

Evaluation of the ETF actions on the reform of qualifications systems in partner countries

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Abbreviations

ADA	Austrian Development Agency
AQRF	ASEAN Qualifications Reference Framework
BC	British Council
Cedefop	Centre Européen pour le Développement de la Formation Professionnelle (European Centre for the Development of Vocational Training)
CMO	Context-Mechanism-Outcome
CNL	Creating New Learning
DG EMPL	DG Employment, Social Affairs & Inclusion
EaP	Eastern Partnership
EBRD	European Bank for Reconstruction and Development
EC	European Commission
EEP	Eastern European Partnership
EQF	European Qualifications Framework
EQF AG	EQF Advisory Group
ETF	European Training Foundation
EU	European Union
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
HCD	Human Capital Development
HE	Higher Education
IAG-TVET	Interagency Group on Technical and Vocational Education and Training
ILO	International Labour Organization
KQF	Kosovo's Qualifications Framework
LuxDev	Luxembourg Agency for Development and Cooperation
MS	Member State
NGO	Non-governmental organisation
NMQF	North Macedonian Qualifications Framework
NQA	National Qualifications Authority
NQF	National Qualifications Framework
OECD	Organisation for Economic Cooperation and Development
PLA	Peer Learning Activity
QA	quality assurance
QF-EHEA	Qualifications Framework in the European Higher Education Area
RPL	Recognition of prior learning
RQF	Regional Qualifications Frameworks
SDC	Swiss Agency for Development and Cooperation
SEET	South Eastern Europe and Turkey
SEMED	Southern and Eastern Mediterranean
SP	Strategic Project
SQF	Sectoral Qualifications Framework
TOR	Terms of Reference
TVET	Technical and vocational education and training
UNESCO	United Nations Educational, Scientific and Cultural Organization
USAID	United States Agency for International Development
VET	Vocational education and training
VNFIL	validation of non-formal and informal learning
WB	World Bank
WBL	Work-based learning
WRL	World Reference Levels

Summary

This study has the objective of assessing the effectiveness and impact of the ETF actions on the reform of qualifications systems in partner countries during the period 2014-2019. This phase is characterised by the following approaches and changes:

- From **January 2015 to December 2018**, the **Strategic Project 'Qualifications and Qualification Systems'** had a dedicated budget for qualifications and covered a range of in-depth work in partner countries, as well as cooperation activities with the global community (particularly Cedefop and UNESCO).
- Following 2017, a reflection and restructuring process at corporate level led to a complete **change in operations at the beginning of 2019**. A **thematic approach** was adopted with some transversal projects that are broader, cover thematic areas, and integrate the qualifications topic. However, single-theme projects or groups of activities were also continued.
- Another change process is being initiated through the **new ETF Strategy 2027**. In the coming years, the ETF is planning to focus their operational mobilities on the following three pillars: policy advice; diagnosis and assessment (and monitoring); knowledge hub.

This external evaluation looked at the evolution of the ETFs approach and has both a summative and formative (forward-looking) component. The evaluation was conducted between January and May 2020 and used a mixed methods approach, including review and analysis of documents, interviews with ETF staff members and representatives of other organisations, an online survey amongst stakeholders and beneficiaries in ETF partner countries as well as representatives of international organisations, and country case studies (Ukraine, North Macedonia, Kosovo). Furthermore, the preliminary results were discussed with the Qualifications team September 11, 2020.

Conclusions

The evaluation resulted in the following conclusions:

- Conclusion 1 on the effectiveness of ETFs work on qualifications: **ETF interventions had an impact on the development of partner countries' mechanisms, frameworks and processes for implementing reforms of qualifications systems. While each type of ETF action had its contribution and perceived added value, it is in the combination of ETF actions that impact is reached: strengthening stakeholders' capacities and providing knowledge, insights and advice based on practically-grounded international comparative analysis and tool development, within a cooperation context. For the future, the perspective of the end-user could be better integrated into ETFs work and new modalities should be explored more to actively engage stakeholders through cost-effective means (such as webinars, online workshops etc.).**
- Conclusion 2 on connecting partner countries to international developments: **ETF is widely viewed as knowledge resource on qualifications systems reforms and is viewed as a trusted partner connecting stakeholders in the partner countries with international / European developments. For the future, within the new positioning of the qualifications team, the qualifications work can be linked more strongly to other international developments in which qualifications play a facilitating role (for instance, social dialogue, work-based learning).**
- Conclusion 3 on ETFs role in the international arena on qualifications: **ETF is well connected with the international arena on qualifications, in particular through the cooperation with the European Commission, Cedefop and UNESCO and its own network of experts and organisations, including national and regional qualifications bodies, and online platforms. It is especially renowned for its hands-on understanding of developing**

qualifications systems and reforms and less known for its more theoretical or analytical work and identification of new themes. For the future, ETF could increase its future-topic orientation and further develop the Open Space platform as part of the knowledge-hub approach.

- Conclusion 4 on synergies between ETF and EU-funded and other donor-supported initiatives: **ETFs work is complementary to the work of other partners and often leads to synergies. ETF vis-à-vis other partners has a specific and highly valued role to play. ETFs involvement with EU-funded initiatives also allows ETF to go beyond working in the partner countries (for instance in Africa). For the future, when working closely together on EU-funded programmes or with EU Delegations, further clarifications on the role of the ETF in relation to them are required.**
- Conclusion 5 on the use of the context, mechanism outcome (CMO) approach: **The CMO approach was valued for rationalising ETFs support in specific context and bringing together the outcomes of different ETF interventions. However, as a planning approach it is rather heavy and time consuming. For the future, general monitoring on qualifications systems development could be covered by existing initiatives (Torino process), while an approach to more in-depth assessment could be developed on the basis of the CMO experiences.**

Recommendations

Based on the evaluation findings and conclusions, the following recommendations are developed:

- **Recommendation A: Mainstream qualifications work throughout all ETF work and establish closer links with other themes (such as social dialogue, work-based learning, lifelong learning), as the qualifications work forms the basis for good governance, quality delivery and robust skills anticipation systems.**
- **Recommendation B: Maintain diverse types of activities and find new modes of working on qualifications in the countries, covering policy advice, diagnostics, and knowledge hub activities, and link them closely to ensure synergies and mutual enforcement of effectiveness.**
- **Recommendation C: Strengthen the ETFs capacity to be a forerunner and the global go-to-place for qualifications-related work, both in terms of experience in developing, implementing and renewing qualifications (and qualifications systems); and in identifying and analysing emerging trends and developments, particularly in the context of the COVID-19 pandemic.**
- **Recommendation D: Develop guidelines on how ETF can be involved in the work of EU Delegations and in EU-funded programmes. These guidelines should identify different options ranging from providing technical assistance to external monitoring and evaluation.**
- **Recommendation E: Provide targeted monitoring services to countries where ETF works directly on qualifications (through policy advice or in EU-funded programmes) and reduce the resources used for general monitoring of all partner countries' NQF developments.**

Action points

In implementing these recommendations, the following structures need to be put in place:

An ETF organisational model that ensures a culture of strong coordination and cooperation across different themes and services, allowing experts to focus on the areas where they add most value.

Without being able to say exactly how the work of the qualifications team is embedded in the ETF organisation in the future, it is clear that the issue of qualifications should be integrated into

all (or most) areas of ETF activity and covered by all three services (knowledge hub, policy advice and monitoring and evaluation). As concluded, the ETF is the most effective at facilitating change through the totality of its activities (including specific country work).

It seems most appropriate that the focus of the team working on qualifications will be on the knowledge hub service (or better, serving as centre of expertise). In this context, it is essential that other ETF teams, services and activity areas are well aware of the (potential) contribution of qualifications work for their services to the partner countries. This relates to ensuring that ETFs work on policy advice and on monitoring and assessment significantly takes into account insights from the qualifications work; but also that other activity areas (lifelong learning, career guidance, enterprise skills development, skills anticipation, work-based learning etc.) are able to take on board expertise and insights from the qualifications team. Furthermore, the qualifications team should pro-actively establish thematic links between qualifications and other activity areas in identifying emerging trends and developments.

An ETF human resource strategy that ensures continuity in staffing and creativity.

Maintaining the expertise of the ETF team working on qualifications system reforms is a crucial aspect in ensuring that the investment to date will not disappear. This is very important with regards to the generational change that will affect the team in the new programming period. This should be addressed by the development of a strategy for the work within the qualifications team as well as a broader human resource strategy across the thematic projects. This strategy should also ensure that the institutional expertise related to the specific qualifications' topic does not get lost and that expertise for the broader thematic approach can be developed. Moreover, it should ensure that the necessary capacity for creativity and innovation can be improved. This should be further supported by appropriate organisational structures for ensuring that the ETF is sufficiently flexible and agile when addressing emerging issues.

An approach to identify emerging trends and development and responses to COVID-19 and to maintain a global leader position in qualifications.

In order to maintain the position of a global centre of expertise on qualifications, ETF needs to strengthen its ability to develop insights in emerging trends and developments that in a practice-oriented manner inform stakeholders in the countries. This is especially valid in the context of the current COVID-19 pandemic where countries seek assistance and guidance in how to adapt their skills development systems to the new environment. The approach to identify topics and develop insights in emerging trends and developments should include the following aspects:

- Devote team-members' time to investigate specific emerging topics and draft opinion pieces or other deliverables that stimulate debate and position the ETF as a thought leader when it comes to knowing what developments will be important for partner countries.
- Establish discussion fora for stakeholders on emergent and relevant trends on the Open Space platform to learn from the qualifications community which aspects they consider interesting to explore.
- Publish the results of the various ETF actions at national, regional and international level (in various forms, including Open Space) and highlight the qualifications aspects in publications on other issues.

An ETF approach (guideline) for working with EU Delegations or EU/MS programmes and projects.

To clarify ETFs role in working with EU Delegations and EU/MS programmes and projects, the ETF could develop an overall approach defining different modalities of engagement and their

respective consequences in terms of cooperation arrangements; governance; reporting and communication. Broadly speaking, three modalities could be explored:

- Modality 1: ETF is involved as a critical friend of the EU Delegation or the EU/MS programme; it contributes to programme/project design and functions as broker between programmes/projects and national stakeholders.
- Modality 2: ETF is responsible for the monitoring and assessment of the implementation of the programme or project, for mapping the current state and also the progress of development.
- Modality 3: ETF joins the implementation and is responsible for a specific set of activities or services.

A two-pronged approach to monitoring: regular collection of general information and in-depth monitoring and assessment.

General level monitoring at the level of the implementation of qualifications systems is already integrated into the overall monitoring of countries' progress with regard to skills development systems (Torino Process). In addition to this monitoring at general level, a more targeted monitoring and assessment approach should be developed to assist countries (or EU Delegations, programmes and projects) – on request – to critically assess the state of development of their qualifications systems, to map the progress achieved and finally to propose the way forward. This monitoring and assessment approach could be inspired by the tried and tested CMO approach and include country self-assessment, data analysis and additional interviews.

1. Objective of the evaluation and evaluation approach

1.1 Objective of the evaluation and evaluation questions

This evaluation **aims to assess the effectiveness and impact of the ETF actions on the reform of qualifications systems in partner countries during the period 2014-2019**. The scope of this study therefore covers the achievements of ETF, the dynamics between national and international qualifications systems, and coordination with other international organisations. This evaluation looks at the evolution of the ETFs approach and has both a summative and formative component. The evaluation examines whether the applied CMO approach (Context-Mechanism-Outcome) had value as a planning instrument (part 1, Chapter 2.5). Furthermore, the evaluation mainly looks back at how the ETFs work on qualifications has functioned in practice and whether there are indications that the intended results have been achieved or whether there are already signals that some operating modalities do not work as envisaged (part 2, Chapter 3). The formative component looks at how ETFs work on qualifications could be positioned within a changing institutional and societal context (part 3, Chapter 4). Finally, the evaluation contains evidence-based conclusions and recommendations to be taken on board in the near future in future qualifications work (part 4, Chapter 5). The box below presents the evaluation questions (and sub-questions) related to the different parts.

Part 1: Evaluation questions reflecting on ETFs approach

- **Q1: Assess the evolution of the ETF work on qualifications by taking stock of the use of the CMO approach.**
 - Is the CMO approach clearly defined and disseminated for ETF work on qualifications?
 - What approaches have been adopted by ETF qualifications team members and country coordinators to support the CMO approach since 2014?
 - To what extent are formalised structures, frameworks and tools in place to support the use of the CMO approach?
 - Is the CMO approach applied consistently across the ETF?
 - Has the CMO approach supported successful achievement of planned outcomes?
 - Is there any evidence of changes in ETFs work on qualifications following the use of the CMO approach?

Part 2: Evaluation questions summative component:

Effectiveness:

- **Q2: How effective has the ETF been in developing and applying principles of qualifications systems reforms (through NQFs) and operationalising these principles in the partner countries? How did the ETF influence the qualifications systems reforms in the country?**
 - Which ETF actions aim at the development and application of the principles of qualifications systems reforms through NQFs?
 - Which ETF actions aim to operationalise these principles in the partner countries?
 - Over the period 2014-2020, what have been the major achievements in qualifications systems reforms in the partner countries?
 - What are the real impacts of the qualifications systems reform in the partner countries?
 - To what extent did the ETF contribute to the progress in qualifications systems reforms achieved in the respective countries?
 - Are there any unintended effects of the ETF actions on qualifications systems reforms in the partner countries?
- **Q3: To what extent has the ETF effectively applied and been able to connect partner countries with international developments and experience (including the EQF) to inform their qualifications system reforms?**
 - What are the recent international trends and best practices in qualifications systems reforms?
 - Which tools and methodologies have been applied by ETF to inform the qualifications system reform in partner countries on international trends and best practices (including the EQF)?
 - To what extent do the qualifications reforms in partner countries comply with the EQF?

- To what extent do the qualifications system reforms in partner countries comply with other international trends and best practices?
- Which additional methodologies and tools could be applied by the ETF to inform the qualifications system reforms in partner countries on international trends and best practices (including the EQF)?
- **Q4: What has been the effect of the ETF work in the international arena on qualifications? How has the online platform contributed and how will the transition to Open Space further support this?**
 - What steps has ETF taken in the international area on qualifications?
 - How has the online platform contributed to the ETF work in the international arena?
 - What kind of synergies are there between the ETF work in international arena and the online platform?
 - How will the transition to Open Space support the ETF work in the international arena on qualifications?
 - What kind of synergies are there between the ETF work in international arena and the Open Space?

Coherence/coordination

- **Q5: To what extent has synergy and coordination with EU-funded and other major donor-supported (e.g. WB, GIZ) projects in the partner countries been achieved?**
 - Which other EU-funded initiatives related to the qualifications systems reforms have been implemented in the partner countries?
 - Which initiatives related to the qualifications systems reforms have been supported by other donors in the partner countries?
 - What steps have been taken by the ETF to increase the synergy and coordination with other EU-funded and other major donor-supported initiatives?
 - What synergies between the ETF actions and other EU-funded and other major donor supported projects have been identified?
 - Are there any overlaps between the ETF actions and other EU-funded and other major donor-supported initiatives?

Part 3: Evaluation questions formative component:

- **Q6: How best should the ETF shape its work and where should the ETF focus its efforts in the new context of the knowledge hub, where there is a shift away from a country-based logic to a policy advice logic and that the bulk of our country-based actions will pass through cross-country actions?**
- **Q7: How can the ETF ensure that the investments to date will not disappear with the new approach?**
 - What strategies or actions are in place to ensure investment to date will not disappear with new approach?
 - Have key risks and challenges, and associated mitigating actions, been identified and operationalised?

Part 4: Conclusions and recommendations

- **Q8: What could be concluded from the summative and formative component and what could be recommended to further develop ETFs work on qualifications?**

1.2 Methodology

The evaluation was conducted between January and May 2020. In order to answer the evaluation questions a mixed methods approach was used.

Desk research - document review and analysis

The evaluators analysed a range of documents including ETF internal documents (such as project plans or monitoring reports), studies and other material published by ETF and external organisations, and country-specific documents, in order to extract information relevant to the evaluation questions. Furthermore, a separate literature study was conducted on current global developments in the area of qualifications and qualifications frameworks. The literature used is presented in Annex 2.

Interviews with ETF staff members

A significant share of the information needed to answer the evaluation questions came from ETF staff members involved in activities related to the reform of qualifications systems in the partner countries¹. Nine semi-structured interviews were conducted online².

Interviews with representatives of other organisations

Based on the evaluation questions, tailored interview checklists were developed to guide semi-structured interviews with representatives of other international organisations that cooperate with the ETF in different ways. In total, seven online interviews were conducted. The list of organisations consulted is presented in Annex 3.

Online survey amongst stakeholders and beneficiaries in ETF partner countries as well as representatives of international organisations

The online survey was conducted to collect quantitative data and had two main aims: To map general country contexts of partner countries, progress made at national level, and the relationship with ETF work/international developments; and to obtain information on specific interventions. The survey questionnaire (see Annex 5) was structured in four main parts: Part 1: Background questions; Part 2: Mapping the Country Context; Part 3: Interventions and outcomes/impact; Part 4: Success and fail factors and lessons for the future. The questionnaire was available in English, Arabic and Russian. The survey was launched after contact details were provided by the ETF (April 1st, 2020). The total number of stakeholders invited to respond was 298. After multiple reminders were sent, 55 stakeholders responded to the invitation (as of May 10, 2020) in total. The group of respondents had the following background characteristics:

- Focus: 55% (30) of the respondents had a country focus and 45% (25) had an international focus. Those with a country focus were distributed amongst the Partner countries as follows: Albania (1); Armenia (1); Azerbaijan (2); Bosnia and Herzegovina (3); Georgia (2); Israel (1); Kosovo (3); Kyrgyzstan (3); Moldova (1); Montenegro (1); North Macedonia (2); Russia (1); Serbia (1); Turkey (1); Ukraine (7).
- Type of respondent: 25% (14) represented a Government Ministry; 24% (13) a National authority for NQF/qualifications; 20% (11) an education provider; 13% (7) an employer organisation or employer; 7% (4) an EU institution; 7% (4) an international or multi-lateral organisation; and finally, and 4% (2) represented NGOs.

The response rate was 18.5%. This is considered to be quite low given that the list included people that are well aware of ETFs work on qualifications as they participated in the Benefits for people Qualifications conference 6 November 2019. On the other hand, the total number of responses is higher than in the 2014 evaluation (44 respondents, 98 stakeholders invited). One factor that could explain the low response rate is the fact that the survey coincided with the COVID-19 outbreak and the subsequent 'Great Lockdown'. This also led to a focus on how best to continue learning and working in the education sector and in the labour market, with less attention paid to completing surveys. The results of the survey must therefore be treated with caution but at the same time provide a valuable indication how key stakeholders value ETFs work. The survey obtained responses from most of the partner countries receiving ETF support for reforming qualifications systems and there is no particular bias in terms of country-focus or international focus or the types of organisations the respondents represent.

¹ Avoiding bias in data collection: It is unrealistic for any evaluation to rule out any bias in the collection of data. Consider the possibility where people provide answers that they think the interviewer wants to hear or try to impress with a skewed answer. The methodological approach therefore ensures that each question will always be collected through multiple types of data collection or through approaching more than one type of stakeholder. Words of praise or disapproval are for example not quantifiable, or quantifiably 'valuable', and should be cross-checked (triangulated) with data obtained from other sources (such as desk research or survey data), to ensure corroboration. Where discrepancies arise, these will be investigated further by means of multiple sources.

² Originally, it had been planned to conduct interviews and possibly focus groups during a visit to the ETF. However, due to the travel restrictions during the COVID-19 crisis, all interviews were conducted online.

Country case studies

The aim of the country case studies was to gain a deeper understanding of the implementation and results of relevant qualification activities achieved in the partner countries and to reflect on progress and results with final beneficiaries of qualifications activities, such as national policy-makers, implementing institutions, and donor agency partners³. The three selected countries were **Ukraine, North Macedonia** and **Kosovo**. The selection was based on the following dimensions:

- The selected countries received **substantial support from ETF** in terms of allocated financial resources;
- The countries show a **regional diversity**: The selection covered both the East European Partnership (EEP) and Western Balkans;
- The countries show **different levels of ETF activity**: Ukraine has had a high-level of qualifications systems reforms activity over the course of the period under study in this evaluation. North Macedonia had a high level of activity in the early period of this study and currently has a low level of activity focussed on qualifications reforms while Kosovo has a recently increasing focus on qualifications systems reforms support.

The interviews with stakeholders in the countries (such as: national authorities; employers' representatives/social partners; education sector representatives; representatives of donor organisations) were preceded by extensive in-depth desk research of documents of relevant document provided by ETF and interviews with the responsible ETF country coordinators. For each of the three countries, between 27 and 49 persons were identified and contact details provided. In total 14 persons were interviewed for the case studies. The case studies were conducted between April and May 2020.

Data analysis, synthesis, recommendations and validation

After the data collection phase, the evaluators investigated the body of evidence gathered as a whole and made an overall assessment in line with the evaluation questions. Based on the conclusions, the evaluation team developed recommendations and detailed lessons learned for further support of qualifications systems reforms in the coming years. The preliminary results were discussed with the Qualifications team September 11, 2020.

³ In order to collect in-depth information for selected countries, field visits to ETF partner countries had been envisaged. Since field visits were not possible due to the travel restrictions during the COVID-19 disruptions, it was decided to prepare country case studies based on desk research and online interviews.

