▪ Both formal and non-formal AL programmes are currently available and aim to meet the needs of various target groups on professional development, upskilling and/or reskilling purposes but they still only partially match needs. AL providers of non-formal education sector state services are wide and **fully match the needs of their target audience** addressing the issues of diversity, equity and inclusion; ▪ In the sector of formal education, AL is pre-planned and structured according to the demands of occupational standards or other job-descriptive documents and can be considered **partially matched** because in most cases it has the formal character of delivery and lack of orientation to the real needs of the target group; ▪ AL provision is **moderately attractive**. There is a broad variety of AL providers in the sector of non-formal education and the traditional set of AL providers in the formal education sector. The difference between formal and non-formal provision is significant, reflecting the formal and standardised approach for the formal education sector and high responsiveness to labour market need in the sector of non-formal education. Therefore, the attractiveness of the existing programmes in the non-formal sector is higher while the official recognition provided by formal education reflects their traditionality. Persistent gaps in Ukraine's ALS reveal structural, institutional and contextual limitations that affect both quality and accessibility.

Source: authors, based on country factsheets

PART III. CONCLUSIONS AND SELECTED RECOMMENDATIONS ABOUT THE WAY FORWARD

7. CONCLUSIONS

The evidence collected validated the study's assumption: in the countries analysed, AL has gained increasing political attention and new awareness that participation in adult learning must be a reality for all. Following the reform focus on initial education and training as a foundation of any lifelong learning and human capital development system, the emerging drivers of change – the demographic dynamics, the financial crises of 2008 and 2015, the Covid-19 pandemic, climate change and technological acceleration – have forged a new impetus for adult learning.

Beyond its internal system characteristics, AL also emerges as a strategic policy instrument for addressing a range of key challenges faced in the EU enlargement area. These include persistent skills mismatches, demographic decline and outward mobility, labour shortages in specific sectors and the need to support economic transformation and social cohesion. The analysis suggests that well governed ALS can contribute to mitigating these challenges by enabling skills development and redeployment over the course of one's life, supporting labour-market transitions, and strengthening

individuals' attachment to local economies and communities. Realising this potential, however, depends on the involvement and shared responsibility of a wide range of actors, including public authorities, social partners, education and training providers and companies, notably with regard to financing, provision and workplace-based learning opportunities.

The eight factsheets provide significant detail on progress in the respective country strategies, policies and legal frameworks. The conceptual framework (chapters 1 and 2; ETF, 2026) has provided a system approach lens to analyse AL, and the study's analytical framework has allowed the state of play to be captured in Dimension I, II and III in a comparative manner. Building on this methodology, this cross-country report summarises and compares findings, highlighting commonalities and differences while doing so. It is important to recall that the conclusions presented in this chapter draw on a common analytical framework and qualitative methodology based on desk research, expert interviews and available documentation. Regarding administrative data, adult learning data collection, indicators and monitoring arrangements, the evidentiary basis is not equally strong or accessible across countries and dimensions. The conclusions therefore focus on identified patterns of system advances, stakeholder engagement in the governance, quality assurance and types of provision, while pointing at the observed variation in the strength of the quantitative data and indicators for monitoring is as an area requiring attention. The conclusions can overall serve self-reflection and policy dialogue within and between the EU enlargement area and the EU.

7.1 Strategies, legal frameworks and policies

Strategies and legal frameworks for adult learning show substantial progress in the EU enlargement area. We define coherence as the alignment between strategies and legislation, which we have observed to be strong in five countries and partial in three cases. In the majority of cases, adult learning is embedded in existing education, lifelong learning and employment strategies; at the same time, the sector has also gained recognition within economic and regional development strategies. A structured link with strategic planning in terms of targets, indicators of achievements, resource allocation and timeframes is missing, with the exception of Albania. Education laws that are oriented towards lifelong learning are more likely to elaborate on adult learning as a lifelong learning component. As documented in Chapter 4, fragmentation is prevalent in adult learning policies; notably, in five cases, fragmentation is extensive and in three cases it is mitigated.

Table 12 shows the trends that emerge when cross-referencing the coherence between strategies and laws, and the fragmentation of the existing policies. Three main patterns emerge:

- coexistence of strong coherence between strategy and legal framework with fragmented policies, e.g. Moldova and North Macedonia;

- partial alignment between strategies and laws combined with fragmented policies, e.g. Bosnia-Herzegovina, Kosovo and Ukraine;
- coexistence of strong strategy-law coherence with limited policy fragmentation, e.g. Albania, Montenegro and Serbia.