2. Overview of ETFs work on qualification during the period 2014-2019

2.1 ETF interventions in qualifications during the period 2014-2019

The overall objective of the ETF as described in the agency's mandate is 'to contribute, in the context of EU external relations policies, to improving human capital development'⁴. The ETF has acted for many years as a centre of expertise, a mediator, an adviser, a communicator, and an enabler of policy developments and reforms⁵, including in the area of qualifications systems. In this area, the specific objective of the ETF is 'to support countries to improve their qualifications and qualifications systems to make NQFs a tool to modernise both initial and continuing VET for lifelong learning, employability and competitiveness'⁶. During the period 2014-2019, qualifications experts at ETF developed and delivered the following broad categories of intervention to support this objective:

- A. Specific country support activities (capacity-building, institutional-building, policy advice, development of methodologies, uptake of tools, advice on reform and institutional development);
- B. Regional thematic peer-learning or capacity-building on qualifications system reform through events (e.g. EQF referencing seminars, NQF conferences, VNFIL conferences, etc.);
- C. International ETF level activities with some focus on qualifications systems reform (i.e. international ETF conferences, workshops or seminars);
- D. ETFs work to develop, monitor or evaluate EU interventions (support EU delegation);
- E. Thematic analysis produced by the ETF (e.g. reports, toolkits), including the qualifications platform;
- F. Thematic analysis, knowledge activities produced in cooperation with other organisations, such as Cedefop and/or UNESCO (e.g. inventories on NQFs and VNFIL, World Reference Levels).

2.2 Positioning the qualifications work in ETF

From January 2015 to December 2018, the Strategic Project (SP) 'Qualifications and Qualification Systems' had a dedicated budget for qualifications specifically and covered a range of in-depth work (such as capacity building activities, studies, and events). There was a team of five experts entirely dedicated to questions related to qualifications in partner countries, who also carried out activities with EU delegations and the global community (particularly Cedefop and UNESCO). All qualification related projects were managed within this strategic project. Following the 2014 evaluation⁷, a new tool was introduced: The Context-Mechanism-Outcome (CMO) approach. SP Qualifications agreed to use the CMO internally in order to plan interventions and monitor the effects of interventions of ETF qualification experts (the use of the CMO approach and its evolution is discussed in detail in Section 2.4).

Following 2017, a reflection and restructuring process at corporate level led to a **change in operations at the beginning of 2019**. The strategic teams were discontinued and a multi-thematic approach was adopted with projects that are broader, longer-lasting and cover

⁴ European Training Foundation (2019d). Single Programming Document 2020-22: Work Programme 2020, p. 6. <https://www.etf.europa.eu/sites/default/files/document/GB19DECO12%20ETF%20SPD%202020-22%20WP2020.pdf>.

⁵ Androulla Vasilioy (Turin, 2014) - https://ec.europa.eu/commission/presscorner/detail/en/SPEECH_14_630

⁶ ETF (2018). Single Programming Document 2017 – 2020 Annual Work Programme 2019. <https://www.etf.europa.eu/sites/default/files/document/Work%20programme%20FINAL%20doc%20Nov%202019.pdf>, p.17

⁷ Buiskool, B.-J.; Broek, S. et al. (2014). Evaluation of Qualifications activities in ETF partner countries. Final report submitted to the European Training Foundation, Turin - December 2014. ICON-INSTITUTE GmbH & Co. KG Consulting Gruppe. https://www.etf.europa.eu/sites/default/files/2018-07/Evaluation%20of%20qualification%20activities_0.pdf

thematic areas. The aim is to better link qualifications work to other themes such as curricula or teaching. In 2020, ETF launched three new multi-country initiatives⁸, in which the qualifications-work is integrated in the 'Creating New Learning (CNL)'⁹ initiative. It is a multi-annual, multi-thematic project that combines several human capital development (HCD) themes, such as learning and curricula, teaching and teacher training, distance and digital learning.

Under the influence of the **new ETF Strategy 2027**¹⁰, in the coming years the ETF is re-focusing its emphasis from national/institutional level capacity building to planning towards knowledge production, management and organisation that can be used to provide policy advice.

2.3 Resources and partnerships

This section provides a brief overview of the ETF human and financial resources and partners utilised for the interventions over the research period for this evaluation. This helps us to situate the activities and interventions of the ETF in their financial context and provides insight into the scale of activities provided.

The table below shows the annual budget, mission budget and staffing numbers for the years 2014-2019. As can be seen, there has been variability in the annual budget. The budgets increased for most years between 2014 and 2018 (except 2017) and decreased in 2019. 2019 is also the year that the new structure with Thematic Projects started (the Strategic Projects Qualifications ended on the 31 December 2018). The highest annual budget for the qualifications systems reforms activities was around 1 million EUR. Overall, this shows that the annual budgets for the qualifications team are not especially high when compared to overall donor activities within partner countries.

Mission budgets are also variable, but all years are well under EUR 100,000. This also indicates that there is a relatively limited amount of resources available for international visits and activities for the ETF team in comparison to similar international organisations or donor organisations operating in the ETF partner countries.

Finally, the staffing number is set at 10 for 2015-2017 before reducing annually (8 in 2018 and 5 in 2019). In terms of staff changes, some experts involved in the previous SP Qualifications have changed their position within the ETF or have left the ETF and some new experts were recruited for the qualifications team. This shows that there is potentially a reduction in capacity for the team, although 2019 numbers need to be contextualised with the establishment of the Thematic Groups.

TABLE 2.1 OVERVIEW OF RESOURCES 2014-2019

Year	Annual budget (EUR)	Mission budget (EUR)	Staffing number ¹¹
2014	142,336.73	20,000.00	n/a
2015	574,831.10	85,342.42	10
2016	708,851.92	47,825.88	10
2017	661,506.12	69,242.59	10
2018	1,043,475.98	36,167.34	8
2019	299,405.38	66,613.92	5

Source: Summary table and commitments 2010-2019 (project budget and mission budget data) and Annual Implementation Plans (staffing number)

⁸ The ETF work programme for 2020 states: 'In 2020, the ETF will launch three new multi-country initiatives, in the areas of (i) new methods of teaching and learning with a focus on key competences and digital skills, (ii) vocational excellence and innovation, and (iii) skills analysis including the use of big data. The three initiatives will bring EU and global expertise to the partner countries'. See: ETF (2019b), Single Programming Document 2020-2022, p. 5: <https://www.etf.europa.eu/sites/default/files/document/GB19DEC012%20ETF%20SPD%202020-22%20WP2020.pdf>

⁹ <https://www.etf.europa.eu/en/projects/creating-new-learning>

¹⁰ ETF (2019a), ETF Strategy 2027, GB/19/DEC/009.

<https://www.etf.europa.eu/sites/default/files/document/ETF%20STRATEGY%202027%20FINAL.pdf>

¹¹ Staffing number refers to permanent staff and not the in-country expert networks. The figure refers to the number of persons with assigned tasks in the plans of the qualifications team and not to full-time equivalents.

The ETF qualifications systems reforms activities are conducted with a wide range of **partner organisations and stakeholders**. The table below provides an overview of the main stakeholder groups.

TABLE 2.2 ETF PARTNERS

Type	Partners	Example activities
National governments	Ministries	Work with Ministry and authorities by providing expertise for the reform of qualification systems in partner countries, including policy and technical advice on NQF developments and advising on how to improve vocational qualifications, monitoring of annual progress of NQFs and facilitating knowledge dissemination.
European Commission	DG EMPL Cedefop	ETF as member of Advisory Group; advise on text of any revised Recommendation and EQF's international dimension; advise candidate and potential candidate countries on referencing and alignment ETF conduct conceptual work together with Cedefop
VET authorities	Qualifications Agencies, QA authorities	Supporting activation and establishment of governing institutions, including QA systems. Assist officials in the implementing of qualification systems and driving reform forward.
VET institutions	HE institutions, education and training institutions	Support the development of well-functioning and efficient systems
Employer organisations	Sector Skills Councils, sector umbrella organisations	Modernisation and relevance of qualifications support
EU Delegations	Partner country delegations	Content and methodological advice to EU Delegations in implementing EU projects
Other organisations	UNESCO, ILO, GIZ, British Council	ETF is engaged with these organisations both for conceptual work and operational activities in the Partner Countries (alignment of initiatives, involvement of each other in activities, etc.).

2.4 The use of the CMO approach and potential lessons to be learned¹²

Definition and description of the CMO approach

The CMO (Context-Mechanism-Outcome) approach was recommended following the 2014 evaluation¹³ to support intervention actions (and their linked outcomes) to the specific contextual features of the partner countries individually.¹⁴ Previously, approaches had been focussed on 'regional' interventions that did not explicitly account for variations between geographically close countries that could affect the effectiveness of the interventions. The box below provides a concise description of the CMO approach.

The CMO was an operational document that gave a description of:

1. The relevant **context** of a country/regional project.
Based on the context, countries were allocated an initial, intermediate or advanced stage of development. Core features of the context are:
 - Level of progress achieved in reforming qualifications systems (through NQFs)
 - Stage of implementation of reformed institutional structures
 - Engagement of employers in policy discussions (and with providers in developing curricula)
 - Level of progress in developing outcome-based qualifications.
2. The **mechanisms** and related interventions that expected to lead to particular outcomes in the given context. The evaluation report gives a set of mechanisms for each stage of development that seem to be most effective in that stage. These sets of mechanisms were used in the CMO to ensure an easier comparison between countries and provide evidence on whether mechanisms are effective as thought. Interventions are the concrete activities that are planned to enforce a mechanism.
3. The **outcomes** of interventions and related outputs were described and included the expected impact of interventions in terms of practical effects. This covers which areas were expected to move forward as a

¹² This section discusses 'Q1: Assess the evolution of the ETF work on qualifications by taking stock of the use of the CMO approach' and is mainly based on interviews with ETF staff members and document analysis.

¹³ Buiskool, B.-J.; Broek, S. et al. (2014). Evaluation of Qualifications activities in ETF partner countries. Final report submitted to the European Training Foundation, Turin - December 2014. ICON-INSTITUTE GmbH & Co. KG Consulting Gruppe. https://www.etf.europa.eu/sites/default/files/2018-07/Evaluation%20of%20qualification%20activities_0.pdf

¹⁴ There is no officially published guidance document available but some internal guidelines were developed based on the 2014 evaluation report and shared within the team.

result of interventions and how interventions were expected to contribute to decision making in these areas. The outputs are the concrete products and measures related to the outcomes.

The use of the CMO approach between 2015 and 2018

The interviews confirmed that the CMO approach was used between 2015-2018 by the Strategic Projects Qualifications team as a standardised approach (an internal planning document) to inform the interventions within partner countries, albeit with some variation in level of detailing provided by experts. An internal guidance document was prepared based on the 2014 evaluation report and the CMO fiches and reflections for countries were central to the work of the qualifications team.

The experts using the CMO approach during this period generally considered it very useful as it helped to:

- Focus on the specific country and provide a snapshot of the stage of development of country and then identify what outcomes there should be;
- Clearly define the ETF role among the many other agencies in the country, identify relevant ETF interventions and prepare a country strategy paper (for the following three years);
- Explain the link to the strategic development of a country and support country managers to see how the interventions prepared related to qualifications fit to the development of the partner country;
- Plan actions and support countries in a structured way and help them to develop towards the next stage;
- Identify and reflect on changes and progress made and annually update the country fiches and compare one year to the next.

Although the approach was generally considered to be very effective and seen as a very good instrument for delivering technical assistance, for planning interventions based on the development of a country and for monitoring progress, it was also sometimes perceived as quite planning and resource intensive as the CMO and implementation plans contained a great deal of detail. As implementation often required rapid changes, this detailed planning was sometimes seen as a challenge, just as the overall planning within the SP structure was generally perceived as rather heavy and complex.

Since the new working structure was implemented in 2019, the CMO approach has been used less and it is no longer a requirement anymore. This means that ETF staff are not completely clear on whether and how the CMO approach should be used. It is also less well known to newer members of the qualifications team or they have only used the CMO templates prepared by other colleagues as background information rather than as a tool to define the actual approach and without updating them for the following year. Country strategy papers are still being prepared but they are less detailed than the CMO templates. Although it might generally not be implemented in the same way as during the SP Qualifications (the level of detail is not the same), it is still used in some cases as a conceptual base for organising and understanding what is going on in country and for underpinning ETF interventions. For example, it is used as a tool for planning and the contextualisation of the planned activities in Sub-Saharan Africa.

Lessons to be learned for the future

Whether the CMO approach could be used for groups of countries (regional approach), albeit in a simplified or scaled-down way is currently being discussed. A similar tool that works across countries and themes in the newly established transversal projects (thematic approach) in

which the qualifications topic is now integrated could be useful. It might also be useful to plan next steps in EU funded projects.

The ETF also uses another tool, the 'country progress indicators (CPI)', which monitors and measures progress of reform in the countries and was inspired by the CMO logic¹⁵: Most of the indicators are of qualitative nature and baseline indicators are defined for the different thematic areas (such as government, employment, quality assurance and also qualifications. In order to keep the logic of the CMO for planning and monitoring and to transfer it to all thematic areas, the CPI (or similar indicators) might also be useful in the future approach.

As the CMO approach was particularly appreciated for its structuring and monitoring functions, the main elements that should be taken forward are the ones related to assessing progress made. Moreover, the CMO approach is also seen as an attempt to create an impact chain (by describing how interventions and outcomes/output relate to former achievements) and impact assessment is an important aspect to be more strongly emphasised in the future. Thus, a tool that is based on the CMO approach and fits to the current ETF strategy should help to collect evidence, measure the impact across countries, and assess what intervention has worked in which context. It needs to be acknowledged, however, that qualifications systems are continuously changing and that this makes it very difficult to measure impact. Recent work from ETF and Cedefop has tried to establish progress indicators in this field (see box below).

In cooperation with Cedefop and in response to a request by the sub-group of the EQF Advisory Group on '**Comparison of third country frameworks with the EQF**' (led by DG EMPL), ETF is currently working on the development of commonly agreed progress indicators of NQF (and Regional Qualifications Frameworks, RQF) development and implementation for impact assessment and cross-country comparison. This work, in particular, brings together the models of evolution of qualifications frameworks that were separately developed by Cedefop (in cooperation with the EQF Advisory Group) and the ETF. While the previous Cedefop model focussed more on the functionality of frameworks and its operationality in the context of the EQF implementation, the ETF model put a stronger focus on the policy process, as the focus was on qualification systems in the national context of education and training and labour market policies. Both were in line with the specific mandate of each agency and described stages of NQF developments. The current work is an attempt to bring together these rather distinct perspectives and develop a cyclical model, instead of a model in stages, to acknowledge the continuous and iterative development of frameworks. While it is suggested that the stages developed in this combined approach are the same for national and regional qualifications frameworks, the set of (qualitative) indicators for each stage differs.

As a consideration for the future, also regarding the use of CPIs, there is a need for an analytical approach and to use a tool that assesses progress made within the scope of the new intervention logic. This tool should not be too detailed but should support the coordination of activities within and across the thematic projects in order to achieve a better common understanding of what is happening and what needs to be done. The future tool need not be a completely new invention but should be built on what has been used previously (such as the CMO or the CPI) as well as on the cyclical model that is currently being developed.

¹⁵ The CPI were introduced in the 2015 Work Programme to measure the overall impact in partner countries and identify areas where countries are strengthening/losing ground with their HCD reform. ETF (2014a). ETF Work Programme 2015. GB/14/DEC/014. https://www.etf.europa.eu/sites/default/files/document/GB14DEC014_EN%20FINAL.pdf

3. Findings related to evaluation questions – looking back

This section presents the findings on the effectiveness of the ETF actions to support the reform of qualifications systems. The first sub-section (3.1) looks at the effectiveness of different types of ETF actions. Section 3.2 looks at impact and sustainability, section 3.3 presents the coherence/coordination within partner organisations, and the final sub-section presents the factors for success identified through the research.¹⁶

3.1 Effectiveness of types of ETF interventions¹⁷

As introduced in Section 2.1 ETF activities are clustered in seven groups and survey respondents were able to respond for all seven groups¹⁸. As can be seen in figure 3.1 below, in terms of the ETF interventions that the survey respondents consider add the most value to qualifications systems reforms, it is clear that the specific country support (71%) and the international ETF level activities (71%) are the most. The thematic analysis produced in cooperation with others and the development, monitoring and evaluation of EU interventions (22%) are found to be the least effective activities. This contrasts with the findings of the *previous evaluation*¹⁹, where there was a slightly higher priority placed on ETFs analytical work as being the most effective.

In addition to indicating which activity adds the most value, survey respondents were asked to select the ETF type of intervention they know best and answer some further questions on the intervention selected. The following figure provides an overview of how respondents assessed the quality aspects of the ETF activities. The number of respondents is mentioned per ETF activity. From figure 3.1 it can be concluded that generally speaking all aspects are assessed between 'good' and 'excellent'. Overall positively assessed aspects are the provision of information during the activity, prior to and after the activity, timely implementation, and the planning of the activity. Generally weaker are the weaker aspects concern the division of roles and responsibilities and the knowledge of the organisation involved in the specific country support activities and the support to continuity in relation to regional thematic peer-learning activities (in general, these activities are considered useful but do not seem to be sufficiently followed up).

The sections following Figure 3.1 contain the results of the effectiveness analysis on the separate categories of ETF activities referring both to the survey results and the interviews at international level and country level.

¹⁶ As background and contextual information, in the annex a section is included describing the current stage of development for partner countries.

¹⁷ This section discusses the Q2: How effective has the ETF been in developing and applying principles of qualifications systems reforms (through NQFs) and operationalising these principles in the partner countries? How did the ETF influence the qualifications systems reforms in the country?

¹⁸ A. Specific country support activities (capacity-building, institutional-building, policy advice, development of methodologies, uptake of tools, advice on reform and institutional development); B. Regional thematic peer-learning or capacity-building on qualifications system reform through events (e.g. EQF referencing seminars, NQF conferences, VNFIL conferences, etc.); C. International ETF level activities with some focus on qualifications systems reform (i.e. international ETF conferences, workshops or seminars); D. Activities of linking partner countries to international developments (engagement in EQF, support to countries in referencing processes and reporting, interventions to influence the EQF Recommendation); E. ETF's work to develop, monitor or evaluate EU interventions (support EU delegation); F. Thematic analysis produced by the ETF (e.g. reports, toolkits), including the qualifications platform; G. Thematic analysis, knowledge activities produced in cooperation with other organisations, such as Cedefop and/or UNESCO (e.g. inventories on NQFs and VNFIL, World Reference Levels).

¹⁹ Buischool, B.-J.; Broek, S. et al. (2014). Evaluation of Qualifications activities in ETF partner countries. Final report submitted to the European Training Foundation, Turin - December 2014. ICON-INSTITUTE GmbH & Co. KG Consulting Gruppe. https://www.etf.europa.eu/sites/default/files/2018-07/Evaluation%20of%20qualification%20activities_0.pdf

FIGURE 3.1 ETF ACTIVITIES ADDING MOST VALUE TO QUALIFICATIONS SYSTEMS REFORMS AND ASSESSMENT OF QUALITY ASPECTS OF ETF ACTIVITIES²⁰

	ETF ACTIVITIES ADDING MOST VALUE TO QUALIFICATIONS SYSTEMS REFORMS (N=45)	QUALITY ASPECTS								
		Planning of the intervention/activity	Provision of information prior to the intervention / activity	Division of roles and responsibilities	Clarity of expected outputs and outcomes	Provision of information during the intervention / activity	The level of knowledge and understanding of the organisations involved	The timely implementation of the intervention / activity	Provision of information after the intervention / activity	Provision of measures to support continuity after ETF support
A. Specific country support activities (capacity-building, institutional-building, policy advice, development of methodologies, uptake of tools, advice on reform and institutional development) (16)	71%	4.31	4.38	4.00	4.13	4.53	4.00	4.31	4.38	4.33
B. Regional thematic peer-learning or capacity-building on qualifications system reform through events (e.g. EQF referencing seminars, NQF conferences, VNFIL conferences, etc.) (9)	53%	4.67	4.67	4.67	4.44	4.67	4.33	4.44	4.38	3.86
C. International ETF level activities with some focus on qualifications systems reform (i.e. international ETF conferences, workshops or seminars) (6)	71%	4.50	4.17	4.40	4.17	4.67	4.20	4.50	4.60	4.60
D. ETF's work to develop, monitor or evaluate EU interventions (support EU delegation) (no responses)	22%									
E. Thematic analysis produced by the ETF (e.g. reports, toolkits) (5)	33%	4.20	4.40	4.75	4.40	4.60	4.40	4.50	4.60	4.33
F. Thematic analysis, knowledge activities produced in cooperation with other organisations, such as Cedefop and/or UNESCO (e.g. inventories on NQFs and VNFIL, World Reference Levels) (no responses)	22%									
Cross-activity assessment (36)		4.42	4.45	4.37	4.26	4.62	4.16	4.43	4.42	4.27

Source: Online survey (N=45 (added value); N=36 (quality aspects))

²⁰ The respondents were asked to assess the quality of various aspects of the different ETF activities (Very poor; Poor; Average; Good; Excellent). For reporting reasons, these answers are post-coded into a scale running from 1 (poor) to 5 (excellent).