Table 13. State of play – laws, strategies and policies

Sub-dimensions	AL policies are fragmented	AL policies are not so fragmented
Coherence: legal framework and strategy are fully aligned	Full alignment of law and strategy, fragmented policy – two countries (MD, NM)	Full alignment of law and strategy, not such fragmented policy – three countries (AL, ME, RS)
Coherence: legal framework and strategy are partially aligned	Partial alignment of law and strategy, fragmented policy – three countries (BiH, XK, UA)	

Source: authors

Looking at individual countries, we observe five cases of coherence between strategies and legislation. Albania, Montenegro, North Macedonia and Moldova have developed comparatively comprehensive legal architectures integrating adult learning within broader education, employment and skills strategies. Serbia offers a coherent overarching framework, yet implementation lags in the absence of revised Adult Education Law. In Kosovo and Ukraine, adult learning is increasingly referenced across policy documents; the absence of a dedicated adult learning strategy reduces visibility and limits strategic focus. Bosnia and Herzegovina remains an outlier: although principles and standards exist, the legal and strategic framework is fragmented across entities and cantons, constraining uniform system development.

With AL referred to in various strategies and laws, in many economies, the legislative emphasis remains weighted towards formal vocational and compensatory education. Definitions of non-formal learning remain inconsistent and attention to civic, community and personal development learning is limited. Greater strategic ambition and legislative follow-up would imply expanding the definitions and approaches of lifelong learning to benefit the breadth of AL opportunities. Besides, where secondary legislation is incomplete (i.e. Montenegro, North Macedonia and Moldova at the time of country-level data collection), full implementation of VNFIL, programme verification and quality assurance are constrained. Current policies are resent from these somewhat reduced ambitions. Consequently, there is a degree of fragmentation in all countries' AL policies.

Data collection for regular monitoring of AL key indicators is lacking in most of the countries, as is systematic collection of statistics for international comparison and benchmarking with EU indicators. At this stage, the available evidence makes it difficult to know the evolution of adult learning in a deeper sense, in terms of participation and quality, and to support further policy development. Moreover, opting for lifelong learning-oriented ALS involves choosing indicators that pertain to type and quality of learning, beyond quantitative participation.

The convergence driven by the EU Enlargement process is expected to bring further alignment with European priorities, with a view to establishing coherence and operational readiness of ALS. This applies both to alignment between EU-level frameworks and national strategies, and to coherence across national policy domains, including adult learning, continuing vocational education and training, higher education, employment and social policies. In several cases, adult learning operates in parallel with adjacent policy areas, resulting in fragmented pathways, inconsistent incentives and weakened impact at system level.

7.2 Institutional arrangements, governance and financing

Institutional arrangements across the EU enlargement area reflect a movement towards structured governance, though the balance between centralised steering and decentralised implementation varies significantly.

Table 13 highlights that adult learning governance across the region is characterised by a gradual shift towards more structured and coordinated arrangements, although coordination mechanisms remain unevenly developed. Most countries fall within the 'medium coordination' category, suggesting that formal governance structures and interinstitutional arrangements are increasingly being put in place. However, coordination often remains dependent on ad hoc or project-based cooperation and is not yet fully institutionalised. 'Limited coordination' is generally associated with insufficient interinstitutional coordination, overlapping responsibilities and weak mechanisms for cross-sectoral cooperation. Across all countries, non-state stakeholder participation in adult learning governance is expanding, for example, through sectoral skills committees, but governance bodies and processes typically feature limited diversity. North Macedonia and Serbia are exceptions, with greater diversity of involved stakeholders, including in their respective adult education councils. While the latter demonstrate broader stakeholder engagement, the role of social partners, civil society organisations and local actors is predominantly advisory and insufficiently embedded in policy design, implementation and monitoring.

Overall, the four patterns in Table 13 suggest that governance frameworks for adult learning are becoming more clearly defined and structured, with three patterns showing a progression from limited to well-developed interinstitutional coordination. Only in the fourth pattern, found in North Macedonia and Serbia, does medium coordination coexist with the involvement of a diverse body of non-state actors. Therefore, stronger and more inclusive coordination mechanisms are still needed to support coherent and effective adult learning systems.

Table 13. State of play – institutional arrangements and governance

Sub-dimensions	Limited coordination	Medium coordination	Well-developed coordination
Some diversity of stakeholders involved in ALS governance	Some diversity of stakeholders involved in ALS governance and limited coordination – three countries (BiH, XK, UA)	Some diversity of stakeholders involved in ALS governance and medium coordination – two countries (MD, ME)	Some diversity of stakeholders involved in ALS governance and well-developed coordination – one country (AL)
High diversity of stakeholders involved in ALS governance		High diversity of stakeholders involved in ALS governance and medium coordination – two countries (MK, RS)	

Source: authors

Albania, Montenegro, North Macedonia and Serbia operate predominantly centralised governance models, with clear mandates for ministries and specialised agencies. Moldova is strongly centralised in policy and regulation, although implementation is decentralised through local authorities and non-state actors. Centralisation has advantages when matched with steering capacity, as shown by the case of Montenegro's decision to establish a lifelong learning department in charge of AL. In contrast, Bosnia and Herzegovina and Ukraine exhibit overlapping responsibilities and coordination challenges across administrative units and ministries. Kosovo sits between these models, with formal decentralisation but de facto centralised decision-making.