A. Specific country support activities

Specific country-support activities cover the bi-lateral support that ETF provides to partner countries. This support is primarily provided to Ministries and national agencies but can also involve partner organisations (GIZ, British Council) and the EU Delegations, depending on their involvement in supporting reforms. The specific country support is coordinated through Country Coordinators and the qualifications teams. Activities can include capacity building (i.e. workshops and trainings), institutional building, policy advice, methodology development, review of legal texts and draft laws, uptake of tools, and advice on the reforms and institutional developments.

Based on the survey results and validated by the interviews, **specific country support is found to be an effective intervention for qualifications systems reforms**. The evaluation found that ETF has a positive effect on partner countries, with NQFs as a particular area of progress. In particular, a survey respondent from Ukraine stated that 'ETF country support activities influenced the policy development in the country to a great extent: e.g. NQF implementation action plan, National Qualifications Agency, qualifications register and other developments were done under direct expert support from the ETF'. This finding is also supported by the Evaluation of EU Agencies (2018) report, which found that the ETF made a significant contribution to help partner countries in the development of national strategies and reform programmes while ensuring national ownership, with the area of VET and qualifications systems support particularly valued²¹. The variety and flexibility of ETF support is also found in the different experiences of Partner Countries, as shown in the box below.

North Macedonia

The strengths of ETF intervention in particular refer to the **quality of expertise** provided and the approach used for providing **direct support** at country level, in particular by **supporting countries in developing their own strategies instead of imposing them**. The **involvement of experts** was mentioned as a further strength.

Stakeholders at national level in particular referred to the **long-term, continuous, sustainable support** provided to the country since its eligibility for the Phare programme (1996-1997) and the direct support to the national reforms in aligning the processes with the European strategic orientation, application of EU tools. A further key strength of the ETF approach is that it supported the country to develop its own strategy.

The **technical expertise** of the individuals involved, as well as their personal commitment and their skills in **linking relevant actors** were also highlighted as key strengths. For the latter aspect, the following examples were highlighted.

- Linking the relevant actors in the development of sectoral approach to the reforms: Ministry of Education and Science, VET Centre, Centre for Adult Education, Ministry of Labour, National Employment Agency, VET schools, HE sector, business sector – chambers of commerce, associations of employers, trade unions.
- Enabling capacity development and linking with the EU fora for dialogue in the sector (participation to different ETF events in all topics under the mandate of the Foundation, support to the participation of national experts in DG VT, advisory groups, working groups under ET 2020) etc.
- Support to the EU Delegation in addressing the sectoral approach to the EU support to national reforms.

Ukraine

ETFs core strength lies in the **technical knowledge** and **access to a network of qualified experts throughout Ukraine**. In addition, ETF is also seen as a **listening organisation**, which made it more of a partner at times. The significant contribution the ETF could make as a reference point was noted, and the support that the ETF provided on the Law on Education (2017) was cited as a major contribution to the progression of the qualifications systems reform. Partners viewed the ETF as having a high level of technical expertise. This allows ETF to conduct detailed analysis on specific topics and provide a level of technical resources not available to other stakeholders. ETF was also viewed as having a much wider understanding of the field of qualifications reform and the new ideas and European experiences that can form the basis for policy support. Similarly, the planned activity of harmonisation of the NQF with the EQF were seen as an area where the ETF has significant expertise and comparative advantage.

Kosovo

The strengths identified by stakeholders at national level referred to the **overall high quality** of ETF projects in general, their approach in **seeking beneficiaries to assume full ownership** of projects, the **involvement of national and international experts, and their experience in contributing international experience and expertise to the projects**.

For the ETF projects in Kosovo, it was considered particularly valuable that ETF involved both local and international experts. Furthermore, ETF used its international network to create the possibility for working group members to attend study visits in different countries to learn more about successful implementation of RPL arrangements.

ETF support was considered as profoundly based on international experience and developments, while at the same time taking into consideration the national context and the needs of the beneficiaries. This was considered as

²¹ DG EMPL (2018). Evaluation of the EU Agencies under the remit of DG Employment: EUROFOUND, CEDEFOP, ETF and EU-OSHA. FINAL REPORT. <https://ec.europa.eu/social/BlobServlet?docId=21074&langId=en>, p.16

strength. ETF was described as a partner that always sought to make sure that the country assumes full ownership of the projects and initiatives. It was pointed out that experience with other donor organisations or development partners was not always equally good – mentioning projects where the country had to fight for ownership and projects had very little sustainability despite large sums invested.

ETFs key strength lies in terms of **overall policy direction and providing support to governments in setting priorities**, i.e. providing the beneficiaries with a direction on where to go with their qualifications system, by putting in a framework that allows progression. ETF was considered to do remarkably well in pushing things forward. Another strength identified was that ETF has set up and maintained a continuous dialogue on qualifications at international level, in particular outside the EU.

Concerning the effectiveness of specific country support activities, the evaluation led to the following more specific findings:

1. **Flexibility provides the basis for effective support:** In particular, the 'tailored' approach is valuable for countries at early stages (who need more awareness raising support), allows for 'on-demand' and direct access for partner countries, and provides 'fit-for-purpose' support through the usage of local experts.
2. **The use of local expertise is highly effective:** The use of local experts was identified as an important element in effective country-support. This was found to enhance both the relevance and the trust that stakeholders have in the support.
3. **Country relationships are critical:** The findings show the importance of the in-country relationships as key to the effectiveness for support. There were clear differences between countries, with some less engaged countries (BiH, Morocco) cited as especially challenging due to ministerial blockages. The coordination with other organisations (see the coherence and complementarity sub-section below) is also crucial for achieving effectiveness within country support.
4. **Linkages to EU programmes are effective when coordinated well:** Linkages to EU programmes are effective and offer scope for ETF to leverage capacity and influence into larger-scale programmes. A particular example is the Ukraine, where a high degree of coordination between ETF and the EU-D has meant that the EU4SKILLS programme (budget EUR 54 million) contains a significant component on qualifications systems reforms that is directly linked to the preparatory work that ETF has been conducting for the last 4 years. All stakeholders interviewed for the country research identified the relationship between the EU Delegation and ETF as highly productive and positive. As in point 4, the effectiveness of this approach is highly related to the relationships with the EU Delegations.
5. **Capacity building and ETF training support is effective when specifically targeted and avoiding overlap with what other partners do:** The research found that capacity building support is very effective and a key support function that the ETF can provide to partner countries, especially when it supports targeted and highly specialised capacity building opportunities to the most important 'change agents' in countries. Donor organisations with larger resources also provide capacity building support and, in many cases, partners such as the EC have greater scale and reach than ETF within partner countries to leverage into capacity building support. The ETF, through its knowledge on the topic and of the countries, found a specific niche for effective capacity building. Within the ETF support, there is the capacity to work intensely only with very few countries (such as Ukraine) and resource constraints mean that this cannot be provided to all ETF partner countries.
6. **External partners value the contextual knowledge of ETF:** External organisations found that local knowledge and contextual understanding is a key feature of the ETFs expertise. In particular, this is valued for the early stage support to programmes. This was identified in Ukraine, where the EU4SKILLS programme will be based on the previous work in the qualifications system reform conducted by the ETF. External organisations valued the liaison work that ETF can facilitate, in particular in the ability to bring together wide groups of national and international stakeholders in partner countries.

B. Regional peer-learning activities

Regional peer-learning activities are conducted with participants from the ETF regions (EP, SEMED, Western Balkans) and cover qualifications systems reforms topics directly. These include EQF referencing seminars, NQF conferences and VNFIL conferences. These activities are often co-organised with partners (e.g. ILO) and can also involve workshops and study trips to Turin or other MS or partner countries.

Overall the analysis indicates that stakeholders do not view regional activities as of the same significance as the international and specific support activities implemented by ETF. This being said, the **exchange of experience in a regional context is valued by participants**. The research found collaborative workshops and regional activities to be effective as they allow participants to develop a common understanding of the development of qualifications systems, provide opportunities to network with people from other countries and regional representatives, and generate exchange experiences with technical experts. The survey reports 53% of respondents assessed regional peer-learning as a valuable activity. The case study for North Macedonia also confirmed this, in particular mentioning regional conferences and the involvement of experts from the region (e.g. from Croatia for the NMQF development). Experts from North Macedonia were in turn involved to support the ongoing developments in Montenegro, Bosnia and Herzegovina and Turkey. The Ukraine country research interviews identified that regional workshops and peer-learning events were important to some participants, although others found that there was not a highly significant effect on learning or understanding for participants. With regard to regional peer-learning, there are **regional differences**. In the Western Balkans, countries have similar approaches and are at comparable stages of development, hence making peer learning more effective. This is less the case in the EE or SEMED region, making those countries less likely to benefit from regional peer-learning activities.

C. International level ETF activities with some reference to qualifications

There are a number of ETF activities that focus on corporate level outputs with some connection to qualifications, which includes conferences (held in 2014, 2016 and 2019) and the online platform Open Space²² (analysed separately in the section below).

Based on the survey results and validated by the interviews, **international level activities are found to be highly effective**. The highest number of survey respondents (71%) found that international level activities were a value-adding activity. This corresponds with the interview findings, with multiple external stakeholders citing activities such as workshops and conferences as an effective ETF activity. The interviews with key stakeholders (internal and external) found that conferences contributed to significant progress in **developing and expanding thematic discussions**. In particular, the discourse had moved from a technical understanding of systems to analyses of the end-user impact of systems. The Kosovo country research corroborates this finding, with interviewees finding that the ETF was very successful in setting up an international dialogue on the broader topic of qualifications. External interviews with partner organisations also found that conferences were viewed as especially valuable opportunities for learning and exchange on the qualifications topic. The international activities also provided highly valued **opportunities for international peer-learning**. In Ukraine, corporate/international level outputs, in particular conferences, provided a very important opportunity to exchange on knowledge and experience both between stakeholders and in other countries.

D. ETFs work to develop, monitor or evaluate EU interventions (support EU Delegation)

The ETF supports EU work through cooperation with the EU Delegations and DG EMPL. This can include a range of activities, including policy and programme advisory work, monitoring of implementation of reforms, strategic and action plan implementation, and ad-hoc support.

²² <https://openspace.etf.europa.eu/>

This approach allows ETF to coordinate and contribute with large scale EU support programmes.

The interviews found that **ETF technical expertise is highly valued by EU partners**. EU partners view the ETF as having specific technical expertise that is not available internally or through other partners. ETFs role as policy advisor is therefore highly valued. This is closely linked to the long term-approach, contextual knowledge and stakeholder relationships that the ETF has in partner countries, which can be leveraged to support EU Delegations and to inform DG EMPL activities, such as the EQF Advisory Group. The ETF is also viewed as being able to give outside perspectives on topics such as the global inventory of NQFs, which are not visible to EU partners. Overall, this means that EU partners view the ETF as having a high added-value.

Furthermore, the evaluation found that **collaboration between EU partners and the ETF was broadly effective**. Coordination was considered highly important and the interviewees found that the ETF were accessible. Despite these positive functional aspects of the collaboration with EU partners, some challenges were identified, including a slight difference in perspective between the ETF and partners on issues such as involvement in programme direction. There is an understanding among many EU stakeholders that the ETF is a supporting technical resource that is leveraged in to support EU programmes according to need. This can limit the opportunity of the ETF to direct and coordinate interventions planned by the EU and carries some risk of being side-lined. Alongside this, in order for ETF to provide support when required, there still needs to be an awareness and monitoring of long-term developments. Finally, the decentralised approach of the EU Delegations can lead to diverse approaches and views on the involvement of ETF support. In this respect, the relationships of the ETF with the specific Delegations are very influential on the actual functioning and delivery of ETF support. The box below presents findings from Ukraine, where the ETF has had a significant role in preparing the qualifications reforms actions for the EU4SKILLS programme.

Ukraine
 Interviewees expressed confidence that ETF was well-coordinated with other donors working on qualifications systems reforms (and the wider VET reform) in Ukraine. A key relationship is with the EU Delegation and interviewees view this as a close and strong partnership. The EU Delegation state that there is a positive relationship with ETF and that they rely on the ETF to cover technical aspects when support is needed. The EU Delegation has taken an active role in integrating ETF qualification systems support into the wider EU VET reform programme. The Action Plan, supported through the EU VET Reform programme, was developed in coordination with the ETF inputs and all partners interviewed saw this as a collaborative and productive approach. All partners agreed that the division of responsibility were clear going into the next implementation period and that there was a high degree of clarity and complementarity of roles. However, one challenge was noted in the interaction between the EU Delegation and ETF related to the balance of inputs. The EU Delegation perceive the ETF as primarily a support, to be leveraged into the programme when they are required, while the ETF perceive a more central role. Stakeholders interviewed viewed the role of ETF as providing specific technical support that is well-coordinated with other stakeholders. The current working methods are considered as both appropriate and effective, with no overlap or replication of tasks seen between the EU Delegation, GIZ and ETF as the major donor actors in the area of VET reform. Within this area, qualifications systems reform is considered a competence of ETF by all stakeholders. A particular role that stakeholders saw ETF performing is to introduce new ideas and policy approaches at the Ministerial level, which could be supported by the daily activities of GIZ to progress reforms. In this sense, there could be a coordinated 'top-down' and 'bottom-up' aspect to the reforms. As such, capacity building is not considered as complementary to other donor activities as the policy advisory support that ETF can provide.

Another tension concerning the ETFs association with EU programmes relates to whether it is possible **to act both as a policy advisor and as a monitoring body in the context of a reform programme in the country**. This is a broader question for the ETF as the direction of thematic support and functions is more focussed on policy advisory expertise. Monitoring offers a clear and integrated role in EU programmes that allows the ETF to maintain a position of 'critical friend' but also limits the higher-level input that can be offered.

E. Thematic analysis and toolkits, including the Qualifications Platform

The ETF provides analysis and toolkits at the thematic level. Common tools were developed in order to advocate common principles in all partner countries²³. These specific tools, in particular the 'Making Better Qualifications', the self-assessment tool and 'Qualifications Systems: Getting Organised', were used by partner countries in order to progress reforms. Furthermore, interviewees indicated that the 'Qualification Systems: Getting Organised' handbook was effective in moving partner countries away from frameworks and towards systems approaches. Hence, the **common tools have been effective in supporting countries to progress qualifications systems reforms**. Multiple interviews with external organisations found that the common tools are relevant and useful to stakeholders. This is supported by the survey, in which 33% of respondents identified common tools as a valued ETF activity.

The analysis found that the ETF thematic analysis is viewed by stakeholders as **particularly valued for the on-the-ground knowledge that underpins the research**. The experience and knowledge that the ETF has gained through long collaborations on qualifications systems reform with partner countries is viewed by both internal and external stakeholders as a key feature of the ETF and is not replicated by organisations working in the same space. Interviewees from external organisations repeatedly cited the unique perspective of the ETF in bringing together international knowledge and long-standing country expertise. An external interview identified that the ETF has to maintain partner country work in order to present themselves as a centre of expertise as this provides a rooted understanding of the drivers and agencies of change. It is therefore important that the experience of the ETF in partner countries is not lost in the next phase of implementation. The new thematic teams and qualifications experts should identify methods to maintain involvement in partner country qualification systems reforms bearing in mind resource constraints and an emphasis on policy level advice. This could involve more strategic involvement in partner countries, building on monitoring activities and higher-level policy advisory work.

In terms of **informing partner countries about the tools**, the coordination of workshops and peer-learning activities (visits to Turin) to support uptake of tools in partner countries is found to be effective in terms of uptake. Stakeholders valued the extra knowledge and learning that is transmitted through capacity building activities incorporating the tools.

ETF Qualifications Platform and Open Space²⁴

The online platform is a key component of ETFs current approach to be a knowledge hub and as a tool for generating international collaboration and learning. An online platform, the previous ETF Qualifications Platform, was used to engage over 850 policy makers worldwide in discussions and external blogs. Following the international conference in November, 2019²⁵, the platform was moved to Open Space²⁶. The Open Space platform will support the strategic aims of the ETF in the 2027 Strategy, in particular the aims of becoming a global knowledge hub and a reference for partner countries in the field of human capital development²⁷.

There is **limited evidence of the effectiveness of the online platform in the international arena**. The principle reason is that the Open Space platform has only been in operation since 2019 and it is therefore very early to be able to identify the effects, especially as many adaptations

²³ See for instance: The Toolkit 'Getting organised for better qualifications' (2017), to support experts, officials, and stakeholders in the partner countries involved in improving their qualification systems. The Toolkit 'Skills & Qualifications: Benefits for People How learning and guidance professionals make it happen' (2019), to advise partner country actors on how to channel the benefits of skills and qualifications to main user groups through decision-making on guidance, curricula and teaching; The Study 'Making better vocational qualifications: Vocational qualifications system reforms in ETF partner countries' (2014). An online platform, the ETF Qualifications Platform, was used to engage over 850 policy makers worldwide in discussions and external blogs. Following the international conference in November, 2019, the platform was moved to ETF Open Space (<https://openspace.etf.europa.eu/>).

²⁴ This section is linked to Q4: What has been the effect of the ETF work in the international arena on qualifications? How has the online platform contributed and how will the transition to Open Space further support this?

²⁵ <https://www.etf.europa.eu/en/news-and-events/events/2019-etf-conference-skills-and-qualifications-benefits-people>

²⁶ <https://openspace.etf.europa.eu/>

²⁷ ETF (2019a), ETF Strategy 2027, GB/19/DEC/009.

<https://www.etf.europa.eu/sites/default/files/document/ETF%20STRATEGY%202027%20FINAL.pdf>, p.5

and changes to the platform are currently being implemented. Richer material was sourced from the internal ETF interviews, which provided a wide range of reflections from interviewees on the current and potential impact of the Open Space platform. Overall, it was a shared view that Open Space needs further development to reach its potential. In comparison to the previous Qualifications Platform, interviewees currently saw a lower level of interaction and engagement in the functioning of the Open Space. This was recognised to be partially a result of the newness of Open Space but this will need to be prioritised in order to ensure that the potential of the platform is achieved. The box below provides an overview of considerations to improve the effectiveness of the Open Space platform for working on qualifications.

- Considerations for Open Space:
1. **Videos and blogs should be used more than long-reads:** Evidence from interviews finds that videos and blogs need to be used more, as long written contributions may not be read and therefore not really achieve much impact. This can also include tools such as Webinars (which have been held in Kazakhstan and Kyrgyzstan due to travel budget constraints), which not only reach participants but also stimulate further discussion and interaction.
 2. **Engagement should be expanded:** Members of the Qualifications Platform have been retained through re-registration on Open Space. The next step that interviewees identified is to maintain engagement. The interviews found that there is a difference between the Qualifications Platform and Open Space in this regard, for example the very active Russian language community in Qualifications Platform is now less active in Open Space, despite it now being a multi-lingual platform. Another factor to be considered is that the platform could become too simple and does not provide the in-depth discussions that were a feature of the Qualifications Platform. The research also identified that the knowledge of members is the key feature of the Open Space and that this needs to be drawn out more. In particular, simply sharing tools is not enough as there should be discussion, exploration, assessment of strengths and weaknesses of tools as part of a 'community'. In additions, it was noted in interviews that there was not currently enough effort used to 'keep the discussion alive', with moderators or technical facilitators being identified as a potential solution. A further challenge to increasing engagement in the current Open Space is that there is only one group covering all of ETF, whereas the Qualifications Platform was more specialist.
 3. **Use of correspondents:** The interviews found that the role of correspondents in the Qualifications Platform as a way to maintain community engagement and share knowledge in an interactive way. As Open Space has a broader scope than the Qualifications Platform, there should be a way to ensure that correspondents on qualifications systems reforms are able to continue/restart their activities. One interviewee said that this process was now in motion and that ETF is now hosting meetings to coordinate inputs.
 4. **Information management needs to be considered:** There are challenges in organising and accessing the information available on Open Space, in particular as at a certain point there will be huge volumes of information. How members can access and interact with older information needs to be managed and guided.
 5. **Information on standards and qualifications should be shared more widely:** One feature of the Open Space could be to share standards, especially occupational standards, with other countries. The Open Space provides an opportunity to help partner countries develop and reduce the cost of developing standards. Sharing examples between countries could massively reduce development times and speed up processes.
 6. **Open Space needs to be integrated into other knowledge hub activities:** A risk was perceived from some interviewees that Open Space would become the knowledge hub rather than an important component of the hub. Maintaining a role in the international space is not solely achieved through Open Space. The Open Space platform needs to support other activities (e.g. EQF AG meetings) as well, perhaps through guided discussions and reflections with colleagues and members.

F. Thematic analysis and knowledge products produced in collaboration with other organisations²⁸

In order to use synergies and continuously improve the support offered in the partner countries, the ETF is cooperating with other internationally operating organisations, in particular Cedefop and UNESCO, with whom they have overlapping roles in many sectors but with different regional focuses. Besides peer learning (the agencies jointly organise thematic seminars or invite each other to their events), the main strands of cooperation relate to conceptual work and monitoring. The agencies are involved in international dialogue on qualifications frameworks and in particular cooperate on the development of the Global Qualifications Frameworks Inventory. The inventory is considered to be a successful tool for monitoring and

²⁸ This section is linked to Q4: What has been the effect of the ETF work in the international arena on qualifications? How has the online platform contributed and how will the transition to Open Space further support this?

assessment but also needs to be further developed. The current discussion is on the potential to develop a platform that can better compare different aspects in order facilitate benchmarking. Along with Cedefop and other national, regional and international organisations working in the field of skills development and recognition (e.g. ILO, WorldSkills), the ETF is also a member of the World Reference Levels (WRL) expert group coordinated by UNESCO. In 2017, the ETF cooperated with Cedefop and UNESCO on the study 'The use of learning outcomes to support dialogue between education and training and the labour market'. The study covers 10 VET qualifications in 26 countries and uses the learning outcomes approach to identify similarities and differences between countries, including those outside Europe.