Human and institutional capacity is a transversal issue that continues to affect policy implementation, monitoring and quality assurance. Stakeholder engagement is generally stronger at national level than at local or provider level and, within the policy cycle, social partners, NGOs and civil society are often underrepresented in planning and oversight. Systems that rely heavily on project-based cooperation (Bosnia and Herzegovina, Moldova, Kosovo) face additional sustainability challenges. Overall, despite increasingly well-defined governance frameworks, system performance is hampered by fragmentation, weak coordination and insufficient decentralised capacity.

Financing for adult learning remains one of the weakest and least predictable dimensions across the region. While all countries rely on mixed funding sources (state budgets, donor support, employer co-financing and learner contributions), funding arrangements are often unstable and insufficient, particularly for non-formal learning. Albania, North Macedonia and Serbia have elements of predictable public financing, but adult learning still competes with other priorities and receives limited dedicated allocations. Kosovo, Moldova and Montenegro depend heavily on project-based or fee-based provision,

undermining sustainability and continuity. In 2026, Montenegro set the first example of a dedicated budget line for adult learning. Bosnia and Herzegovina have the most pronounced disparities: some jurisdictions (RS) have stable funding, while others (FBiH cantons, BD) rely almost entirely on fragmented, short-term resources.

The absence of systemic funding mechanisms, e.g. levy schemes, training funds, tax incentives or multi-annual budgeting, limits employers' engagement and adult participation. Financial barriers particularly affect unemployed adults, low-income learners and rural populations. At the same time, heavy reliance on external funding leaves systems vulnerable to interruptions once donor cycles end and constrains long-term planning. Overall, financing models across the region are moderately adequate for maintaining basic provision but insufficient for expanding participation, ensuring equity or modernising adult learning.

The region shows clear progress in QA, but this remains two-speed. Quality assurance systems have progressed substantially for formal VET and adult education, supported by national agencies and frameworks. Albania, Moldova, Montenegro and Serbia have established accreditation procedures, institutional evaluation and standards linked to national qualifications frameworks. Ukraine has a multi-layered QA architecture covering higher education, VET and professional qualifications. These developments create a solid basis for consistent provision and system transparency.

However, the overall progress of QA in the region, as regards non-formal education and community learning, is weak, partial or absent throughout most of the countries. Non-formal providers often fall outside QA and monitoring mechanisms (Bosnia and Herzegovina, Kosovo, Moldova, Montenegro), and recognition of learning outcomes is constrained by limited capacity, unharmonised or rigid procedures and low public trust. As a result, VNFIL is advancing slowly and often remains donor-driven, despite having a legal basis in nearly all of the countries.

Monitoring systems for adult learning is dependent on systematic data collection mechanisms and procedures. As mentioned, the evidence base is insufficient for comparability, oversight and support for decision-making.

7.3 Providers, provision and support services in adult learning

Provision across the region is diverse, combining public VET schools, adult education centres, private training institutes, NGOs, municipal centres, employer-based initiatives and community learning hubs. Provision is increasingly modular and progressively aligned with labour market needs, particularly in digital, green and vocational skills. Countries such as Albania, Montenegro, North Macedonia and Serbia have relatively structured provider networks, while Moldova and Ukraine show high dynamism through community-based and NGO-led provision. Bosnia and Herzegovina and Kosovo face strong territorial disparities and fragmentation, with rural areas consistently underserved.

Overall, access remains uneven, with significant gaps that affect adults in rural areas, vulnerable and low-skilled groups, older learners and those requiring second-chance education. In all countries (although less in Serbia), adult learning provision only partially responds to the diverse needs of learners, reflecting uneven territorial coverage and insufficient support services. The latter include outreach, career guidance (CG), VNFIL, information services and ALMP linkages. Support services are improving but are not yet systemic. Albania, Kosovo and Serbia demonstrate stronger CG ecosystems, while Montenegro and North Macedonia have introduced professional standards for counsellors. Support services in Bosnia and Herzegovina, Kosovo and Moldova remain largely project-based and fragmented. In most of the countries, VNFIL exists but is underused, with uptake restricted due to low awareness, complexity, financial reasons and limited practitioner capacity. Overall, support services partially underpin adult learning but require stronger institutionalisation, territorial coverage and sustainability.

Non-formal learning is expanding across the region and often provides flexible and responsive learning opportunities. However, non-formal providers are frequently excluded from recognition, quality assurance and funding mechanisms, while links to national qualifications frameworks and validation arrangements are often not granted. Civic, personal and community learning are significantly under-developed, limiting the breadth of lifelong learning. Considering these restrictions, in most cases, non-formal learning is undervalued and learners are unable to use it as an opportunity to progress. Networked providers show stronger coordination and capacity to have their contribution to employability and lifelong learning acknowledged. At this stage, mechanisms for co-creation seem absent and the benefits of integrating non-formal actors into AL systems governance appears underestimated. Worth noting are the councils of vocational and adult education in North Macedonia and Serbia, although these bodies miss out on full representation of the provision of non-formal learning and are confined to an advisory role.