The survey and the interviews suggest that **the knowledge products and thematic analyses produced by ETF in collaboration with other organisations have been effective in the international arena**. The research found that the materials produced have been effective and successful in terms of uptake and exposure. In general, external organisations are highly aware of the products that ETF produces in collaboration with partners. The external interviews show some clear evidence of the ETF having impact in the international arena. The stakeholders consulted were not only aware of just their collaborative work with the ETF, but were also aware of other activities (including tools and publications) that they considered valuable. In the survey, 22% of respondents found that the international knowledge products and analysis adds the most value.

Furthermore, external organisations saw the **ETF as a complementary partner with specific attributes that support collaboration**, in particular due to partner country contextual knowledge and experience. As with the thematic analysis and toolkits, external organisations view the in-country knowledge and applied experience of ETF as specific expertise that is not available through other partners. This applied knowledge was contrasted with thematic knowledge, where other organisations are perceived to have more resources available than ETF. The analysis found that Cedefop and ETF complement each other in their approach (while the ETF has a more policy support role in countries and develops material and toolkits to provide practical support to countries, Cedefop is more focussing on research and analytical work) and the sharing of experience and knowledge is seen as added value for both.

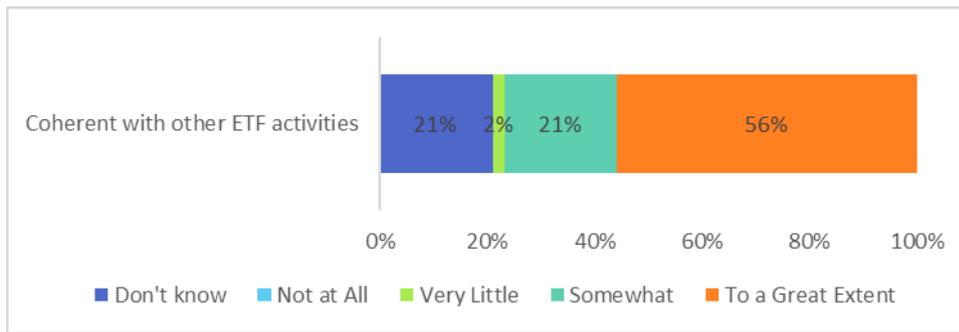
Finally, the research found a high level of awareness of the international level collaborative activities of the ETF, with the World Reference Level Group, EQF Advisory Group (EQF referencing), and NQF Global Inventories identified. The ETF was viewed as an important partner and source of knowledge in these activities. Hence, **the awareness of international level ETF activities is high and contributes to ETF influence in the international arena**.

3.2 Coherence/coordination within partner countries²⁹

The ETF not only supports reforms of the partner countries' qualifications systems but also helps with various issues related to the reform of their education, training and labour market systems. Thus, the survey explored to what extent there is internal coherence between the various ETF interventions in the partner countries. More than half of survey respondents (56%) state that the ETFs training activities are to a great extent coherent with other ETF activities. This is, for example, confirmed by the case study on North Macedonia, where the support related to the qualifications system reform is seen as the key pillar of reform of the education system in the country, providing an umbrella for the reform of teacher training, pedagogy, and VET strategy.

²⁹ This section discusses the Q5: To what extent has synergy and coordination with EU-funded and other major donor-supported (e.g. WB, GIZ) projects in the partner countries been achieved?

FIGURE 3.2 COHERENCE OF ETF ACTIVITIES

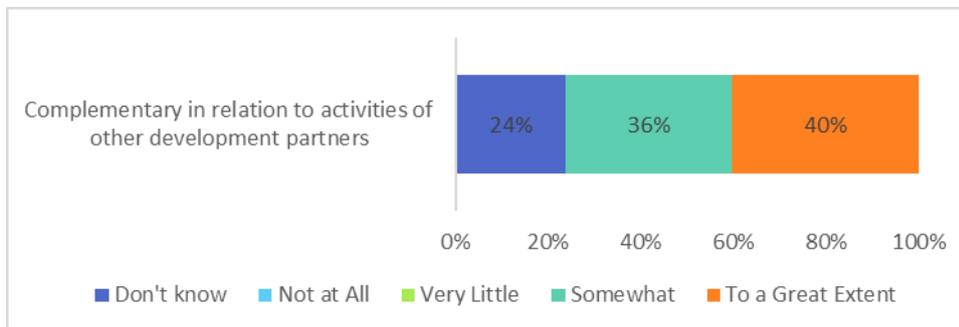


Source: Online survey (N=43)

ETF is not the only organisation working in the partner countries and providing support on the topic of qualifications systems reforms. As an EU Agency, ETF provides EU-funded support and in particular cooperates with the EU Delegations in the countries who programme development cooperation through projects and grants. ETF experts also communicate, support and cooperate with a wide range of (donor) organisations in partner countries, such as the World Bank, EBRD, British Council, Swiss Development Agency, GiZ, ADA, SDC, LuxDev, and USAID.

The survey also explored to what extent there is complementarity (or overlap) between the work of the EU-funded interventions of the ETF and other major donor-supported projects. A high number of survey respondents (40%) consider that the ETF is to a great extent complementary to the activities of other development partners and a further 36% indicate that the ETF somewhat complementary.

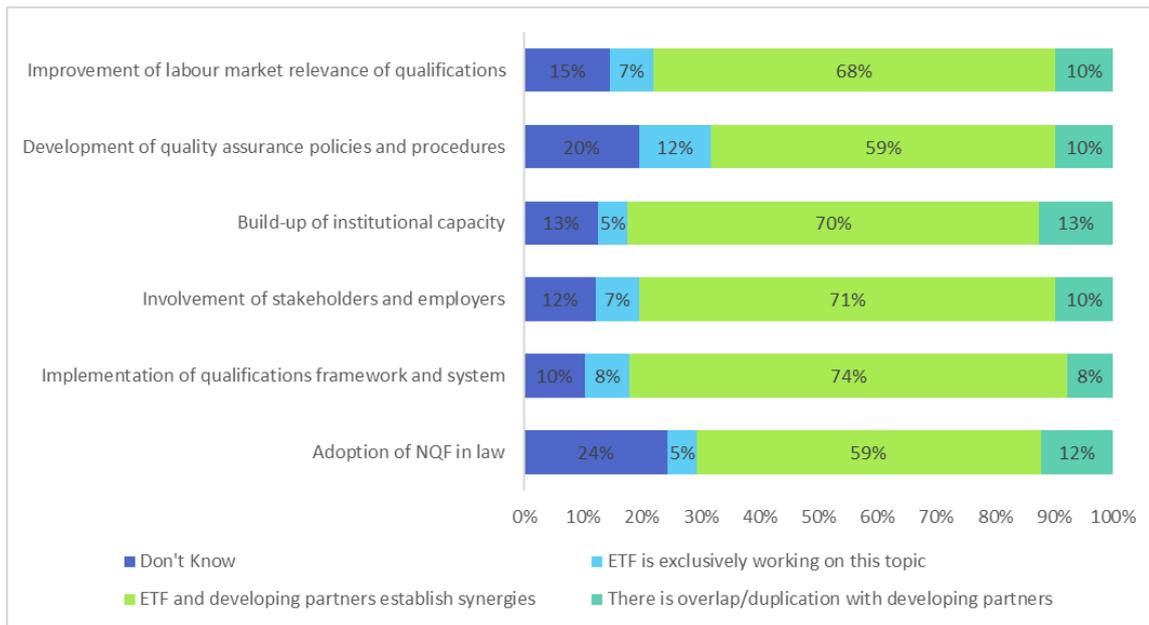
FIGURE 3.3 COMPLEMENTARITY OF ETF ACTIVITIES



Source: Online survey (N=43)

The above-mentioned complementarity of ETFs' work with development partners is confirmed by the fact that respondents of the survey recognise that there are synergies between the ETF and partners on many related issues. On the issue of the implementation of qualifications frameworks and systems, 75% of respondents indicate that partners create synergies. Only 8% state that there is overlap and duplication. The duplication and overlap are mainly seen in connection with institutional capacity building (still low at 13%) and the anchoring of the NQF in law (also still low at 12%). Few respondents see the ETF as an organisation working exclusively on specific issues. For example, 12% say that this is related to the development of quality assurance policies and procedures.

FIGURE 3.4 EXCLUSIVITY, SYNERGIES, OR OVERLAP IN TOPICS ETF IS WORKING ON



Source: Online survey (N=41)

The topic of complementarity can also be highlighted for the Ukrainian case, with a particular focus on policy advice:

Ukraine
 The case study found that there was a high degree of clarity and complementarity of roles. Stakeholders interviewed viewed the role of ETF as providing specific technical support that is well-coordinated with other stakeholders. The current working methods are considered as both appropriate and effective, with no overlap or replication of tasks seen between the EU-Delegation, GIZ and ETF as the major (donor) actors in the area of VET reform. Within this area, qualifications systems reform is considered a competence of ETF by all stakeholders. A particular role that stakeholders saw ETF performing is to introduce new ideas and policy approaches at the ministerial level, which could be supported by the daily activities of GIZ to progress reforms. In this sense, there could be a coordinated 'top-down' and 'bottom-up' aspect to the reforms. As such, capacity building is not considered as complementary to other donor activities as the policy advisory support that ETF can provide.

ETFs work on qualifications in partner countries is generally well-received and appreciated by partner organisations and development partners often request input from ETF experts or ask them to join workshops. The complementarity can in particular be found in organisation's role as a provider of support through policy learning and capacity building while specifically not being a donor.

The quality and extent of the cooperation, however, varies a lot by country. For example, the involvement of ETF often depends on the specific project manager or on the approach of the EU Delegation³⁰. Furthermore, as not all projects are running successfully, ETF experts involved in evaluation or monitoring may be critical of the work of others, potentially causing tensions.

The importance of the relationship with the EU Delegation and challenges related to the balance of inputs are emphasised in the case studies. While the EU Delegations often rely on the ETF to cover technical aspects and take an active role in integrating ETF qualification systems support into the wider reform programme, they perceive the ETF as primarily a support, to be leveraged into the programme when they are required, while the ETF perceives itself as

³⁰ Also the 2016 evaluation of the ETF pointed to some weaknesses in the cooperation with the EU Delegations because 'effective working relationships with EU Delegations are important for the success of ETF activities in partner countries. Currently, these are too dependent on informal aspects which hinder efficiency and effectiveness and there is a need for a more structured cooperation framework.' McCoshan, A., Ruijinga, C., Curtarelli, M. (2016), External Evaluation of the European Training Foundation (ETF). Final Report by the EFECTIV Consortium, p.22

having a more central and directional role alongside holding close relationships with national stakeholders.

While there are some challenges related to the communication and cooperation between the ETF and partner organisations within countries (e.g. related to the fact that the ETF does not have coordinators placed within the countries or that there is quite some staff rotation and a frequent change of responsibilities in the countries), in general, the benefits of cooperation with the ETF as a complementary partner are acknowledged. For example, the ETF can help other organisations to establish contacts in a country because they usually already have a good cooperation with the responsible ministry and other national stakeholders (door-opening function). The support of the ETF is very valuable in particular for the early stages but the ETF also provides a lot of support at later stages, especially with regards to liaison with the EU Delegations and the European Commission. The role of the ETF is seen as to engage at an operational level, provide technical expertise as well as strategic advice (including feedback and quality assurance) and monitor developments. A good collaboration with the European Commission and other relevant organisations is also seen as important aspect for ensuring sustainability of reform processes.

Respondents to the survey see ETFs role mostly as a provider of a platform for networking (77%) and to provide policy advice and support (66%). These are followed by seeing ETFs role as building capacity (59%) and considering the ETF as bringer of new ideas (55%). The least mentioned roles are those of agenda setter (18%), donor coordinator/communicator (14%) and donor (5%). As one survey respondent indicated: 'The ETF is the initiator of innovative projects aimed at increasing the degree of qualifications compliance with labour market requirements, acquaints representatives of partner countries with European best practices, and provides expert and technical assistance to countries in developing qualifications.'

In interviews with representatives from external organisations, the networking aspect was clearly highlighted. The ETF is seen as being in direct dialogue and quite well-connected to the different relevant stakeholder groups in the countries and as actively and systematically trying to bring them together. In general, it was stated that a lot can be learned from this networking activity but in a number of countries this is not an easy task due to political instability.

Linking the relevant actors involved in the reform process was seen, for example, as a key strength of ETF by interviewees in the North Macedonian case study.

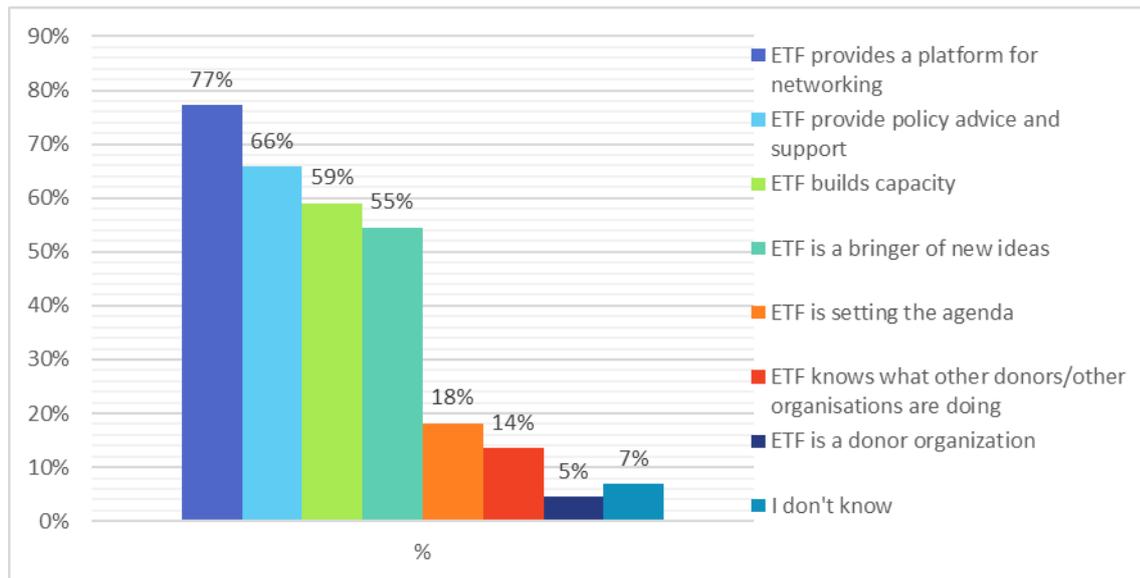
North Macedonia
 National stakeholders interviewed referred to ETFs role as a promoter of networking of different stakeholders, and in maintaining dialogue with relevant organisations including donors, in particular in the form of:

- networking of different stakeholders of the Western Balkans region in reforming the areas covered with the ETF mandate;
- support and contribution to the smooth dialogue with the EU Delegation in Skopje (reporting under the NPAA, planning IPA interventions etc.).

The survey results of the *previous evaluation*³¹, rank the policy advice, training provision and knowledge provider role as top three. The networking role (ranked first in 2020), is only ranked fifth. This suggests that compared to 2014, the profile of ETF in the field of qualifications has changed slightly.

³¹ Buiskool, B.-J.; Broek, S. et al. (2014). Evaluation of Qualifications activities in ETF partner countries. Final report submitted to the European Training Foundation, Turin - December 2014. ICON-INSTITUTE GmbH & Co. KG Consulting Gruppe. https://www.etf.europa.eu/sites/default/files/2018-07/Evaluation%20of%20qualification%20activities_0.pdf

FIGURE 3.5 ROLES IN WHICH ETF IS MOST EFFECTIVE AS EXTERNAL PARTNER



Source: Online survey (N=44)

The interviews with ETF representatives confirm that they are believed to play an important role in supporting partner countries to develop their systems (there are only few international organisations with the technical capacity of ETF) and highlight capacity building activities as well as monitoring and synthesising progress in partner countries. The ETF does not always have a strategic role (this depends on the country), but interviewees also point to the importance of networking, holding good working relationships with other organisations, and not seeing each other as competing entities but as partners with different roles.

The above-mentioned change of the profile of ETF in the field of qualifications compared to 2014 and the strong emphasis on networking can to some extent be linked to the new ETF strategy where partnership is an important element. Since the operational budget of the ETF was reduced, they are not able to offer as much capacity building at the level of detail available through other donor organisations or EU-financed projects. Thus, the role of the ETF has changed. They will still provide policy advice and knowledge to support capacity building but they are withdrawing from direct capacity building activities within partner countries. For this approach, structured collaboration with partner organisations in the countries becomes even more important. In particular, this refers to active participation in setting priorities and agendas, strategic advice and monitoring activities, networking activities (linking organisations and relevant actors involved in the reform process) and the provision of expertise (e.g. by participating in events organised by other organisations), level, which can be combined with the daily Delegation support activities. .

In general, ETFs **cross-country cooperation with other organisations** such as Cedefop and UNESCO on qualifications is highly valued by partner and external organisations. For example, Cedefop and ETF complement each other in their approach (while the ETF has a more policy support role in countries and develops material and toolkits to provide practical support to countries, Cedefop is more focussing on research and analytical work) and the sharing of experience and knowledge is seen as an added value for both.

In order for the ETF to continue being a valued partner in the international arena on qualifications systems reforms, it is important to not only focus on supporting the development of NQFs in the partner countries but to take a broader perspective and a focus on the benefits for people as end-users of the NQFs. Since the development of an NQF is not an end in itself, it is important not to focus solely on the technical details and design features and structures of the NQF, but above all to communicate and support its use as a reform tool, e.g. to facilitate

lifelong learning and increase the flexibility of learning pathways. This will require further coordination and discussion within the qualifications team. Although this approach has been followed for several years (e.g. with the published tools and manuals), the ETF does not seem to be as well known for its contribution in this area and more should be done to increase visibility in this respect. Moreover, flexibility, creativity and innovation from all cooperating organisations will be needed in order to address emerging topics in a joint way.

3.3 Impact and sustainability of ETF support to qualifications systems reforms

ETF activities leading to changes in partner countries' qualifications systems

The ETF activities have been considered effective in leading to changes in partner countries' qualifications systems. As shown in figure 3.2, 66% of the respondents saw a (very) high impact of ETF activities. More specifically, 60% of the respondents saw a (very) high impact of ETF activities on the reforms; 58% noticed a (very) high impact on the increased policy awareness for NQF developments and also 58% saw an increase in the stakeholder involvement. Slightly more than half (54%) noticed an increase of capacities of key stakeholders. The impact on transnational mobility and on the citizens in the countries is not as strong and many respondents do not know about the impact. Compared to the survey results of the *previous evaluation*³², the impact on reforming VET qualifications systems is rated much higher now. In 2014, 41% attributed a (very) high impact to reforming qualifications systems, in 2020 this is 60%. The challenge of reaching impact for end-users was identified in the country research for Kosovo, see the box below.

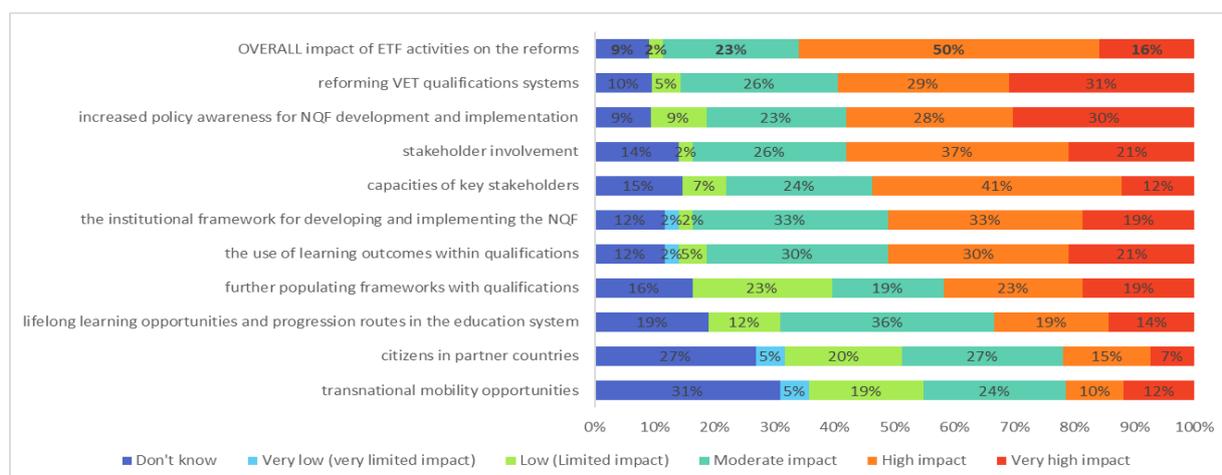
Kosovo

In the context of Kosovo, weakness is that ETF does not have a permanent presence in the country, limiting their interaction with national stakeholders and attending events. Furthermore, while the quality of ETFs policy support is undisputed, ETF might be limited in their powers when it comes to implementing this on the ground. This might lead to a certain gap, or interruption in the feedback loop, when it comes to informing ETFs policy advice with expertise from the implementation level. Finally, a weakness relates to the impact of the work on qualifications frameworks on the population, which seemed generally mixed. Since it was not clear how effective qualifications frameworks were, this would raise the questions whether ETF intervention would not better be provided elsewhere.