While the analysis focuses on skills development and alignment between provision and labour-market needs, the findings also point to a related challenge: the under-utilisation of skills in employment. Adult learning can contribute not only to acquiring new skills, but also to improving how existing skills are deployed and developed at work, including through workplace learning, job redesign and employer engagement. Addressing skills mismatches therefore requires attention not only to supply and participation, but also to the conditions under which skills are effectively used.

A further cross-cutting challenge identified in the analysis concerns the prevalence of project-based, small-scale adult learning interventions, often supported by international partners and donors. While such initiatives play an important role in piloting innovation and maintaining provision in under-resourced contexts, their cumulative impact is frequently constrained by limited scale, short time horizons and weak integration into national systems. The findings point to the need for stronger coordination of the donor community and closer alignment of externally supported initiatives with national adult learning strategies, governance arrangements and financing frameworks in order to enhance sustainability and system-level impact.

8. THE WAY FORWARD FOR ADULT LEARNING SYSTEMS

Participation in adult learning and the quality thereof have been rising in the EU enlargement area and show perspectives for further advancement. The ETF analysis highlights the fact that to unlock potential progress in adult learning, the focus should be on the system dimension. This final chapter outlines cross-cutting policy priorities that emerge from the comparative analysis to provide direction for reforms of ALS and policy dialogue in the region, rather than country-specific recommendations. Nevertheless, given the diversity of institutional arrangements and reform trajectories, the priorities identified below should be interpreted in the light of each country's specific strengths, challenges and state of play that can be found in the individual country factsheets (European Training Foundation, 2026a-h). In addition, the ETF paper on a conceptual framework for adult learning systems and their governance (European Training Foundation, 2026) identifies a set of enabling conditions that can shape ALS dynamics in ways that are specific to each national context across four interconnected dimensions: (i) legal frameworks, (ii) strategic planning, (iii) institutional arrangements and (iv) financing mechanisms.

Some recommendations refer to short-term actionable steps that can improve implementation within current institutional arrangements, such as adopting pending bylaws, improving interinstitutional coordination and non-state actor consultation, strengthening data collection and setting indicators for monitoring, and expanding guidance and outreach services. Other recommended actions are likely to deploy effects in the longer-term, but it is equally advisable not to delay them with a view to increased coherence and sustainability of ALS. These recommendations relate to inclusive governance, financing, quality assurance and the integration of formal and non-formal learning pathways. The identification of short- versus long-term priorities depends on the specific country context; at the same time, decision-making may be informed by regional policy dialogue as well as bilateral or multilateral peer learning.

Strategies, legislation and policies

1. Coherence of adult learning systems

a. Strategies should be linked to medium- and long-term planning. In countries that have outdated or no adult learning strategies, these should be developed, integrated and/or updated and embedded into or linked to lifelong learning; strategic planning should be implemented in all countries.

b. Legislation should clearly target adult learning; thus, dispersion across multiple laws should ideally be reduced. Although dedicated, unified laws in this area are rare in the EU enlargement countries and beyond and should not be seen

as an obligation, they offer the possibility of a simplified legal basis and a more convenient reference for states and state actors, public and semi-public agencies, providers and, not least, the users themselves.

c. Adult learning as defined in legislation should reflect a holistic, multi-purpose vision that is not confined to a skills-for-labour approach. Comprehensive definitions offer a stronger foundation for multi-actor and multi-level systems that can develop diversified offers and opportunities for all learners.

d. Strategies, strategic planning and legislation should be aligned to increase the coherence of ALS. Coherent systems permit greater efficiency in resource allocation and are more easily navigable; in particular, they make it easier to implement policy, identify gaps and make adjustments when new needs arise.

e. Diversity in AL policies is desirable in that it permits diverse needs and life circumstances to be addressed; however, it brings with it a risk of fragmentation that should be mitigated. Stakeholders should assess the degree of fragmentation in their respective systems and its consequences for the quantity and quality of participation in adult learning. Such self-assessment can be an appropriate way to ensure that countries reflect on more finely identified policy and remedial actions.

2. Role of the EU's AL frameworks

a. Alignment of national adult learning strategies with EU frameworks such as the Union of Skills ensures coherence with a view to accession. The latter framework advocates improving coherence across formal and non-formal adult learning, higher education, employment and social policies to create a continuum that increases attractiveness and facilitates participation.

b. Strategy and policy implementation are underpinned by effective data collection, realistic targets in line with strategic objectives, and progress indicators. ALS should be equipped with information systems that enable monitoring of the evolution, quality and equity of participation in AL. The aforementioned EU frameworks also set priorities and indicators for AL that may be used for international-level analysis and for designing country-specific roadmaps.

3. Secondary legislation enables operationalisation

a. Implementing regulations are crucial in translating strategies and laws into implementation. Strategic and legal frameworks set goals and specific objectives, definitions and priority targets, and delineate types of governance with leadership, decision-making and advisory roles, thereby fostering accountability. Secondary legislation establishes the necessary provisions for implementing the principles identified, activating new services, attributing responsibilities at national and sub-national levels of government and establishing procedures for mobilising financial resources. Finalising secondary legislation often means removing obstacles to provider accreditation, VNFIL implementation and the functioning of AL councils, inter alia, and enables concrete implementation of reforms and innovations in ALS.