The survey findings above show how the ETF activities are assessed in terms of impact in supporting the reform of mechanisms, processes and frameworks. However, a complete understanding of impact should also cover the prospective end-users of qualifications services (both within institutions delivering reforms and as individual citizens accessing and benefiting from services). This was noted by several ETF staff, with one interviewee describing it as the difference between 'paper law versus actual law'. This is becoming more emphasised within ETF as well. The conference on 'Benefits for People shows an increased focus on end-users to understand the full impacts of reforms. In terms of this study, end-user impact analysis provides a different facet to our understanding of effectiveness in comparison to measuring the establishment of mechanisms and frameworks.

³² Buiskool, B.-J.; Broek, S. et al. (2014). Evaluation of Qualifications activities in ETF partner countries. Final report submitted to the European Training Foundation, Turin - December 2014. ICON-INSTITUTE GmbH & Co. KG Consulting Gruppe. https://www.etf.europa.eu/sites/default/files/2018-07/Evaluation%20of%20qualification%20activities_0.pdf

FIGURE 3.6 OVERALL IMPACT AND CHANGES THAT THE ETF HAS BROUGHT ABOUT IN THE REFORM OF PARTNER COUNTRIES' QUALIFICATIONS SYSTEMS



Source: Online survey (N=43)

ETF and linking countries to international developments

During the period 2014-2019 a range of activities were delivered by the ETF to connect partner countries with international developments. This is primarily direct bi-lateral country support by the qualifications team, and especially includes policy and methodology advice to link partner countries to the EQF and provide support to accession candidate countries. It also involves support in populating the NQFs with relevant qualifications and moving forward VNFIL practices. These activities can also include areas such as the development of EQF referencing reports and interventions to influence the revised 2017 EQF Recommendation and the third-country comparison clauses.

North Macedonia is an example of an ETF partner country where a significant effort was made to connect the Macedonian Qualifications Framework to international frameworks, in particular the EQF. An illustrative example of the range of activities that were implemented by the ETF is included in the box below.

North Macedonia EQF referencing activities

The EQF referencing project of ETF between 2014 and 2015 included awareness raising activities among a large group of stakeholders in a number of workshops and working meetings. The detailed activities and tasks involved are listed below:

- Support in the process of drafting and fine tuning the legislation covering the NQF;
- Support in defining the structures and organisation of the bodies for further development and implementation of the NQF;
- Support to developing the roadmap for referencing the MQF to EQF;
- Guidance and hands-on support to the process of drafting and review of the national referencing report;
- Capacity building of the relevant stakeholders (numerous workshops and capacity building sessions);
- Inventory of all existing qualifications and analysis of a sample of qualifications;
- Training and experimentation on revision of VET qualifications to describe them in learning outcomes;
- Levelling of a small sample of VET qualifications, based on learning outcomes;
- In 2015, upon invitation of ETF, the Polish Education Research Institute (IBE) ran two sessions on training and experimentation on revision of VET qualifications to describe them in learning outcomes, and hands-on levelling of a small sample of VET qualifications, based on learning outcomes.
- ETF project for preparation of the Inventory and analysis of existing qualifications and a Synthesis Report.
- Regional capacity building and peer learning activities related to the NQF. E.g. European Qualifications Framework (EQF): preparing for referencing and the Advisory Group and interactions with developments at national level – knowledge sharing initiative, Podgorica, end of September, beginning of October 2015;
- Conferences on NQF fora (e.g. ETF Conference: Getting organised for better qualifications, Brussels, 23-24 November 2016), other ETF fora.

An **inventory of all existing qualifications** was set up, which was considered a pioneer activity of ETF. This inventory and analysis of qualifications is considered one of the most valuable but at times also difficult pieces of work undertaken by ETF in the country. This work brought transparency on the existing situation, detailed the issues and created a simple but exhaustive database of all qualifications (all sub-systems). All EQF AG members had access to the report and the database and at the EQF referencing presentation Cedefop underlined that this

comprehensive report was a main factor why they considered the referencing acceptable (transparency, evidence).

The **EQF referencing report** was presented to the EQF Advisory Group in February 2016. The report was accepted and the referencing process considered completed. The Group raised some outstanding issues and questions and asked the country to address them within one year's time. The annex to the EQF referencing report contains a detailed list of ETF support activities related to the EQF referencing process undertaken between 2013 and 2015.

Based on the survey findings and the interviews (mainly at country level), the analysis shows that **ETF support is effective in linking partner countries to international developments**. The country research found that ETF support is effective in linking partner countries to international developments, although this is also driven by the context. In North Macedonia and Kosovo, the activities were considered highly effective by the interviewees, reflecting the focus that ETF paid on creating linkages in these countries (see box below). In Ukraine, there was more limited evidence of effectiveness as, while linkages had been made to international developments, these efforts had not led to such tangible progress as in other countries³³. The analysis found that effectiveness is also highly dependent on the relationships within countries. In particular, the effectiveness of bi-lateral support is linked to the quality of relationships with national stakeholders and the EU Delegation.

North Macedonia

The law on the Macedonian Qualifications Framework (MQF) for lifelong learning was adopted at the end of 2013 and its application started in September 2015. The MQF is a comprehensive qualifications framework that incorporates the qualifications framework for higher education and includes qualifications acquired through non-formal learning. It was referenced to the EQF and self-certified to the qualifications framework of the European higher education area (QF EHEA) in February 2016.

- 2014: Agreement with the Ministry of Education to start preparations for referencing the MQF to the EQF.
- 2014-2015: EQF referencing project, supported by the ETF. Awareness raising of a large group of stakeholders, inventory of all existing qualifications (ETF support piloted for the first time), participative elaboration and adoption by the Ministry of Education of the EQF referencing roadmap, drafting EQF referencing report.
- February 2016: Referenced to the EQF and self-certification to the qualifications framework of the European Higher Education Area (QF EHEA).

Kosovo

Kosovo adopted its NQF law in November 2008, supported by assistance from the EU and the ETF. Kosovo's qualifications framework (KQF) became operational in 2011. Formally and legally, it is well integrated into the national education and training system, and is considered a major reform tool. It was referenced to the European qualifications framework (EQF) in December 2016. It is coordinated and managed by the National Qualifications Authority (NQA).³⁴ The NQA was set up in 2009. The new Agency for VET and adult education, called the Agency for Vocational Education and Training and Adult Education (AVETAE) began work in the spring of 2014.

The KQF is an eight-level comprehensive framework that is based on learning outcomes. It has level descriptors defined in terms of learning outcomes covering three domains: knowledge, skills and wider competences. The KQF descriptors are similar to those in the EQF, but more broadly elaborated.³⁵

There is some evidence from the interviews that the ETF provides a range of linkages beyond NQF and EQF referencing that link partner countries to international developments. In particular, this can include QA processes, VNFIL, modernization of qualifications within countries and supporting countries in adaptations to new topics such as individualized and online learning. In particular, some of the common tools such as 'Qualifications Systems: Getting Organized' were identified as being a method of linking many partner countries to international developments. Of particular relevance is the fact that tools support countries more in the usage of qualifications systems rather than focusing solely on referencing. Another method of linking partner countries to international developments is through identifying and addressing common challenges, often supported through shared workshops, such as seminars with partner countries on Level 5 qualifications or workshops on the internationalisation of VET.

³³ It should be noted that Ukraine is not part of the EQF AG and cannot reference to the EQF and the ETF support is therefore unable to give the same tangible results as in the other countries. However, the register could be an effective tool if a comparison is possible at some stage.

³⁴ Cedefop (2019). Kosovo. European inventory on NQF 2018. https://www.cedefop.europa.eu/files/kosovo_-_european_inventory_on_nqf_2018.pdf, p. 2.

³⁵ Cedefop (2019). Kosovo. European inventory on NQF 2018. https://www.cedefop.europa.eu/files/kosovo_-_european_inventory_on_nqf_2018.pdf, p. 3.

Sustainability of the outcomes of ETF-supported activities

In terms of the sustainability of the outcomes of ETF-supported activities, the respondents were generally positive. 50% (21 respondents) indicated that effects or actions will definitely continue following end of ETF support; and another 50% (21 respondents) indicated a limited sustainability, meaning that some effects or actions will probably not continue following the end of ETF support. The survey respondents mentioned the following factors for sustainability: A vision-based approach, developed on the basis of international practice; the focus of local level capacity building; awareness of local context; organising national commitments; and the level of expertise of ETF staff. ETF country support activities have also prepared the ground for EU technical assistance (for instance the EU4Skills project in Ukraine³⁶). Another aspect of sustainability relates to working on NQFs in themselves. Establishing NQFs ensures that all stakeholders are continuously on board to discuss labour market, qualifications and educational issues. As a negative comment, one respondent indicated that ETF respects the interests of the ministries over the interests of all stakeholders.

The country research also provided evidence of the sustainability of ETF actions, as shown in the box below. In both cases, tangible outcomes (such as legislative reform, defined roadmaps or action plans, institutional reforms, or continuity funding programmes) have ensured that the qualifications systems reforms have the basis to continue sustainably.

North Macedonia

National stakeholders interviewed in particular emphasised that they consider the outcomes of the ETF intervention on qualifications systems reforms as **very sustainable**, also pointing to the fact that this is also thanks to continuous support provided since 1996. They in particular referred to the following outcomes that were considered particularly sustainable:

- EQF referencing report– considered as a lasting result;
- contribution to the development of the detailed roadmap on the implementation of the NQF;
- legislation on VNFIL adopted in 2019: ETF support for this considered vital and might not have happened without ETF intervention;
- quality assurance and continuous teacher training;
- work based learning and regional centres of excellence;
- support to the members of the EQF AG, DGVT, VET advisory group, working groups established with ET 2020.

Ukraine

The evidence gathered suggests that the outcomes of ETF intervention on qualifications systems reforms will be sustainable. Several factors indicate this.

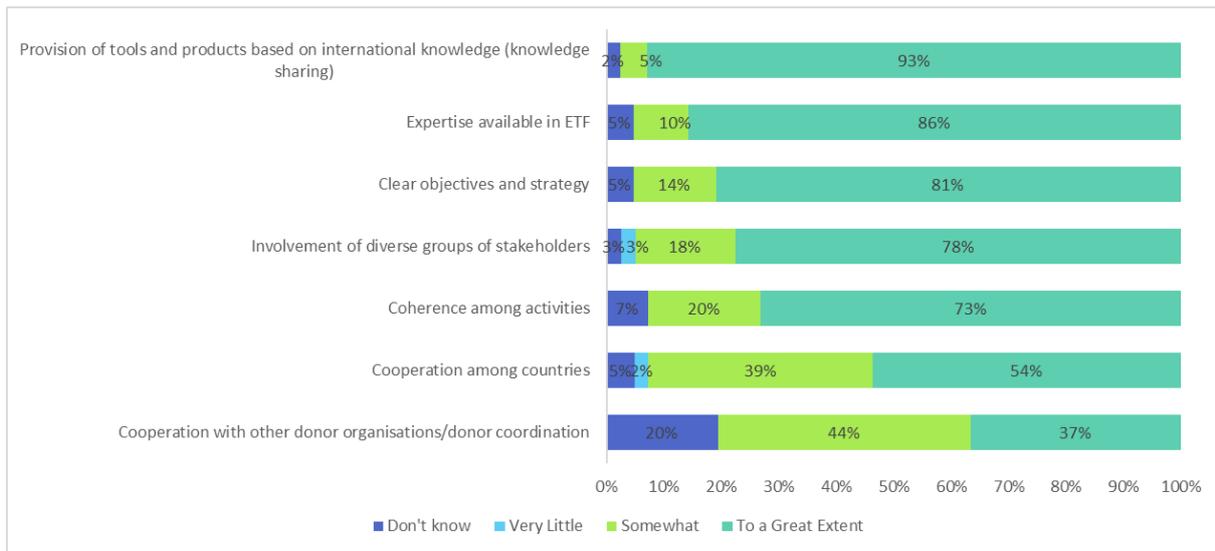
- Firstly, the Action Plan for Implementation for NQF (2020-2023), the Updated Action Plan for the National Agency for Qualifications for 2019-2025, and the Updated Strategy for the National Qualification System (NQS) 2030, were developed with support and inputs from the ETF. These will form the basis of the next phase of activities and the ETF will be monitoring the implementation of reforms. The Law on Education was passed in 2017, which also establishes the usage of the NQF.
- Secondly, funding will continue through the EU4SKILLS programme focused on VET reform, which includes a significant component for NQF and qualification system reform. UA-I3 noted that the pilots and conceptual/basis work of the ETF to operationalise the system were successful with the programme developed based on concepts and frameworks developed by the ETF, ensuring close alignment with ETF work undertaken so far.
- Thirdly, the EU-Ukraine partnership agreement now includes an explicit reference to linking the NQF to the EQF.
- Fourthly, ETF guidelines and training documents have been adopted, and will be used to support the next phase of implementation. Therefore, both the actions and effects of ETF support will continue. However, one interviewee did note that this could have limitations and did not see Ukraine as capable of implementing a full NQF.

Factors for success

There are a number of factors that are considered to play a positive assessment on ETFs effectiveness. The following figure provides the survey outcomes on factors for success.

³⁶ https://eeas.europa.eu/delegations/ukraine/66049/eu4skills-better-skills-modern-ukraine_en

FIGURE 3.7 FACTORS FOR SUCCESS OF ETF ACTIVITIES



Source: Online survey (N=42)

As illustrated by the figure, the most important factors are the **provision of tools and products on the basis of international knowledge**. The ETF is seen as an organisation that is able to provide relevant and tailored information and insights from an international perspective. Furthermore, **ETFs expertise** is also highly valued by the survey respondents. This relates both to the specific expertise in qualifications reforms and to the country-specific expertise. In North Macedonia, interviewees referred to the quality of expertise provided and the involvement of experts with technical expertise. In Ukraine, the technical knowledge and access to a network of local experts was identified as a core strength of ETF. As a related finding, the research found that the ETF is viewed positively and as an independent organisation that receives few criticisms. This reinforces the trust that stakeholders and partners have in the knowledge and support provided by the ETF. In addition, for respondents it is clear what ETFs objectives and strategy are. ETF is different from donors or development partners as **ETF plays a different, but recognisable, role** in the countries and is often referred to as a 'critical friend' and long-term friend. In North Macedonia the **long-term support and engagement** was directly cited as a key success factor. ETFs long-term engagement with the countries also enables them to be **flexible in providing support** as the interventions are not implemented with the straight-jacket of a project or programme (as is often the case with other partners). This flexibility is clearly demonstrated in Ukraine, where a decision was taken to prioritise resources to the country in response to a unique opportunity (a change in government, a new minister engaged in the topic, and a lack of other donor organisations working on VET reforms). This work later formed the basis of the Action Plan 2020-2023, supported by a new EU programme (EU4SKILLS), and would not have been in place had the ETF not identified and filled the gap in support. Other factors for success that were mentioned in interviews concerned **stakeholder engagement**, with interviews referencing the role of ETF in bringing together different stakeholder groups. The ETF is able to establish close co-operation with governmental bodies in partner countries and influence employer's engagement in reform. In the Ukraine country research, the involvement of a diverse group of stakeholders was identified as a key feature of ETF support. While this is an overall strength of ETF, and reflects the positioning of ETF as an independent advisor in partner countries, there is also a significant role for the personnel working in partner countries (such as country coordinators) that can enhance or limit this factor, especially due to the limited size of the qualifications team.

A final key factor for success is ETFs **cooperation with other (donor) organisations/donor coordination**. The analysis finds that cooperation with other (donor) organisations is very effective. In particular, country research findings, which undertook the most detailed

assessment of the collaboration between organisation, identified a strong collaboration with donors within the countries. In Ukraine, highly positive feedback on cooperation and donor coordination was identified by all external organisations interviewed. In particular, the linkages with ongoing EU programmes (EU4SKILLS) is an example of how the ETF can form contribute to other EU projects that have components on VET and qualifications reforms.

Hindering factors for success, within given financial limitations, relate to contextual and country specific circumstances (such as fragmented reform approaches, capacity limitations, inter-institutional conflicts, or a lack of political engagement) and the lack of continuity in staffing. The latter is particularly relevant for country support, as the effectiveness of interventions is often closely linked to the strength of in-country relationships that can take time to develop and are not easily transferred between position-holders. The internal ETF interviews also found that this was a concern within the qualifications team, with several highly experienced staff members having retired or left the team. This reduces the technical knowledge of the qualifications team within ETF and is recognised as a challenge to be addressed by both internal and external interviewees

4. Findings related to evaluation questions – looking ahead

4.1 Reflection on ETFs role in supporting the change mechanisms

It can be observed that the ETF strategy has oscillated between a more thematic and a more country-based direction several times throughout the years and the current strategy seems like an attempt to bring both directions together. However, this raises the question on how ETF will capitalise on the work done so far. As has been shown, the ETF has a lot of appreciation from partner countries in capacity building, this is part of the ETFs 'good standing', and it is questioned how this strength can be continued and what the core function of the ETF in the future will be.

Knowledge hub and policy advice

The ETF has the capacity to become a knowledge hub, as there is a critical mass of expertise within the organisation. However, in order to be recognised as a centre of expertise and to offer policy advice, detailed in-depth knowledge, insight and expertise is necessary (e.g. understanding of the drivers and agencies of change). Offering advice at a more general level will not be sufficient. This also means that the ETF will need to be one step ahead of those for whom they provide advice and a lot of research and analytical work needs to be done to ensure sufficient legitimacy. It is questionable as to what extent this will be possible without (at least to a certain extent) involvement in country level work, as monitoring and literature analysis is considered insufficient to achieve this. Another challenge will be to combine and link knowledge production and management with policy advice. This is not only relevant to the establishment of a database of sources and knowledge. The expertise and experience of people is crucial as well, alongside the modalities or formats for offering advice. Another challenge is to link policy advice to technical support that should be offered by other organisations. There are also concerns that the ETF will generally achieve less if they withdraw from technical assistance.

Tensions between the function of providing policy advice as well as diagnosis and assessment (and monitoring) were identified. It is questionable whether it is possible to be both a policy advisor and a monitoring body for in-country reform programmes. While monitoring activities offer a clear and integrated role in EU programmes, which allow the ETF to maintain a position of 'critical friend', they also limit the higher-level input that can be offered from the side of the ETF.

Country-based actions

The new positioning of qualifications work in the thematic project, supporting the 2027 strategy, raises a number of questions and could also lead to some risks related to the orientation to **country-based actions**. For example, to what extent will the reduced presence of the ETF in the partner countries (e.g. with the reduced budget for missions) have an impact on the relationship with local stakeholders and other organisations in the countries and on the level of familiarity with the country? How can close contact with experts and practitioners from partner countries be maintained with this new approach? There is a risk that without sufficient presence in partner countries and an on-going relationship with national stakeholders, the ETF will become another development partner and will no longer be recognised for having in-depth knowledge about the partner countries. Without ETF support through concrete actions within a country, they might not be able to help them achieve their objectives to the same degree as before. This might also have an impact on partnerships with other organisations in the countries. There is a fear that, with a reduced presence and without the technical support offered by the ETF, cooperation might disappear and a vacuum will form. Moreover, it needs to be considered that most donors follow a country-based approach (with GIZ being one of very few examples

of a donor that also shows elements of a regional approach) and that often programmes are country-based too. This offers ETF a unique position to work in a multitude of countries with a similar approach. Nevertheless, more cross-country action is also needed. The scope for countries to cooperate with each other could be further developed and countries might not have been sufficiently encouraged to engage in cross-country action in the past.

4.2 Reflection on the future topics within a broader thematic approach

This section summarises some current and future developments that can be expected to have an influence on the future work of the ETF related to the support of qualifications systems reforms.³⁷ It refers to the changes in the labour market and the required skill set to meet these developments, the changing conception of qualifications and the role of qualifications frameworks in this context and the potential responses to these challenges.

Jobs, skills and competences

Jobs, skills and competences required are influenced by global trends such as increasing migration, the globalisation of the labour market, the internationalisation of education and training, and the steadily increasing variety and availability of credentials. Considering the widely forecast and discussed changes in the labour market resulting from increasing uses of digital systems and artificial intelligence in different forms, it is important to also reflect on the kinds of skills and competences which are being forecast as the requirements for jobs in the coming decades and how these can be acquired.

While some recent studies suggest extreme disruptions and changes, others give a more balanced view. There is agreement, however, that the configuration of old and new skills and competences needed in the labour market (including transversal ones or so-called key competences or '21st Century Skills') can be expected to change more or less continuously in the future for most sectors. This has implications for individuals, employers and policy makers as it entails the need for re-skilling, upskilling and lifelong learning and, in turn, it raises the question of whether qualifications, as currently conceived of in many systems, can meet the future requirements of users.

Qualifications and other credentials

To meet the needs of different lifelong learners and to respond to the speed of change in skill requirements, it is likely that a more flexible approach to qualifications and a more diverse range of qualifications and other forms of credential will be required. Thus, within a qualifications system, the question is how, for example, qualifications designed for pre-employment skills development (e.g. for delivery in VET schools) might differ from those designed for continuing skills development (e.g. in dedicated occupational training centres) and how the differences and similarities would be signalled and built on. In the future, this question may also have to be answered in relation to digital credentials, including popular credentials from outside the national system. For example, existing international awarding bodies or new bodies have developed micro credentials which can offer certification for smaller amounts of learning and accredit skills and competences which may not be commonly found in traditional qualifications. They may also offer online assessment and digital badges which can effectively turn any organisation into an awarding body. Where it is successful, this new and disruptive technology may challenge and undermine national qualifications systems.

It is not clear how many national systems are adapting to this situation by developing smaller qualifications of their own and, of these, how many are online. For many national systems it would seem more efficient to find a way to live productively with the best of the new micro credentials, as, in the past, they have lived with international awarding bodies. In general, for the new micro credentials and digital badges to be successful, learners must find them valuable enough to claim and cite them. In addition, issues of broader management and trust

³⁷ The summary is mainly based on an expert input by Jonathan Hart specifically prepared for this report.

(which relates to both content and outcomes) need to be considered. To achieve good practice in recognising new online qualifications, some agreed criteria are needed to help identify and assure the essential quality of all qualifications and also these other forms of credential. Such criteria need to refer, for example, to transparency (intended learning outcomes) and assessment (achieved learning outcomes).

Qualifications frameworks and databases

Qualifications frameworks are now having to evolve to address the rapid technological, social and economic changes impacting the education and training sector, including the internationalisation of labour markets, digital technology innovations and expansions, and migration. The 2019 Global inventory of regional and national qualifications frameworks notes a number of trends within national implementation. We summarise some of the main features relevant to this evaluation below.

- Learning outcomes³⁸ underpin most European education and training systems as well as other highly developed economies around the world. Developing and transition countries in Eastern Europe, Southern Mediterranean, Africa, Asia and the Pacific are also taking up outcomes-based frameworks. Regional qualifications frameworks³⁹ and the World Reference Levels (WRL)⁴⁰ are using learning outcomes as the conceptual base and common language.
- However, some countries are struggling with weak coordination of stakeholders, insufficient sectoral cooperation, lack of adequate regulatory oversight, poor quality of training provision, insufficient opportunity for continuing professional development, and the uneven application of outcomes in curricula and qualifications.
- New systems and symbols of accreditation and credentialing are emerging in the day-to-day interactions between learners, workers and employers, with an increase of digital credentials that capture and recognise learning frameworks.
- Countries are also increasingly looking at linking frameworks directly to learners through information systems and tools and career guidance support, with a similar influence of outcomes as a central concept⁴¹.

While qualifications frameworks are instruments to organise qualifications, qualifications databases can communicate information about qualifications to the wider public. Such frameworks and databases usually refer to the formal qualifications system and traditional qualifications. *However*, developments in the private sector are likely to rival this in some respects. For example, PwC⁴² and IBM⁴³ are both working on blockchain and distributed ledger platforms with the potential to bring together a range of functions important to employers, job-seekers, and career-mappers. They can give control to a network of awarding bodies, enable individuals to take control of their qualifications and other forms of credential, and allow employers and institutional gatekeepers to verify what applicants are offering them. In addition, data generated by use of these platforms could be accessed by individuals to guide their career and learning plans, and by recruiting agencies and career advisers to help keep their services current.

The question then arises as to how these developments will affect the perceived value of traditional qualifications. How should national and regional qualifications relate to them and

³⁸ There are institutional risks with the use of learning outcomes, including institutional weakening and underestimation of the learning process. See: Allais, S., Raffé, D., Young, M. (2009) Researching NQFs: Some conceptual issues; Grootings, P. (2007) Discussing national qualification frameworks: Facilitating policy learning in practice in: ETF Yearbook 2007, Quality in Vocational Education and Training (Turin, European Training Foundation).

³⁹ The European Qualifications Framework (EQF) and ASEAN Qualifications Reference Framework (AQRf) are the two operational world region frameworks

⁴⁰ An emerging global tool to describe and compare the skills and qualifications of individuals that will shortly enter general use

⁴¹ Cedefop/ETF/Unesco/UII (2019a). Global inventory of regional and national qualifications frameworks 2019 – Volume I: Thematic chapters. http://www.etf.europa.eu/sites/default/files/2019-07/global_nqf_inventory_2019_vol_1_0.pdf, p.9

⁴² <https://www.ledgerinsights.com/pwc-blockchain-smart-credentials/>

⁴³ Starting initially with veterinarians: <https://www.asiablockchainreview.com/ibm-to-launch-blockchain-powered-platform-to-provide-credentials-to-vets/>

how inclusive is their orientation? Do national authorities have any leverage to offset any potential damage from popular or influential disrupters?

Inclusion qualifications work in broader topics

The expectation is that the new positioning of the qualifications-work will help to improve the dialogue between different thematic areas, e.g. between qualifications and provision, thus merging processes that are related to implementing the qualifications reform and the qualifications framework. This means that the work on qualifications, qualifications frameworks and related aspects will not disappear but be integrated into broader thematic projects (where they are not visible as a topic by themselves). Thus, the role of qualifications changes from being seen as an entry point into the policy discussions within countries or as part of overarching reform processes, to being used as tools to provide solutions or answer needs in a country.

While this is an important evolutionary step in the development of the organisation, there are concerns that with the new approach the institutional expertise related to the specific qualifications topic might get lost or that the expertise for this broader thematic approach is not yet there. Moreover, while the continuation and strengthening of the work on qualifications and qualifications frameworks is necessary (since additional measures need to be taken, for example, for building capacity, developing tools and social partnerships), there is a further need to discover new angles and new topics related to them. There is still a demand from countries for support in this area (e.g. to further develop qualifications frameworks, exchange views and experiences with other countries to ensure peer learning) and there is a need to contribute to the global and European level debates. New topics and developments that should be addressed in this context include the changing role of VET, the development of new (e.g. international) qualifications, emerging trends (such as digitalisation, digitally assigned certificates, micro credentials, blockchain, platform economies). There is also a need to reflect on how to address these aspects in the future and what role the Global NQF Inventory can play (e.g. should it also be opened up to include more cross-thematic aspects related to qualifications systems?). Moreover, the future role of the ETF as reference point for the work on qualifications needs to be reflected on.

4.3 Reflection on the cooperation with other organisations and extension of the geographical scope

In order to spend limited resources in a smart way, the ETF intends to build stronger links to larger projects in the partner countries. As the EU is the main donor in the partner countries, and increasingly more EU-funded projects are being implemented, the new ETF strategy involves focusing on the support of EU-funded projects (e.g. provision of input to Terms of Reference, provision of advice). For example: In Georgia, the ETF supported the EU Delegation in designing a Twinning project (e.g. designing the fiche, fine-tuning).; the work on the African Continental Qualification Framework is supported within a joint project of the EU and the African Union (partnership with DG DEVCO and pan-Africa); and in the Ukraine, the ETF supported the EU Delegation and the European Commission with the preparation, identification and formulation of the EU4SKILLS Project, with GIZ as the lead implementor (which began in July 2019), and will provide monitoring and policy advisory support to the delivery of the new programme.

It is of high importance to identify synergies between organisations and to present the ETF as a valuable partner who can contribute with the knowledge they have but there is still a need to clarify what specific role the ETF should play in EU projects in general (e.g. monitoring, observer without a decision-making role). How can better use be made of their insight, their institutional memory and sincere intention to help countries? There is the risk for the ETF of becoming an extension of the EU Delegation and losing corporate visibility. Moreover, although there is a strong agreement that cooperation between various supporting and donor organisations is important (including sharing knowledge and tools), the aspect of competition cannot be

ignored: all of these organisations want to be visible and recognisable. It also needs to be pointed out that it is unclear to what extent linking with the big projects of donor organisations can work in countries where there is less EU funding.

The cooperation with other organisations at international level is of crucial importance in the future to make best use of synergies. For example, the close cooperation between Cedefop and ETF needs to be continued in the future. The current joint work on a cyclical model of stages/indicators of NQF development (for impact assessment and comparison) is an example of how different ways of working can be brought together. While the ETF used to focus more on the policy process for developing NQFs, Cedefop put a stronger focus on their functionality and on operational aspects. Thus, the indicators used for assessing and monitoring their evolution differed to a certain extent. These distinct perspectives will now be brought together.

There is a tension between focusing on supporting countries that surround EU borders and in particular countries where there is a lot of movement (migration) to EU countries (e.g. from the Ukraine) and expanding to other geographic areas. The fact that the ETF is now also working in Sub-Saharan-Africa and supporting the African Union in the development of an African Continental Qualification Framework could be seen as an attempt by the ETF to extend their geographical scope. Another indication is the comparative study on Regional Qualifications Frameworks (RQF) from all over the world as part of ETFs support to the EQF Advisory Group and the project group on 'Comparison of third country frameworks with the EQF'. While this expansion makes sense since it means sharing knowledge beyond a small pool of countries, a further extension of the geographical scope requires not only commitment from ETF but also from the European Commission. Moreover, there are also risks involved. The risk for the ETF in expanding too much in geographical terms might be the loss of some of the specific expertise in core countries (that might possibly have an adverse effect on the quality of their work) and not having sufficient expertise in the new countries and regions. It can also be questioned as to whether the 'ETF methodology' (without a continuous presence in the countries) is the best way of supporting these countries (where institutional settings and capacities are very diverse) and whether these countries might actually need something else before setting up qualifications frameworks. Thus, it is important to consider that, as with the Global NQF Inventory, cooperation with other internationally operating organisations (such as UNESCO or ILO) is crucial in this regard.

4.4 Reflections on ensuring availability of expertise⁴⁴

The expertise of the ETF team working on qualifications system reforms is a crucial resource. The approach and role of the qualifications team is currently not very clear internally and not well documented. The qualifications team currently faces some challenges, on the one hand related to changes in the team and on the other hand related to their scope of work (focussing on the qualifications topic but integrating it into broader thematic projects). The changes in the approach of the ETF as well as the changes in the team will impact how the team works in the future. Thus, there is the challenge of transferring knowledge from the 'old' team to the 'new' team, as well as to the teams involved in the broader thematic projects. Internal in-depth knowledge and expertise needs to be secured and this is not something that can be achieved through a database alone. Planning needs to be done and a strategy needs to be developed on how the qualifications team can have a more structured approach to capture what has been done in a successful way and move ahead. Furthermore, a broader human resource strategy needs to be in place (that could refer, for example, to the establishment of mixed teams with newer and more experienced staff members working together to support knowledge transference).

⁴⁴ This section discusses the Q7: How can the ETF ensure that the investments to date will not disappear with the new approach?

5. Conclusions and recommendations⁴⁵

5.1 Conclusions

This section presents conclusions related to the main evaluation questions.

Conclusion 1 on the effectiveness of ETFs work on qualifications⁴⁶

ETF interventions had an impact on the development of partner countries' mechanisms, frameworks and processes for implementing reforms of qualifications systems. While each type of ETF action had its contribution and perceived added value, it is in the combination of ETF actions that impact is reached: strengthening stakeholders' capacities and providing knowledge, insights and advice based on practically-grounded international comparative analysis and tool development, within a cooperation context. For the future, the perspective of the end-user could be better integrated into ETFs work and new modalities should be explored more to actively engage stakeholders through cost-effective means (such as webinars, online workshops etc.).

There is substantial evidence that the ETF activities produce high impact in developing the mechanisms, frameworks and processes of partner countries to undertake qualifications systems reforms. This is also confirmed by the survey results, with 60% of respondents attributing a (very) high impact to reforming qualifications systems. This was the case for only 41% in the 2014 evaluation. ETF deployed a variety of actions of which their success and conditions for success are briefly discussed below.

A. The specific country support is an effective intervention for qualifications systems reforms and ETF is valued for the quality of its interventions in this area and its knowledge of the country-specific context. Qualifications systems reforms call for continuous country-level engagements and support. It is a technical topic in which many stakeholders need to be involved and (international) capacity building and sharing of expertise is needed to continue developments. As conditions under which this type of ETF support is most effective the following can be mentioned:

- The support needs to be provided in a flexible manner, being able to be adjusted when circumstances change;
- The support needs to involve local expertise to increase trust and relevance;
- The support needs to come as addition to developments owned by national stakeholders. The support should not take over responsibilities and the support is linked to larger programmes/projects (such as EU programmes);
- The capacity building is targeting to key 'change agents' and in synergy with what other partners do on capacity building;

B. The regional peer-learning activities are highly valued by participants as a means to develop a common understanding of the development of qualifications systems, provides opportunities to network with people from other countries and regional representatives, and exchange experiences with technical experts. Overall, the regional level activities are regarded as adding less value compared to the specific country support and the international support actions by ETF. A condition under which this type of ETF support is most I when activities bring together countries that are experiencing similar challenges and participants that are highly experienced and willing to be engaged in peer learning (and peer assessment).

C. The international level ETF activities, such as conferences, are highly valued and have been able to progress thematic discussions in qualifications systems reforms in the countries, but also contributed to international level peer learning and exposure to new ideas and developments. As a condition under which this type of ETF support is most effective it is mentioned that the topics addressed should be relevant and forward looking for national developments.

D. ETFs work to develop, monitor or evaluate EU interventions (support EU Delegation), is supported by the externally acknowledged high level of technical expertise of ETF on qualifications systems. This is closely linked to the long term-approach, contextual knowledge and stakeholder relationships that the ETF has in partner countries, which can be leveraged to support EU Delegations and to inform DG EMPL activities, such as the EQF Advisory Group. Collaboration between ETF and EU Delegations is considered effective, but there are tensions related to ETFs involvement (or not) in EU programmes: Is ETF a policy advisor involved in the design (and implementation) of EU programmes, or should ETF only be engaged as external monitoring agency and 'critical friend'?

⁴⁵ This chapter replies to Q8: What could be concluded from the summative and formative component and what could be recommended to further develop ETFs work on qualifications?

⁴⁶ These conclusions refer to Q2: How effective has the ETF been in developing and applying principles of qualifications systems reforms (through NQFs) and operationalising these principles in the partner countries? How did the ETF influence the qualifications systems reforms in the country?

E. The ETF thematic analysis and toolkits, including the Qualifications Platform /Open Space are valued for their practical applicability and combination of theoretical knowledge and practical understanding of how qualifications systems can be developed. As a condition under which this type of ETF support is most effective it is mentioned that the topics need to be relevant and linked to other (emerging) topics. For the Open Space, ground-work still needs to be done in terms of improving engagement and increase the attractiveness and relevance of content.

F. ETFs engagement with knowledge products and thematic analyses produced collaboration with other organisations contributes to the visibility and prestige of ETF in the international qualifications arena. As with the thematic analysis and toolkits, external organisations view the in-country knowledge and applied experience of ETF as specific expertise that is not available through other partners.

To be effective, **ETF needs all types of activities as they mutually enforce each other's effectiveness at partner country level. Together, the activities strengthen stakeholders' capacities and provide knowledge, insights and advice based on practically-grounded international comparative analysis and tool development, within a cooperation context.** This sets ETF apart from other organisations active in the area of qualifications that focus more on specific activities. While the specific country support is valued most by stakeholders, this can only be effective when it connected to ETFs knowledge development functions and regional understanding. ETF is different from development partners who focus on large scale project implementation and capacity building. The value of ETFs specific country support is that it is connected to the EU agenda and provided by ETF experts able to translate and situate new developments in the area of qualifications within the partner countries. This also applies the other way around. ETFs knowledge development work, development of practical toolkits, support to EU Delegations, and international/regional peer learning approaches can only be effective if ETF experts have a sound understanding of what is going on in reality in reforming qualifications systems in the partner countries. The combination of different types of activities also functions as ETFs solution for not requiring a permanent in-country presence as they can strongly engage with national stakeholders through a variety of country, regional and international level activities.

It is widely recognised that in order to achieve a higher impact of activities, there is a need to put more emphasis on the impact on end-users in further supporting reforms of qualifications systems. However, this does not mean that the interventions should focus directly on end-users and individuals, but that this perspective should be more strongly integrated into the policy advice activities. The ETF has followed this approach already for several years (e.g. with the published tools and manuals). This should be continued and since the ETF does not seem to be so well known for its contribution in this area, more should be done to increase visibility in this respect.

Online webinars and other lower-cost interventions may be better utilized and can be used as easily accessibly supplements to toolkits and knowledge products and be made available through Open Space.

Conclusion 2 on connecting partner countries to international developments ⁴⁷

ETF is widely viewed as knowledge resource on qualifications systems reforms and is viewed as a trusted partner connecting stakeholders in the partner countries with international / European developments. For the future, within the new positioning of the qualifications team, the qualifications work can be linked more strongly to other international developments in which qualifications play a facilitating role (for instance, social dialogue, work-based learning).

The ETF is valued for the technical knowledge, independent advice and contextual expertise that it provides for partners. The ETF is widely viewed as the main knowledge resource for

⁴⁷ These conclusions refer to Q3: To what extent has the ETF effectively applied and been able to connect partner countries with international developments and experience (including the EQF) to inform their qualifications system reforms?

qualifications systems reforms by external partners, with a particular basis of knowledge in leveraging international/European experiences into partner countries. Partners also explicitly value the combination of in-country knowledge and higher-level research and methodologies. In the international arena, the ETF is a well-known source of expertise and advisory support from all external partners and stakeholders.

The ETF is well-placed to bring together diverse groups of stakeholders, both in-country and internationally. The ETF is viewed within partner countries as a trusted partner who can leverage their long-term presence in partner countries to bring together stakeholders in order to support qualifications systems reforms.

However, working on qualifications is not only an aim in itself and is not only related to international developments such as the EQF and related NQF developments. Qualifications reforms facilitate changes in many other areas that relate to other international developments. They concern for instance, increasing the involvement of labour market stakeholders in VET (linked to improved social dialogue) or increasing emphasis on work-based learning (linked to Centres of Vocational Excellence – CoVEs) and the European Framework for Quality and Effective Apprenticeships – EFQEA). The new context, with the inclusion of qualifications work in broader thematic areas, could strengthen these cross-links but it needs to be ensured that ETFs qualifications work and valued expertise does not lose visibility.

Conclusion 3 on ETFs role in the international arena on qualifications⁴⁸

ETF is well connected with the international arena on qualifications, in particular through the cooperation with the European Commission, Cedefop and UNESCO and its own network of experts and organisations, including national and regional qualifications bodies, and online platforms. It is especially renowned for its hands-on understanding of developing qualifications systems and reforms and less known for its more theoretical or analytical work and identification of new themes. For the future, ETF could increase its future-topic orientation and further develop the Open Space platform as part of the knowledge-hub approach.

At the international level, the ETF-organised conferences and regional peer learning events are highly valued by partners as a facility for developing the approaches and wider discourse surrounding qualifications systems reforms. There are continuing challenges at the international and regional levels to overcoming differences in contextual and technical understandings of reforms, although some regions (Western Balkans) show progress in collaboration and co-learning.

The ETF is appreciated for their institutional knowledge on qualifications system in their partner countries and the tools they have developed. In the international arena working on qualifications, the ETF is seen as valuable partner because of this expertise. They cooperate bilaterally, in particular with Cedefop and UNESCO, and in a triangular relationship with both in various studies, with the Global NQF Inventory being the main common result. Their contribution to the international arena is, however, not so much based on theoretical studies and analytical work or on identifying emergent topics.

The online platform Open Space is at too early a stage to provide an evaluative assessment, especially as there are on-going changes to approaches and continual updates and developments of the platform. However, it is clear that there needs to be further focus on developing the platform in order to achieve its potential. In particular, impact should be considered, engagement of stakeholders should be expanded, correspondents and blogs should be emphasised, and the platform should be integrated into other knowledge hub activities rather than becoming the knowledge hub.

⁴⁸ These conclusions refer to Q4: What has been the effect of the ETF work in the international arena on qualifications? How has the online platform contributed and how will the transition to Open Space further support this?

Conclusion 4 on synergies between ETF and EU-funded and other donor-supported initiatives⁴⁹

ETFs work is complementary to the work of other partners and often leads to synergies. ETF vis-à-vis other partners has a specific and highly valued role to play. ETFs involvement with EU-funded initiatives also allows ETF to go beyond working in the partner countries (for instance in Africa). For the future, when working closely together on EU-funded programmes or with EU Delegations, further clarifications on the role of the ETF in relation to them are required.

The support offered by the ETF related to reforms of the partner countries' qualifications systems is generally consistent with various other ETF interventions in these countries related to the reform of their education, training and labour market systems. Generally, the ETF is considered as offering support that is complementary to the activities of other development partners in the partner countries, and having a specific approach that is differentiated from other organizations. Moreover, the evaluation confirmed that synergy between the ETF and partners on many related issues has been achieved to a wide extent.

Collaboration and coordination with partners is successful and is valued by all stakeholders. Within partner countries and internationally, the ETF is well-known and viewed as a strong partner, especially in terms of knowledge and expertise. As the ETF continues to collaborate with EU Delegations and EU-funded programmes in partner countries, there needs to be clear communication and further clarification of the objectives of the ETFs work in specific areas and what their specific role and contribution in relation to the EU-funded programmes is. In particular, the involvement as both policy advisor and independent monitor might need to be further reflected on and discussed with cooperating partners.

Conclusion 5 on the use of the context, mechanism outcome (CMO) approach⁵⁰

The CMO approach was valued for rationalising ETFs support in specific context and bringing together the outcomes of different ETF interventions. However, as a planning approach it is rather heavy and time consuming. For the future, general monitoring on qualifications systems development could be covered by existing initiatives (Torino process), while an approach to more in-depth assessment could be developed on the basis of the CMO experiences.