Governance, financing and quality assurance

1. Institutionalisation of actor coordination, information flows and decision processes across the policy cycle

a. Interministerial coordination should adequately address the cross-sectoral nature and lifelong orientation of adult learning. Formal coordination matters for all ministerial policies must be guided by the same strategic framework for AL, decisions regarding updates or reforms of existing policies, and efficient use of the state budget. For policy-related decisions, mechanisms can be established at high level through an intergovernmental body chaired by the ministry with major responsibility for AL. At a technical level, AL reference persons in each ministry and representatives of adult education bodies can ensure that there is adequate coverage of all population groups and work together to prevent duplication, assess data and qualitative evidence such as policy evaluations, draft secondary legislation, liaise with sub-national authorities and address other relevant issues.

b. State and non-State actors should collaborate to ensure that the diversity of adult learning and learners is represented. Inclusive governance is advisable in AL in order to give a voice to public, private and civic stakeholders, associations, employers and their organisations, trade unions, formal and non-formal provision, support services, analysts and data providers, and to collect feedback about policy impact and future-oriented proposals. Adult learning councils can play this crucial role, as is already the case in both the EU and the EU enlargement area and it can be further developed. Institutionalised multi-stakeholder coordination can improve implementation, accelerate the identification of obstacles to access and participation, anticipate emerging needs and facilitate learning from available evidence and evaluations to inform updates to existing policies as well as the launch of new ones, where necessary.

c. Local coordination mechanisms involving a wide range of stakeholders can bring policies closer to learners' needs. Local-level councils or partnerships formed by local authorities, development agencies, innovation and smart specialisation hubs, social partners, other relevant employers and worker organisations, large companies' representatives, CSOs, employment offices and provider associations, etc. should monitor participation and quality as well as anticipate new trends in formal and non-formal learning opportunities that might require action. These or similar local-level structures should have procedures, expertise and resources to operate regularly, and should provide relevant actors with local, more granular data about access and quality to complement national statistics. Furthermore, they should formulate proposals for new learning content, local-level supply and demand side incentives if needed, and for optimising coordination of demand and supply. Local-level funding should be enabled for AL, for example through local levy schemes, training funds and so on.

d. The above-mentioned AL information system should cover both formal and non-formal learning and be supported by institutional capacity. Collecting and managing

quantitative and qualitative data is an essential element of ALS and requires the engagement of statistical offices, expert organisations or observatories in order to make intelligent information available to various users and audiences and to the general public. Good governance implies that national statistics and other quantitative and qualitative evidence should be regularly generated and, where needed, improved to track progress and support all stages of the policy cycle, i.e. planning, financing, implementation with monitoring, and evaluation.

e. Information systems offer a solid basis for taking decisions or advising interministerial coordination bodies and multistakeholder councils at national and local level, regarding changes or reforms in AL. Independent CSOs often have the capacity to collect and analyse qualitative data, which is a beneficial complement to regular data collection and surveys and can offer an insight into areas or population groups that might be outside the scope of national and local statistics. Monitoring and evaluation not only supports policy, it can also inform improvements to programmes at both national and local level.

f. National authorities and international partners should strengthen their coordination to reduce reliance on fragmented, short-term adult learning projects and ensure that externally funded interventions are aligned with national strategies, governance structures and sustainable financing mechanisms.

2. Ensuring sustainable and equitable financing

a. Sustainable systemic financing mechanisms should be ensured for adult learning, to reduce dependence on short-term project funding. Introducing multi-annual financing for adult learning, with stable dedicated budget lines decoupled from general education budget lines, would increase the transparency of allocations and improve monitoring of spending.

b. AL financing should be adequately dimensioned to cater for all aspects of learning and all system components. AL serves personal development, social cohesion, economic competitiveness, smart specialisation strategies, employment and company performance, as well as the green and digital transitions. In line with this, the spectrum of provision and support services in AL is wide and necessitates capacities, the promotion of a lifelong learning culture and incentives on both the demand and supply sides. Good governance demands that financing be matched with accountability mechanisms.

c. Financing partnerships should be envisaged that take into account the breadth of purpose and growing needs of AL. Public expenditure is usually directed towards public providers of training and other services and demand-side incentives. The latter typically take the form of tax benefits, training funds and levy schemes for employers; and vouchers, free access, co-financing, fund matching and facilitated loan conditions for learners.

d. Financing mechanisms should be mixed with non-financial incentives to reduce barriers to access. Limited financial resources are a relevant but not exclusive

impediment to participation in AL; therefore, incentives should be both financial and non-financial and be particularly targeted at population groups experiencing disadvantage or temporary adversity. These might include unemployed adults, young adults in difficult transition situations, people living in remote or under-served areas and low-income learners, for example.