The CMO approach was recommended following the 2014 evaluation and systematically used by the qualifications team between 2015 and 2018. It was generally appreciated as it helped to plan and structure interventions in the countries and monitor progress. Since 2019, with the restructuring of the ETF approach and changes in the team, it has been used less and its suitability in the new context is now questioned. However, the development and use of a similar (but less detailed and more scaled-down) tool for joint planning of ETF interventions that can monitor progress in the countries and assess impact would also be useful for the current thematic approach. This does not necessarily require the invention of a completely new instrument, but could be inspired by other existing tools, such as the 'Country Progress Indicators' (CPI), which monitor reform progress in the countries, or the cyclical model currently being developed for monitoring the development and implementation of qualifications frameworks. However, this would require connecting ETFs interventions to indicators that are able to track whether ETF interventions facilitate change.

⁴⁹ These conclusions refer to Q5: To what extent has synergy and coordination with EU-funded and other major donor-supported (e.g. WB, GIZ) projects in the partner countries been achieved?

⁵⁰ These conclusions refer to Q1: Assess the evolution of the ETF work on qualifications by taking stock of the use of the CMO approach.

5.2 Recommendations⁵¹

With the change in operations in 2019 (from strategic projects to a broader thematic approach) and the new ETF strategy 2027 with its three functions (policy advice; diagnosis, assessment and monitoring; knowledge hub), the positioning of the qualifications team in the ETF has changed. In addition, there might be further changes in terms of how specific country support and regional activities are designed and provided. However, this does not mean a radical shift, but rather an opportunity to rethink the approach and seize the opportunities that arise. In particular, there is now scope to better link the qualifications work with other topics, to improve the future orientation of support with a view to identifying and studying emerging trends and qualification-related issues, and to establish more links with international developments and international organisations. In this context, the following recommendations are made.

Recommendation A: Mainstream qualifications work throughout all ETF work and establish closer links with other themes (such as social dialogue, work-based learning, lifelong learning), as the qualifications work forms the basis for good governance, quality delivery and robust skills anticipation systems.

The work on qualifications is linked to many other reform topics (such as social dialogue, work-based learning etc.). The positioning of qualification work within the broader themes enables a qualification-related input into these themes. Qualifications and qualifications frameworks will still be important topics in the future. However, a qualifications framework is an instrument and not an objective in itself. A qualifications framework should clearly serve a purpose and have an impact and benefits for individuals. It is important not to focus too much on the instrumental character of these (often rather technical) tools, but to reflect on the role of qualifications frameworks in the wider context. While the development of qualifications frameworks and systems is sometimes seen as reducing the focus on more urgent (institutional) issues in developing countries, it is clear that the qualifications system development and the respect of the principles underlying qualifications frameworks (e.g. learning outcomes approach, permeability, lifelong learning) support the development of future-proof education and training systems relevant to all age groups.

The ETFs efforts have supported partner countries in establishing National Qualifications Frameworks and in continuing to develop functioning qualifications systems. The work on these frameworks and systems paved the ground for further reforms to improve skills development systems in the countries. In this context, developing qualifications systems is fundamental to ensure long-term engagement of labour market stakeholders in governance; to bring education and training closer to the world of work; to facilitate work-based learning; to increase flexibility in how learning outcomes are realised and obtained; to improve permeability; to reduce dead-ends in the education and training system; and to make education and training system more age-neutral.

ETFs qualifications work relates – as a transversal topic – to the full range of topics covered in ETFs strategy for 2027; contributing to better skills anticipation systems; better skills development delivery; and better lifelong learning and governance systems. Linking qualifications more closely to other topics strengthens ETFs holistic, coherent and comprehensive approach to skills development in the partner countries, linking them to a variety of international developments. For this reason, the qualifications work should be taken on board in all other ETF work as it provides a clear conceptual foundation to situate discussions on other topics in a wider (system) context.

⁵¹ This chapter replies to Q8: What could be concluded from the summative and formative component and what could be recommended to further develop ETFs work on qualifications? The recommendations also refer to the following evaluation questions: Q6: How best should the ETF shape its work and where should the ETF focus its efforts in the new context of the knowledge hub, where there is a shift away from a country-based logic to a policy advice logic and that the bulk of our country-based actions will pass through cross-country actions? / Q7: How can the ETF ensure that the investments to date will not disappear with the new approach?

Recommendation B: Maintain diverse types of activities and find new modes of working on qualifications in the countries, covering policy advice, diagnostics, and knowledge hub activities, and link them closely to ensure synergies and mutual enforcement of effectiveness.

The evaluation concluded that by applying a wide range of different activities, the ETF is effectively able to strengthen the capacity of stakeholders and provide knowledge, insights and advice based on practically-grounded international comparative analysis and the development of tools, in a collaborative context. In this way, the ETF supports countries to further develop their qualifications and qualifications systems. Furthermore, ETF is widely recognised as a centre of expertise and this recognition is based in the ETFs ability to combine analytical, conceptual work with practice-oriented know-how and capacity development.

Hence, in order to maintain the legitimacy of being a centre of expertise that is able to offer practice-oriented advice and capacity development, ETF should maintain the different types of activities, including specific country work (policy advice) and diagnostics (monitoring) focusing on qualifications systems development. Furthermore, in terms of modes of working, existing ones could be strengthened and new modes could be identified. Aspects where improvements could be made include the following:

- 1) **Use new ways of sharing knowledge**, such as webinars⁵², 'ask an expert' sessions or other ways of distance/online knowledge sharing (including a better structured digital platform). For example, one feature of the Open Space could be to share standards, especially occupational standards, with other countries. Many countries struggle in developing new or revised qualifications and have a very limited understanding of what is available elsewhere. Sharing examples between countries could massively reduce development times and speed up processes. Using the Open Space in this way might also attract a more active group of practitioners.
- 2) **Invest a bit more in the presentation of ETF reports** which are often densely written, with few figures and graphs. Moreover, new technologies should be better used to promote their work. Although a lot has been done already in this regard, more effective communication of the role and contributions of the ETF in this regard is needed.
- 3) Establish a **community of ETF international experts** of those who have frequently cooperated with or contributed to ETF activities, possibly with a certification process (based on experience and expertise, contribution to ETF activities and events). This community could build on the existing informal network and contacts established through events and work in partner countries.
- 4) Further exploit the potential for **cross-country action**. ETF should encourage countries to engage in more cross-country actions (such as sharing experiences and expertise in peer-learning activities) and to initiate schemes on their own. Moreover, connecting partner countries with international and EU developments should be strengthened. For example, non-EU and EU countries could be connected by facilitating contacts between agencies and key stakeholders, facilitating access to donor support, and supporting national (and possibly international) networks of experts.

⁵² The ETF qualifications team has started organizing webinars already in 2017 in Central Asia and they plan to offer more webinars in the future.

Recommendation C: Strengthen the ETFs capacity to be a forerunner and the global go-to-place for qualifications-related work, both in terms of experience in developing, implementing and renewing qualifications (and qualifications systems); and in identifying and analysing emerging trends and developments, particularly in the context of the COVID-19 pandemic.

ETF is widely regarded as a knowledge resource and centre of expertise. This entails continuously striking a balance between specific country work, regional-level work and international-level work. In order to maintain legitimacy as a centre of expertise, ETF should maintain some orientation on gaining and maintaining detailed in-depth knowledge, insights and expertise within partner countries (traditionally an ETF asset and appreciated by its partners) and avoid shifting away from country-based actions. This also means that the ETFs role as a centre of expertise should be more prominently featured than its function as a knowledge hub, in which ETF has more of role as a facilitator of a 'community' that generates insights and knowledge and feels its own responsibility to share this with others.

The ETF needs to be at the forefront of developments in order to be able to support partner countries. The ETF should therefore be able to identify and work on emerging issues proactively and provide quick information and guidance to the partner countries on how they can deal with the nascent topics. This could, for example, concern the redesign or reorganisation of national systems to take advantage of as many of the benefits of new technologies as can reasonably be achieved, particularly in the context of the COVID-19 pandemic (see box below).

The global lockdown caused by the COVID-19 pandemic represents a huge challenge for education and training systems⁵³. Some provision has been able to offer simulated environments, live recordings and online assessment, including for work-based learning. In general, the current crisis has pointed to a need for ensuring the resilience of education systems. Thus, in the light of the COVID-19 pandemic, the OECD⁵⁴ has developed recommendations for building 'resilient VET systems', including the following:

- Capitalise on the demand for digital distance offerings by exploring options for innovative, digital pedagogical approaches such as simulators, augmented/virtual reality, or artificial intelligence. VET systems should take advantage of any increases in funding that may be available in their respective countries to build infrastructure that can be used in the long term.
- Examine policies and regulations with regard to the awarding of micro-credentials and digital badges to ensure that progress made in the offering of VET at a distance can be appropriately rewarded with qualifications in a timely and effective manner.

While the qualifications topic will continue to be relevant in the future, the exclusive focus on qualifications work is probably not the 'gold standard' for addressing future needs. In the response to the challenges ahead, a balance between change and continuity will need to be found. While the bodies responsible for designing, delivering, assessing and accrediting the outcomes of education and training are facing constant and disruptive change, the responses required often involve continued attention to existing issues (such as the need for lifelong learning and flexible pathways), but with changes in practice in order to address them. New topics and developments which should be addressed include:

- The changing role of VET;
- The development of new (e.g. international) qualifications;
- The implementation of qualifications registers as a quality assurance and transparency tool;
- Qualifications registers as a tool for informing end-users;

⁵³ A number of country responses were reported at a UNESCO-run COVID-19 Webinar (Thursday 7 May, 2020), entitled 'Skills development during the COVID-19 pandemic and preparing for recovery'.

⁵⁴ OECD (2020). VET in a time of crisis: Building foundations for resilient vocational education and training systems. https://read.oecd-ilibrary.org/view/?ref=132_132718-fdwmrqsgmy&title=VET-in-a-time-of-crisis-Building-foundations-for-resilient-vocational-education-and-training-systems-, p. 7.

- Identification and response to emerging trends (digitalisation, digitally assigned certificates, micro credentials, blockchain, platform economies).

The impact of these developments on qualifications systems, learning pathways and recognition procedures needs to be continuously considered and a long-term vision for qualifications, qualifications systems and frameworks should be developed to keep pace with changes. Related activities have already started, not least with the 'Creating new learning' initiative. The ETF should therefore build the capacity to ensure its global leadership in this field and in identifying new trends and developments and to ensure the acquisition of practice-oriented knowledge and experience in working with the partner countries.

Recommendation D: Develop guidelines on how ETF can be involved in the work of EU Delegations and in EU-funded programmes. These guidelines should identify different options ranging from providing technical assistance to external monitoring and evaluation.

The conclusions show that the ETF is valued as a development partner, in particular for its level of expertise and long-term engagement with the partner countries. With regard to the ETFs relationship with EU-funded programmes and the EU Delegations, there are occasional challenges related to the role the ETF plays. The ETF takes on different roles depending on the requests from national stakeholders and policy officials involved in EU-funded programmes and EU Delegations. These roles can include: Providing thematic expertise and advice for the design of interventions (projects, programmes); providing advice in the implementation of (parts) of the interventions; and monitoring services. Whilst the ETF can provide these services in the future, the ETFs role and how this role relates to the actions of development partners active in each partner country should be clarified. A specific case is ETFs involvement with the work on the African Continental Qualifications Framework supported within a joint project of the EU and the African Union (partnership with DG DEVCO and pan-Africa). While this is a good opportunity for ETF to showcase its expertise in the area of qualifications, ETF might also be regarded by development partners more as a technical assistance agency working in countries where it has limited expertise.

Hence, ETFs role might differ depending on the context. Without pre-scribing what ETFs role should be, guidelines could be developed that indicate what roles ETF could have and what that means in terms of arrangements, responsibilities and reporting lines. Without this clarity, the roles can easily become confused, leading to a false perception of ETFs role.

Recommendation E: Provide targeted monitoring services to countries where ETF works directly on qualifications (through policy advice or in EU-funded programmes) and reduce the resources used for general monitoring of all partner countries' NQF developments.

While monitoring qualifications across all countries is valuable, this exercise is also resource intensive and takes up the time of the qualification team members. Parts of this exercise should be integrated into general monitoring and assessment services of ETF so that resources become available for conducting more targeted monitoring and assessments services in countries in which ETF is actively involved, or where EU/MS developing partners have a particular interest in monitoring and assessment.

As many countries have established systems in previous years, there is a need to develop ways that do not only identify changes but also measure the impact of support activities on individuals and their pathways. The impact of the interventions could be monitored and analysed by applying an adapted ('lighter') CMO approach or a new tool. The new approach could be based on the logic of the CMO, the country progress indicators (CPI) and the progress indicators of NQF development and implementation (cyclical model) that are currently being developed in cooperation with other organisations. One option could be to revise the CPI and

to adapt them for the use across thematic areas within the scope of the new intervention logic. Thus, they could be used for the qualifications work that is integrated into the thematic projects but also to monitor the progress made related to other aspects. In addition, the cyclical model could be used for more detailed monitoring of the progress made related to the NQF development and implementation in partner countries and documented in the Global NQF Inventory.

5.3 Action points

In implementing these recommendations, the following structures need to be put in place:

An ETF organisational model that ensures a culture of strong coordination and cooperation across different themes and services, allowing experts to focus on the areas where they add most value.

Without being able to say exactly how the work of the qualifications team is embedded in the ETF organisation in the future, it is clear that the issue of qualifications should be integrated into all (or most) areas of ETF activity and covered by all three services (knowledge hub, policy advice and monitoring and evaluation). As concluded, the ETF is the most effective at facilitating change through the totality of its activities (including specific country work).

It seems most appropriate that the focus of the team working on qualifications will be on the knowledge hub service (or better, serving as centre of expertise). In this context, it is essential that other ETF teams, services and activity areas are well aware of the (potential) contribution of qualifications work for their services to the partner countries. This relates to ensuring that ETFs work on policy advice and on monitoring and assessment significantly takes into account insights from the qualifications work; but also that other activity areas (lifelong learning, career guidance, enterprise skills development, skills anticipation, work-based learning etc.) are able to take on board expertise and insights from the qualifications team. Furthermore, the qualifications team should pro-actively establish thematic links between qualifications and other activity areas in identifying emerging trends and developments.

An ETF human resource strategy that ensures continuity in staffing and creativity.

Maintaining the expertise of the ETF team working on qualifications system reforms is a crucial aspect in ensuring that the investment to date will not disappear. This is very important with regards to the generational change that will affect the team in the new programming period. This should be addressed by the development of a strategy for the work within the qualifications team as well as a broader human resource strategy across the thematic projects. This strategy should also ensure that the institutional expertise related to the specific qualifications' topic does not get lost and that expertise for the broader thematic approach can be developed. Moreover, it should ensure that the necessary capacity for creativity and innovation can be improved. This should be further supported by appropriate organisational structures for ensuring that the ETF is sufficiently flexible and agile when addressing emerging issues.

An approach to identify emerging trends and development and responses to COVID-19 and to maintain a global leader position in qualifications.

In order to maintain the position of a global centre of expertise on qualifications, ETF needs to strengthen its ability to develop insights in emerging trends and developments that in a practice-oriented manner inform stakeholders in the countries. This is especially valid in the context of the current COVID-19 pandemic where countries seek assistance and guidance in how to adapt their skills development systems to the new environment. The approach to identify topics and develop insights in emerging trends and developments should include the following aspects:

- Devote team-members' time to investigate specific emerging topics and draft opinion pieces or other deliverables that stimulate debate and position the ETF as a thought leader when it comes to knowing what developments will be important for partner countries.
- Establish discussion fora for stakeholders on emergent and relevant trends on the Open Space platform to learn from the qualifications community which aspects they consider interesting to explore.
- Publish the results of the various ETF actions at national, regional and international level (in various forms, including Open Space) and highlight the qualifications aspects in publications on other issues.

An ETF approach (guideline) for working with EU Delegations or EU/MS programmes and projects.

To clarify ETFs role in working with EU Delegations and EU/MS programmes and projects, the ETF could develop an overall approach defining different modalities of engagement and their respective consequences in terms of cooperation arrangements; governance; reporting and communication. Broadly speaking, three modalities could be explored:

- Modality 1: ETF is involved as a critical friend of the EU Delegation or the EU/MS programme; is contributes to programme/project design and functions as broker between programmes/projects and national stakeholders.
- Modality 2: ETF is responsible for the monitoring and assessment of the implementation of the programme or project, for mapping the current state and also the progress of development.
- Modality 3: ETF joins the implementation and is responsible for a specific set of activities or services.

A two-pronged approach to monitoring: regular collection of general information and in-depth monitoring and assessment.

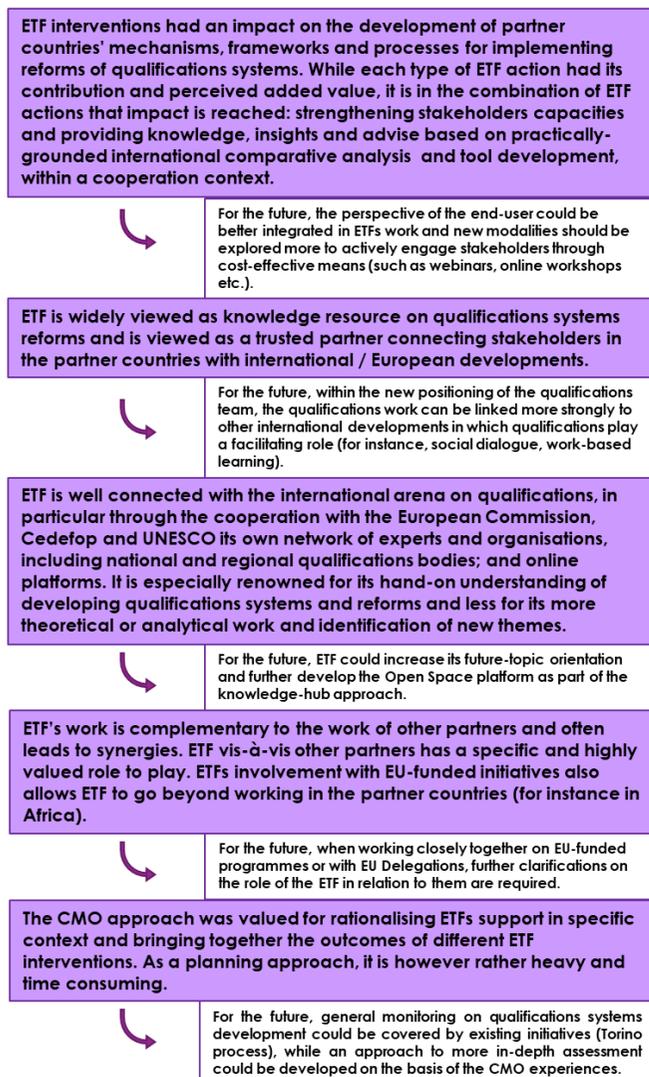
General level monitoring at the level of the implementation of qualifications systems is already integrated into the overall monitoring of countries' progress with regard to skills development systems (Torino Process). In addition to this monitoring at general level, a more targeted monitoring and assessment approach should be developed to assist countries (or EU Delegations, programmes and projects) – on request – to critically assess the state of development of their qualifications systems, to map the progress achieved and finally to propose the way forward. This monitoring and assessment approach could be inspired by the tried and tested CMO approach and include country self-assessment, data analysis and additional interviews.

5.4 Overview of conclusions, recommendations and action points

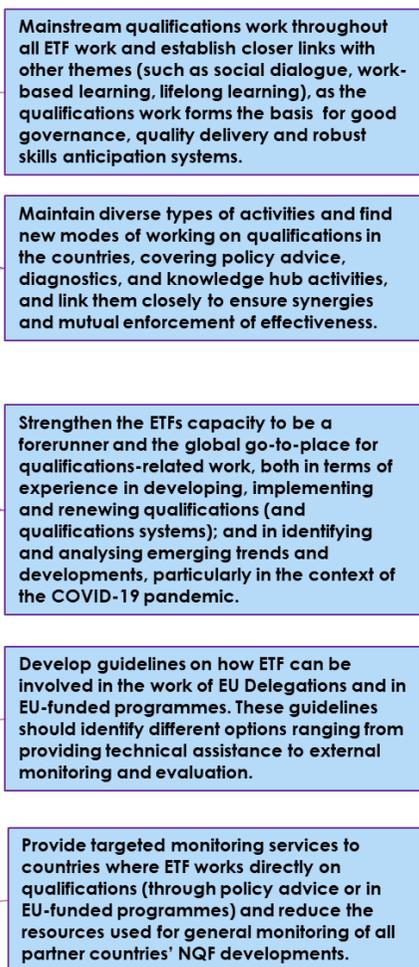
The following figure provides an overview of the links between the conclusions, recommendations and action points.

FIGURE 5.1: OVERVIEW CONCLUSIONS AND RECOMMENDATIONS

Conclusions



Recommendations



Action points: structures to put in place



Annex 1: Stage of development for partner countries

As background for discussing the effectiveness of ETFs interventions, it is important to provide an indication of the state of development in the partner countries and the change and progress achieved in the period 2015-2019.

Stage of development related to qualifications systems reforms

The partner countries have been working on qualifications frameworks and systems for some years. As presented in the Global Inventory report (2019, Volume II), the partner countries show on average a medium compliance with the EQF or other international developments related to qualifications frameworks (such as QF-EHEA) and a low-to-medium impact on end-users (see table below).

TABLE A1.1 LEVEL OF COMPLIANCE WITH EQF AND IMPACT ON END-USERS

	Compliance with EQF or other international best practices			Level of impact on end-users		
	Low	Medium	High	Low	Medium	High
Western Balkans						
Albania		X			X	
Bosnia and Herzegovina		X		X		
Kosovo		X			X	
North Macedonia			X		X	
Serbia		X			X	
EEP						
Azerbaijan		X			X	
Belarus	X			X		
Georgia		X				X
Moldova	X			X		
Russia		X			X	
Ukraine	X				X	
SEMED						
Morocco	X			X		
Palestine	X			X		
Tunisia		X				X
Turkey			X			X

Source: Global Inventory 2019, Volume II

As can be seen above, there is a very strong regional effect concerning the **compliance with EQF**. The Western Balkans countries are in general much further advanced in compliance with international frameworks and standards than partner countries in other regions. The main driver for this is the role that EU accession and candidate status play in reforming qualification systems. Indeed, the analysis showed that countries in the Western Balkans are much more integrated into EU frameworks and processes, including the EQF Advisory Group, the Bologna Process, the Torino Process and the European Higher Education Area.

Other regions are less advanced. In the majority of countries, there is some evidence of linkages. For example, in Morocco there is a Roadmap for Implementation (2008) that includes the objective of fostering the approximation of the Moroccan NQF with the EQF and in Belarus there is a framework and road map to align to QF-EHEA. However, tangible progress is less evident in these countries. In Turkey, clear progress has been made, and the EQF referencing to the TQF was completed in 2017. Again, it should be noted that Turkey is an EU candidate country as with the Western Balkans countries.

This all suggests that the linkages to EQF and other international best practices are highly influenced by the wider contextual priorities of countries, in particular whether they are EU candidate countries and are therefore more likely to prioritise system alignment. One ETF interviewee mentioned that referencing is becoming less important when compared to systems in partner countries and that most partner countries are not involved in the EQF. Other regional initiatives are in discussion or development but are far less coordinated and advanced than those related to a highly formalised EU accession process. In these cases, activities are

more effective when focussed on supporting systems reforms rather than building international linkages. As is discussed further below, effectiveness within countries is highly related to the partner country context.

Concerning **impact on end-users**, regional effects are mixed, with Western Balkans being the region with the most consistent responses (medium impact) although no countries report a high-impact on end-users. In EEP and SEMED regions, there is a more varied response which again shows that there is less regional consistency. This is consistent with the assessment of interviewees, who identified stronger regional linkages in the Balkans compared to other regions. In particular, the progress in North Macedonia allowed relevant documents and tools to be shared in the region. For countries that report low impact, the reason is primarily that the qualification system and NQF are neither established or operational. In medium-impact countries, the status is principally that the mechanisms and frameworks are established (at least in some areas) but that few end-users are currently being reached. For example, in Kosovo there is 'not yet a wide and tangible impact on end-users' but 'it is expected that the NQF-EQF referencing process will have a wider economic and social impact in the near future'⁵⁵. Similarly, in Ukraine end-users are limited but expected to grow substantially over the coming five years. Other countries only provide information on the status of the mechanisms and frameworks. North Macedonia reports that the NQF is 'technically operational' but provides no further data on end-users. In Russia, tools and instruments are operational and arrangements for quality assurance (QA) and validation of non-formal and informal learning (VNFIL) are being developed⁵⁶. For high-impact countries, there is reported uptake of usage by end-users. Turkey reports that 387,000 national vocational qualification certificates had been issued to individuals by August 2018 by authorised certification bodies/VOC-Test centres that assess, evaluate and certify skills for individuals⁵⁷.

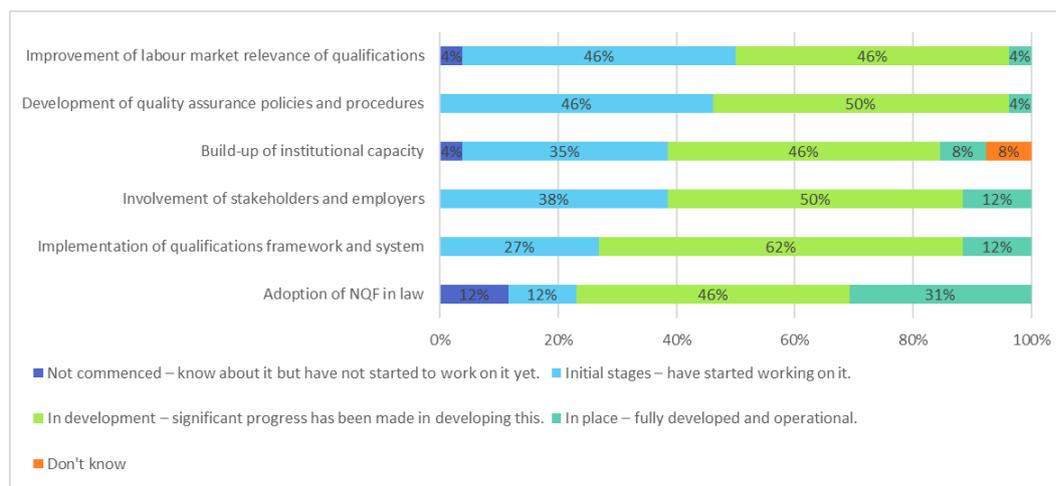
Compliance with the EQF or other international developments in qualifications and impact on end-users is not the only aspect to assess the stage of development. Developments can take place in terms of the adoption of NQF in law; implementation of qualifications framework and system; the involvement of stakeholders and employers; the build-up of institutional capacity; the development of quality assurance policies and procedures; or the improvement of labour market relevance of qualifications. When asked in the survey to self-assess the stage of development in relation to qualifications-related topics (see Figure 3.1), it is clear the adoption of an NQF in law is the most advanced (31% in place) and that the improvement of the labour market relevance of qualifications and the development of quality assurance policies are either in initial stages (both 46%), or in development (resp. 46% and 50%).

⁵⁵ Global Inventory Report Part II (2019): p.332

⁵⁶ Global Inventory Report Part II (2019): p.534

⁵⁷ Global Inventory Report Part II (2019): p.644

FIGURE A1.1 THE CURRENT STAGE OF DEVELOPMENT IN RELATION TO THE QUALIFICATIONS-RELATED TOPICS



Source: Online survey (N=26)

When looking separately at the countries overall and for all topics, for most countries the stage of development can be assessed as being 'in development, seeing significant progress'. The table below positions the countries based on the responses of the survey participants.

TABLE A1.1 COUNTRIES' STAGE OF DEVELOPMENT IN RELATION TO THE QUALIFICATIONS-RELATED TOPICS

	Adoption of NQF in law	Implementation of qualifications framework and system	Involvement of stakeholders and employers	Build-up of institutional capacity	Development of quality assurance policies and procedures	Improvement of labour market relevance of qualifications
Not commenced – know about it but have not started to work on it yet.	(2) Bosnia and Herzegovina, Israel			(2) Armenia, Serbia		
Initial stages – have started working on it.	(1) Armenia	(2) Albania, Armenia,	(4) Albania, Armenia, Azerbaijan, Israel	(1) Albania	(5) Albania, Armenia, Azerbaijan, Serbia, Ukraine	(4) Albania, Azerbaijan, Serbia, Ukraine
In development – significant progress has been made in developing this.	(8) Albania, Azerbaijan, Kyrgyzstan, Moldova, Russia, Serbia, Turkey, Ukraine	(10) Azerbaijan, Bosnia and Herzegovina, Israel, Kyrgyzstan, Moldova, North Macedonia, Russia, Serbia, Turkey, Ukraine	(7) Bosnia and Herzegovina, Kosovo, Kyrgyzstan, Moldova, Russia, Serbia, Ukraine	(9) Azerbaijan, Bosnia and Herzegovina, Israel, Kosovo, Kyrgyzstan, Moldova, North Macedonia, Russia, Ukraine	(8) Bosnia and Herzegovina, Israel, Kosovo, Kyrgyzstan, Moldova, North Macedonia, Russia, Turkey	(9) Armenia, Bosnia and Herzegovina, Israel, Kosovo, Kyrgyzstan, Moldova, North Macedonia, Russia, Turkey
In place – fully developed and operational.	(3) Kosovo, Montenegro, North Macedonia	(2) Kosovo, Montenegro	(3) Montenegro, North Macedonia, Turkey	(2) Montenegro, Turkey	(1) Montenegro	(1) Montenegro

Source: Online survey (N=26)⁵⁸

Countries such as Montenegro, North Macedonia, Kosovo and Turkey seem to have the most processes in place. For North Macedonia and Kosovo, this is confirmed by the findings from the case studies: Kosovo adopted its NQF law in November 2008 (in force since 2011) while the law on the Macedonian Qualifications Framework (MQF) for lifelong learning was adopted end of 2013 (in force since 2015). Both countries, as part of the EQF implementation process, presented their referencing report to the EQF Advisory Group in 2016. In terms of implementation, both countries have started to include qualifications levels on diplomas and certificates, and have developed databases of qualifications. In both countries, more recent activities in particular focused on the development of arrangements for the validation of non-formal learning.

⁵⁸ In case respondents from the same country made a different assessment, the more advanced/positive category is selected.

Countries such as Bosnia and Herzegovina, Armenia, Albania, and Azerbaijan many processes have not started or are in the initial stages. Countries such as Israel, Serbia, Ukraine, Kyrgyzstan, Moldova, Russia present a middle category with the most processes in development.

Stage of change and the progress achieved in the period 2014–2019

The stage of development related to qualifications reforms does not provide an indication of changes and the achievements in the period 2014-2019. This section provides an overview of the recent developments. Countries differ in terms of the stage of change in whether reforms of the qualifications system have actually been translated from words into action. Based on the survey results the following classifications are provided:⁵⁹

- **Policy discussions:** Where discussion or debate is taking place about change, but there are as yet no clear plans for a policy or implementation. This stage of development can be found in Albania and Armenia;
- **Policy:** Where the direction is set, perhaps through a law or a high-level decision, but there are as yet no clear plans or strategies for implementation. This stage of development can be found in Azerbaijan, Israel, Kyrgyzstan, Moldova, Serbia and Ukraine;
- **Implementation:** Where the infrastructure to make change happen is in place and arrangements such as a leading organisation and funding arrangements have been decided on. This stage of development can be found in Bosnia and Herzegovina;
- **Change in practice:** Where pilot schemes and full-scale implementation mean that providers or other stakeholders are taking policy through to the final stage, which is full implementation. This stage of development can be found in Kosovo, Russia and Turkey;
- **Effect:** Where the new system brings benefit to learners, stakeholders, organisations or society, and where reform or policy change can be evaluated. This stage of development can be found in Montenegro and North Macedonia.

The grouping is broadly similar to the stage of development classification. The largest group of countries can be found in the category of 'policy', meaning that in relation to qualifications and qualifications systems, the policy directions are set, but that there is only limited progress in implementing policies and plans. In only a few countries, the qualifications reforms lead to visible change in practice and effects to learners, stakeholders, organisations and society. Even though survey respondents linked North Macedonia to the 'effect' stage, the case study found no hard evidence as such for this development. No systematic evaluation of NQF use or impact has yet been carried out. But there is some 'soft evidence' that points in this direction:

The following developments can be observed in North Macedonia:

- The NMQF and register have been populated with qualifications⁶⁰.
- Qualifications levels are indicated in the qualifications register, and on Europass diploma supplements. Work is ongoing to include information on levels on qualification documents for all qualifications in the NMQF.
- According to the 2018 Inventory on NQF, the NMQF has influenced to a large extent the promotion of the learning outcomes approach; the review, renewal and quality assurance of qualifications; and dialogue and cooperation between stakeholders across education and training sectors and between education and the labour market.
- The NMQF now forms an integral part of the qualifications system. The Education strategy for 2018-2025 and Action Plan strongly emphasises the further implementation of the NMQF and the learning outcomes approach in various areas.⁶¹

Yet, further work and more time will be needed to operationalise the learning outcomes approach. In addition, insufficient interest of employers to become more involved in NMQF implementation remains a challenge.

This evaluation focusses on the period 2014-2019. The figure below provides an overview of the extent to which the respondents identified progress on qualifications-related topics. In this period, the main progress achieved is found in the adoption of NQFs in law. Substantial progress

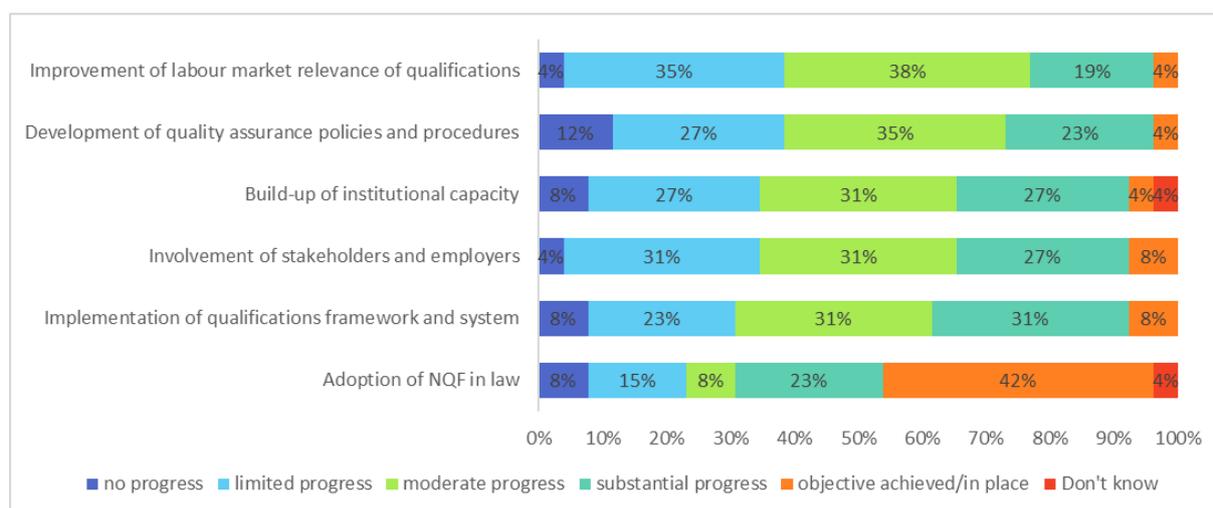
⁵⁹ Online survey (N=26)

⁶⁰ <http://registar.mrk.mk/>

⁶¹ <http://mrk.mk/wp-content/uploads/2018/10/Strategija-za-obrazovanie-ENG-WEB-1.pdf>

(or more) is identified in relation to the implementation of qualifications frameworks (31%+8%); involvement of stakeholders (27%+8%) and the build-up of institutional capacity (27%+4%). No progress is only indicated by a few respondents and is most prominent in relation to the development of quality assurance policies and procedures.

FIGURE A1.2 PROGRESS ACHIEVED IN THE PERIOD 2014–2019 IN RELATION TO QUALIFICATIONS-RELATED TOPICS



Source: Online survey (N=26)

On this point, it is more useful to look at the countries separately. For most topics, the largest group of countries have indicated that there is moderate progress in 2014-2019. This is different for the adoption of NQF in law, here a group of eight countries indicates that the objective is achieved. Substantial progress is also commonly selected when it comes to the implementation of NQFs and build-up of institutional capacity (see Table 3.2).

TABLE A1.3 COUNTRIES' PROGRESS ACHIEVED IN THE PERIOD 2014–2019 IN RELATION TO THE QUALIFICATIONS-RELATED TOPICS

	Adoption of NQF in law	Implementation of qualifications framework and system	Involvement of stakeholders and employers	Build-up of institutional capacity	Development of quality assurance policies and procedures	Improvement of labour market relevance of qualifications
no progress		Armenia		Armenia		
limited progress	Armenia, Bosnia and Herzegovina	Bosnia and Herzegovina	Armenia, Azerbaijan	Bosnia and Herzegovina, Moldova	Armenia, Azerbaijan, Ukraine	Azerbaijan, Ukraine
moderate progress		Albania, Azerbaijan, Israel, Russia, Ukraine	Albania, Bosnia and Herzegovina, Israel, Kyrgyzstan, Moldova, Serbia	Albania, Azerbaijan, Israel, Kyrgyzstan, Ukraine	Albania, Bosnia and Herzegovina, Israel, Kyrgyzstan, Russia, Turkey	Albania, Armenia, Bosnia and Herzegovina, Israel, Kosovo, Moldova, Serbia, Turkey
substantial progress	Albania, Israel, Kyrgyzstan, Russia	Kosovo, Kyrgyzstan, Moldova, Serbia, Turkey	Kosovo, North Macedonia, Russia, Turkey, Ukraine	Kosovo, North Macedonia, Russia, Serbia, Turkey	Kosovo, Moldova, North Macedonia, Serbia	Kyrgyzstan, North Macedonia, Russia
objective achieved/in place	Azerbaijan, Kosovo, Moldova, Montenegro, North Macedonia, Serbia, Turkey, Ukraine	Montenegro, North Macedonia	Montenegro	Montenegro	Montenegro	Montenegro

Source: *Online survey (N=26)*⁶²

The ETF staff interviews identified that there have been a range of outcomes in progress achieved in the partner countries and ETF regions. One staff member identified that, in particular, the Balkan countries have benefited from a solid base of work and regional linkages that are not in place for SEMED countries. As is shown in the table above, the Balkan countries (except for Bosnia and Herzegovina) are highly aligned in reporting moderate or substantial progress towards objectives in most categories. This is consistent with the findings of the 2016 External Evaluation of ETF, which found that there was especially noticeable progress in the SEET countries in terms of new legislation, methodologies, and qualifications taking a higher position in the qualifications' agenda⁶³.

⁶² In case respondents from the same country made a different assessment, the more advanced/positive category is selected.

⁶³ McCoshan, A., Ruitinga, C., Curtarelli, M. (2016), External Evaluation of the European Training Foundation (ETF). Final Report by the EFECTIV Consortium., p.66

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Annex 3: Stakeholders consulted

Organisation	Date
ETF staff	
ETF Operations Department	14.02.2020
ETF Operations Department	26.02.2020
ETF Operations Department	04.03.2020
ETF Operations Department	10.03.2020
ETF Operations Department	11.03.2020
ETF Operations Department	18.03.2020
ETF Operations Department	24.03.2020
ETF Operations Department	27.03.2020
ETF Operations Department	15.04.2020
Other organisations	
UNESCO	15.05.2020
Cedefop	28.04.2020
European Commission – DG EMPL	21.04.2020
WorldSkills	15.04.2020
ILO	08.04.2020
ILO	24.03.2020
EBRD	25.03.2020
Case study Ukraine	
ETF Operations Department	17.04.2020
EU Delegation	30.04.2020
Donor organisation	07.05.2020
Ministry of Education and Science	13.05.2020
Case study North Macedonia	
ETF Operations Department	27.04.2020
ETF Operations Department	07.05.2020
Ministry of Education and Science	12.05.2020
Ministry of Education and Science	18.05.2020
EU Delegation	04.06.2020
Case study Kosovo	
ETF Operations Department	17.04.2020
National Qualifications Authority	15.05.2020
Donor organisation	21.05.2020
National Qualifications Authority	28.05.2020
Employment Agency	27.05.2020

Annex 4: Selection logic for the field missions (country case studies)

	Planned budget for qualifications systems reform support (EUR)					Selection or exclusion justification
	2015	2016	2017	2018	Total	
Western Balkans						
Albania	35.000	55.000	55.000	55.000	200.000	Excluded as Albania was included in the latest WBL evaluation (with Montenegro)
Bosnia and Herzegovina	45.000	45.000	20.000	23.000	133.000	Reducing expenditure in recent years. BiH is understood to be operating in a very complicated environment involving multiple ministries. This makes the country too challenging for the purpose of this evaluation.
Kosovo	25.000	20.000	20.000	39.000	104.000	Rising level of expenditure in most recent period and country now starting from an early stage of development.
North Macedonia	50.000	60.000	50.000	24.000	184.000	Consistent expenditure and high level of activity in first 3 years.
Serbia	40.000	75.000	32.000	2.000	149.000	Very low expenditure in 2018 , with budgeted activities almost stopping.
EEP						
Azerbaijan	25.000	12.000	30.000	-	67.000	1 year with no budget allocated.
Belarus	15.000	15.000	-	-	30.000	2 years with no budget allocated.
Georgia	30.000	13.000	-	31.000	74.000	1 year with no budget allocated.
Moldova	20.000	31.000	40.000	18.000	109.000	Ukraine selected as regional choice due to the scale of activity and size of budget.
Russia	10.000	-	-	-	10.000	Budget allocated only for 1 year
Ukraine	30.000	45.000	173.000	252.000	500.000	Highest level of cumulative expenditure on qualifications support in study period.
SEMED						
Israel	-	-	-	-		No budget allocated
Morocco	50.000	60.000	70.000	14.500	194.500	Covered in the previous evaluation. Planned activities did also not take place in certain years due to an absence of political will to work on qualifications. This makes it challenging for the evaluation to gather information on the role ETF played.
Palestine	25.000	-	-	-	25.000	Budget allocated only for 1 year.
Tunisia	-	-	-	-	-	No budget allocated.
Turkey	-	-	-	57.000	57.000	No budget allocated for 3 years.

Data sources: Annual Implementation Plans (2015, 2016, 2017, 2018)

Annex 5: Survey questionnaire