3. Expansion of quality assurance

a. Quality assurance (QA) should cover both formal and non-formal learning as equally legitimate lifelong learning modalities. Adults tend to prefer non-formal learning and find it more accessible; therefore minimum standards of quality should be guaranteed for this pathway. Quality assurance can help adults make informed choices about which courses and providers they can trust. There are various models for extending QA to non-formal learning, depending on context, legislation and practice. Designing the appropriate QA model for non-formal learning in a given context means striking a balance between ensuring QA for the AL training provision, which may be a lengthy process, and maintaining the flexibility needed to accommodate the fast pace of course updates and the diversity of learning opportunities.

b. Formal vocational education and training for adults usually refers to a national qualifications framework (NQF), which may cater to both formal and non-formal qualifications and micro-credentials. Comprehensive NQFs that institutionalise non-formal qualifications can offer flexibility and stimulate participation in adult learning. This institutionalisation can offer better monitoring of both the type and the outcomes of participation in learning. It can also open non-formal and informal learning to validation; however, care must be taken to avoid over-regulation of AL participation.

Provision, demand and support services

1. A good match between provision and demand through relevance, breadth and inclusion

a. The quality of AL can be further strengthened, over and above provider accreditation procedures, through the development of adult educator competence profiles, Moreover, these support the integration of non-formal learning into ALS, thereby reinforcing the system's lifelong learning orientation.

b. The design of targeted support for learning in micro and small companies can significantly increase AL participation. Companies of small or very small size represent the bulk of the economies in the region but are less inclined than large companies to invest in staff training due to a mix of financial and non-financial constraints. Incentives to mitigate this diversity of challenges should address financial issues, leave days for training, granular needs assessments, anticipation of skills needs and apprenticeships for adults.

c. Social dialogue should be preferred as a mechanism for identifying and negotiating suitable incentives and their management, using the available evidence. Besides skills formation, the effective use of adults' existing skills in their jobs should be promoted. Encouraging workplace learning should be part and parcel of employer engagement and advocating for organisational practices that support the development of existing skills.

d. Incentives on the demand side should encourage individual learners to support their own choice of content and type of learning. Training voucher schemes are a relatively common practice whose diverse applications are documented. Incentives to participate also include simplified, low-barrier access to training and related services, dedicated information campaigns, subsidised leave for training and individual learning accounts (ILAs).

e. Equal legitimation of formal, non-formal, work-oriented and personal development-oriented learning is advantageous for individuals and society; therefore, comparable attention should be paid to different purposes of learning. Policy choices imply prioritisation and trade-off; however, decisions regarding formal and non-formal learning provisions should move away from an 'either-or' logic and instead opt for 'and-and' approaches, in the following manner:

   (i) on the formal provision side, expand second-chance general education, partial and full qualification vocational pathways linked to NQF levels, while opening up opportunities for permeability and avoiding over-regulation liable to undermine flexibility in upskilling and reskilling;

   (ii) on the non-formal provision side, enhance opportunities for personal development and to enhance digital, green, transversal and civic competences by enlarging the network of providers to include companies, civil society organisations, community centres, popular universities and universities of the third age; to address gaps in rural areas, mobile provision can be supported by local authorities and agencies, while other tailored outreach strategies can be devised to increase the inclusion of adults who are demotivated or in situations of vulnerability.

2. Institutionalisation and deployment of support services

a. Support services should be integrated and institutionalised through governance mechanisms aimed at coordinating various stakeholders and levels, building capacity in organisational learning and improvement and securing sustainable financing and nationwide territorial coverage. Needs assessments, mapping, outreach, lifelong career guidance, validation, information about adult learning opportunities and other services should not be proposed in isolation but through recognisable and easy-to-access entry points. The development of digital infrastructure can offer invaluable support to make such services available widely through public and private networks.

b. Organisations that operate close to adults and understand the diversity of their needs could be involved in co-designing the services. This has implications in terms of procurement but is worth considering. The first step in co-design could be an experimental phase involving providers of services such as needs analysis, outreach, lifelong career guidance and VNFIL, in order to be able to assess the process and outcomes before wider application of the co-design method.

c. The institutionalisation of services should aim at country-wide offers of services to all adult learners, with targeted services for vulnerable and underrepresented groups. Full-scale outreach and lifelong career guidance, counselling, VNFIL, information and promotion of a lifelong learning culture across geographical areas and sectors all require defined roles and responsibilities, adequate financing, clear procedures, capacity-building and awareness campaigns.

ANNEX – ANALYTICAL FRAMEWORK AND GUIDING QUESTIONS OF THE MAPPING EXERCISE IN THE EU ENLARGEMENT AREA

Chapters	Guiding questions [1]	Sources/ methods
Introduction ▪ Country context (characteristics of governmental and administrative approach to education and training affairs, primary legal frameworks, placement of the adult learning sub-sector within the wider education and training system) ▪ Specific elements relating to the country's political situation, constitutional arrangements, territorial/ regional autonomies and jurisdiction over the education sector ▪ Presentation of the country paper structure and objectives		Desk review

Chapters	Guiding questions [1]	Sources/ methods
Chapter 1. Adult learning strategies and policies ▪ National and regional AL strategies (existing, past and present, or under preparation with expectation to be adopted) – approach to AL (broad, narrow), primary strategic objectives, results obtained to date and targets to be achieved, comparative analysis of alignment with EU policy priorities; existing legal framework; level of priority attributed to AL, plans for reforms or large-scale programmes) ▪ National AL policies (overview of the main policy objectives, national and regional policy measures implemented or under implementation; target population; identification of equity and inclusiveness gaps; sources of funding; stakeholder participation; monitoring and evaluation mechanisms) ▪ National targets vs EU targets (analysis of the five key indicators of NEAAL and UoSkills 2030 at national level, plus indicators relating to AL from Growth Plans/ National Reform Agendas)	1. What are the main priorities of existing AL national/regional strategies? Where do they intend to bring AL in the country? Currently, is AL a priority? Does the government intend to advance AL? Do social partners and/or other non-state actors advocate for progress in AL? 2. Is the legal framework adjusted to national/ regional strategies and policy objectives? Do these strategies and objectives correspond to the specific needs of the regions? Is there mismatching between the various levels of policy definition (fully aligned/partially aligned/not aligned at all)? 3. What is the level of fragmentation of AL policies within the wider education and training system of the country (highly fragmented/fragmented/not so fragmented)? 4. What are the main indicators in use and related targets for the AL sector (e.g. participation rates, skill levels, employment outcomes)? 5. Where relevant and possible, compare available indicators with EU policy objectives in the NEAAL 2030 and the Communication on the Union of Skills, as well as benchmarking indicators and other national targets. 6. (full match/partial match/no match at all)	Desk-review Interviews Data Analysis

Chapters	Guiding questions [1]	Sources/ methods
Chapter 2. AL institutional arrangements and governance ▪ Institutional arrangements (responsible institutions at national and regional levels; roles and responsibilities; coordination bodies, type of providers (public/ private/other); coverage of the territory and gaps in AL supply and demand; participation of employers and other players from the world of work; funding sources and financing models) ▪ AL governance models (key features of the governance model, i.e. centralised/decentralised, participative, co-decision (diversity of actors, autonomy of the providers), supervision and coordination processes, relation to NQFs) ▪ Monitoring and quality assurance, data collection and analysis of AL, including evaluation.	7. Which institutions are responsible for the coordination and implementation of AL policies and how are roles and responsibilities divided among ministries, agencies, and other relevant actors? Which coordination mechanisms are in place (e.g. AL Council, Interministerial Committee on AL, Economic and Social Council, etc.) and what are their roles (i.e. advisory, consultative, decision-making)? 8. What are the main sources of funding for AL provision? Are there public-private partnerships relating to AL funding, e.g. Training Funds, Tax exemptions, Levies, etc? Are the financing model and the funding sources sufficient and adequate (very adequate/moderately adequate/not adequate at all)? 9. Which stakeholders (for example, employers, trade unions, civil society, learners) are involved in the planning, design, implementation and monitoring of AL initiatives and to what extent is there wide participation by relevant players in the different areas of AL governance (high diversity of stakeholders/somewhat diverse/not diverse at all)? 10. How well coordinated is the management of AL policy implementation as per the country's institutional arrangements? Does it correspond to the adopted legal frameworks and do they correspond to a more centralised or decentralised model (very centralised/centralised to a certain extent/decentralised)? 11. How far are the recognition, portability and integration of AL outcomes/qualifications integrated into/linked to national qualification frameworks/national qualification systems (fully integrated/ integrated to a certain extent/not integrated at all)? 12. What mechanisms are in place (at national/ regional/provider level) to ensure the quality of AL provision? How are the results monitored and what type of programmes are covered (fully covered/to a certain extent/not covered at all)? How is the quality of trainers/facilitators ensured?	Desk-review Interviews

Chapters	Guiding questions [1]	Sources/ methods
Chapter 3. AL provision ▪ AL Programmes (main existing formal and non-formal programmes, complementary services such as outreach, coaching, career guidance and validation of skills including the broader range of learners, objectives and relation to upskilling and reskilling initiatives, types of provision, recent initiatives in the AL domain for specific target groups, skills acquisition) ▪ AL Provision (size of the provision, number of learners enrolled, completion of the programmes)	13. What types of AL programmes are currently available (formal and non-formal), and what are their primary objectives and target groups? To what extent does the AL provision match the needs of different groups of adult learners by addressing the issues of diversity, equity and inclusion (full match/partial match/no match at all)? 14. Who are the current providers of AL and are there significant differences between formal and non-formal provision? How attractive are the existing programmes (formal and non-formal – highly attractive/moderately attractive/not attractive at all)? Are there significant gaps in AL provision?	Desk-review Interviews Statistical data analysis
Conclusions ▪ Main findings ▪ Main successes, what is working well, as well as challenges identified at each level (Chapters 1, 2, 3) ▪ Specificities of AL findings, perspectives on AL, source of policy learning. ▪ 1 to max 3 conclusions to be highlighted.	15. Identify the main findings in each of the three dimensions. 16. Specify what indicates progress (for example, a new law under preparation, more funding for AL, the government calling non-state actors to mobilise and contribute to AL, or very successful programmes). 17. What older challenges remain and what challenges are emerging? 18. Do the findings in 1, 2 and 3 support the study assumption that AL is recognised as a priority and is there progress? 19. What are the sources of 'policy learning' (who is a source of inspiration: neighbours, EU countries, international practices, etc.)	Expert's own analysis based on key qualitative and quantitative information collected through desk research and interviews

[1] These guiding questions were used as a checklist for the authors of the country factsheets, notably to draft the Conclusions boxes of each Chapter 'X' 'State of play' section (ETF, 2026a-h).

ACRONYMS AND ABBREVIATIONS

AEC	Adult education centre
AES	Adult education survey
AL	Adult learning
ALMP	Active labour market policies
ALS	Adult learning systems
ANACEC	National Agency for Quality Assurance in Education and Research (Moldova)
ANOFM	National Agency for Employment (Moldova)
APAE	Action Plan for Adult Education (Serbia)
APOSO	Agency for Preschool, Primary and Secondary Education (Bosnia and Herzegovina)
AQAPE	Agency for Quality Assurance in PreUniversity Education (Albania)
AQF	Albanian Qualifications Framework
AVETAE	Agency for Vocational Education and Training and Adult Education (Kosovo)
BD	Brčko District
BiH	Bosnia and Herzegovina
BiHQF	Bosnia and Herzegovina Qualifications Framework
CCI	Chamber of Commerce and Industry
CCIS	Chamber of Commerce and Industry of Serbia
CEA	Centre for Adult Education (North Macedonia)
CGC	Career guidance and counselling
CMS	Career management skills
CoVEs	Centres of vocational excellence
CPD	Continuous professional development
CVET	Continuing vocational education and training
DVV	Deutscher VolkshochschulVerband (German Adult Education Association)
EAAL	European Agenda for Adult Learning
EMIS	Education management information system

EPALE	Electronic Platform for Adult Learning in Europe
EPRD	Office for Economic Policy and Regional Development
ESG	Environmental, Social, and Governance
ETF	European Training Foundation
EU	European Union
Euroguidance	European Guidance Network
Europass	European Skills Passport
FBAE	Functional basic adult education
FBiH	Federation of Bosnia and Herzegovina
GRALE	Global Report on Adult Learning and Education
HE	Higher education
ICT	Information and communication technology
IEQE	Institute for Education Quality Evaluation (Serbia)
IIE	Institute for Improvement of Education (Serbia)
ISKOOM	Information System for Quality Assurance in Education (Bosnia and Herzegovina)
KESP	Kosovo Education Strategic Plan
LAE	Law on Adult Education
LFS	Labour force survey
LLL	Lifelong learning
LNQFS	Law on National Qualifications Framework System (Serbia)
MEDD	Ministry of Economic Development and Digitalization (Moldova)
MECR	Ministry of Education and Research (Moldova)
MESTI	Ministry of Education, Science, Technology and Innovation (Kosovo)
MLSP	Ministry of Labour and Social Protection (Moldova)
MoCA	Ministry of Civil Affairs (Bosnia and Herzegovina)
MoE	Ministry of Education
MoECI	Ministry of Education, Culture and Innovation (Albania)
MoES	Ministry of Education and Science
MoSTD	Ministry of Science, Technology and Development (Serbia)

MSME	Micro, small and medium-sized enterprises
NAES	National Agency for Employment and Skills (Albania)
NAVETQ	National Agency for Vocational Education and Training and Qualifications (Albania)
NAQA	National Agency for Quality Assurance
NEAAL	New European Agenda for Adult Learning
NEETs	Not in education, employment or training
NES	National Employment Service (Serbia)
NESS	National Employment and Skills Strategy (Albania)
NGO	Nongovernmental organisation
NQA	National Qualifications Authority
NQF	National Qualifications Framework
NQFS	National Qualifications Framework System
NQS	National Qualifications System
OECD	Organisation for Economic Cooperation and Development
PD	Professional development
PES	Public employment service
PPP	Public–private partnership
PROAE	Programme for Adult Education (Serbia)
QCs	Qualification centres
QA	Quality assurance
RoAPAE	Report on Action Plan for Adult Education (Serbia)
RS	Republika Srpska
RTC	Regional training centre
RVETCs	Regional vocational education and training centres
SDES	Strategy for Development of Education in Serbia
SES	State Employment Service (Ukraine)
SME	Small and mediumsized enterprises
SORS	Statistical Office of the Republic of Serbia
SSEQ	State Service for Education Quality

STEM	Science, technology, engineering and mathematics
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNSCR	United Nations Security Council Resolution
UoSkills	Union of Skills
VET	Vocational education and training
VNFIL	Validation of nonformal and informal learning
VTC	Vocational training centre
WBL	Workbased learning
YALEC	Youth and adult learning and education centres

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