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Policy pointers to enhance **Estonia's skills anticipation** and governance system



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Foreword

The Estonian economy and labour market has developed over the last five years within a complex European landscape shaped by geopolitical uncertainties, emerging AI and demographic transitions. These shifts have profound implications for skills demands, placing continuous pressure on education and training systems to ensure that the supply of knowledge and skills keeps pace with changing requirements.

Addressing skills shortages and mismatches has become a fundamental structural challenge that EU Member States must overcome to ensure long-term sustainable development. This urgency is at the heart of key EU initiatives – including the European Skills Agenda, the Pact for Skills and the Union of Skills – which advocate collective action and strengthened skills intelligence to support inclusive and adaptable systems.

Estonia has been proactive in responding to these challenges with investment in a coordinated skills anticipation system, the prioritisation of skills within the country's long-term development strategy and numerous other practical reforms. To advance Estonia's skills anticipation framework, the Estonian government requested European Commission support under Regulation (EU) 2021/240 establishing a Technical Support Instrument, managed by the Reform and Investment Task Force (SG Reform). The resulting project, 'Strengthening skills forecasting and skills governance system in Estonia', was launched in December 2024.

The project is implemented by Cedefop in cooperation with the Estonian Ministry of Education and Research and the European Commission. It strengthens the capacity of the nationwide System of Labour Market Monitoring and Future Skills Forecasting (Oskuste Arendamise Koordinatsioonisüsteem, OSKA) to inform policymaking, education and labour market responses within a rapidly changing socioeconomic environment. By engaging with local, regional and sectoral stakeholders, the project builds consensus on strategic investments to ensure that Estonia's skills governance effectively guides policymaking, education and labour market responses.

This report presents policy pointers identified through the project to provide strategic directions for the future development of OSKA and Estonia's wider skills governance system. Grounded in the evidence collected through desk research, stakeholder consultations, peer learning activities and comparative examples from other countries, these pointers are intentionally indicative rather than prescriptive. Their purpose is to support discussion among stakeholders and provide a basis for future reform planning, prioritisation and sequencing. The analysis presented in this report may also be inspirational for other countries or regions with skills governance reform aspirations.

Jürgen Siebel
Cedefop Executive Director

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The project is managed by the Cedefop experts [Jasper van Loo](#) (department coordinator) and [Stelina Chatzichristou](#). [Susanna Coghlan](#), Cedefop support expert, also contributed to the report.

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Executive summary

Skills anticipation and governance in Estonia

Addressing shortages of people and skills in a rapidly changing labour market is challenging. Alongside education and training systems that are relevant and responsive to the labour market, multistakeholder governance arrangements that link various policy areas and ambitions (economic, social, environmental, innovation and other) are crucial. More systemic and holistic skills governance approaches, which build on social dialogue and integrate state-of-the-art skills intelligence, are gaining ground. Countries across Europe increasingly acknowledge the value of skills anticipation as a strategic and transversal policy decision tool.

Improving the match between labour market needs and the supply of skills in the population is a policy priority in Estonia. The [Estonian education strategy for 2021–2035](#) aims to support the objective of equipping the population of Estonia with the knowledge, skills and attitudes that prepare people to fulfil their potential in personal, occupational and social life. This document also sets out key educational goals that contribute to achieving the objectives of [Estonia 2035](#), the country's long-term development strategy.

[Recent reforms of the education and training system](#) have focused on improving the supply of economically valuable skills. Practical measures adopted include increasing the flexibility and learner-centredness of vocational education and training curricula, enhancing the alignment of education pathways, promoting more individualised learning paths and revising the criteria for payment of tuition fees. These policy shifts aim to strengthen the skills formation system, but their effectiveness depends on the ability to identify what skills are needed, by whom and in which sectors and regions.

The country has in recent years invested in a holistic and coordinated skills anticipation system. The System of Labour Market Monitoring and Future Skills Forecasting (Oskuste Arendamise Koordinaatsüsteem, OSKA), funded primarily by a European Social Fund grant, was established in 2015 to better coordinate skills anticipation activities. OSKA is Estonia's established [system of skills anticipation](#) (Cedefop, 2020). OSKA, coordinated by the Estonian Qualifications Authority ([Kutsekoda](#)), combines quantitative and qualitative approaches to identify current and future labour and skills demand. It supports both labour market policymaking and planning in the education and training system.

Although much has been achieved since OSKA was established, the efforts undertaken so far, while relevant and targeted, have not fully exploited skills governance improvement opportunities in Estonia. There are untapped opportunities to further strengthen coordination, cooperation and collaboration across the whole of government and with other relevant stakeholders (sectoral, regional and local). Another limitation of the existing OSKA system is that due to data limitations it is more relevant in the context of formal education – especially vocational education and higher education – while its applicability in the context of non-formal education, for example leading to microcredentials, is considered more limited.

Overview of the research project

Estonia requested support from the European Commission under [Regulation \(EU\) 2021/240 establishing a Technical Support Instrument](#) (European Parliament, & Council of the European Union, 2021). The project 'Strengthening skills forecasting and skills governance system in Estonia' was launched in December 2024 and will conclude in December 2026.

The project is implemented by Cedefop in cooperation with the Estonian Ministry of Education and Research and the European Commission, and it is delivered through the Technical Support Instrument

under the management of the Reform and Investment Task Force (SG Reform) (European Parliament, & Council of the European Union, 2021). The overall objective of the project is to support the further development of Estonia's skills anticipation and governance system, centred on OSKA, to more effectively inform policymaking, education and training provision, and labour market responses in a rapidly changing economic and social context. This report presents policy pointers identified through the project up to the end of March 2026. These pointers provide strategic directions for the future development of OSKA and Estonia's wider skills governance system.

The findings and policy pointers in this report are grounded in a robust, mixed-method research and stakeholder engagement process conducted between December 2024 and March 2026. Initial activities focused on mapping Estonia's current skills landscape, evaluating existing governance structures and identifying potential new contributors to the skills anticipation system. This baseline assessment was reinforced by targeted qualitative research, including dedicated occupational case studies of nurses and human resources professionals to dissect the underlying drivers of specific skills shortages and determine how skills anticipation can mitigate these challenges.

To ensure the policy pointers are both practically viable and aligned with international best practices, the methodology incorporated extensive national and international validation. Domestically, evidence-gathering workshops and detailed stakeholder interviews were conducted in Tallinn to co-design future paths for skills intelligence. Internationally, a peer-learning workshop facilitated knowledge exchange with leading foreign institutions, including [Austria's Arbeitsmarktservice](#), Luxembourg's [Agence pour le développement de l'emploi](#) and [SkillsFuture Singapore](#). Furthermore, Cedefop coordinated a strategic study visit by 10 Estonian officials to Ireland's further education and training authority ([An tSeirbhís Oideachais Leanúnaigh agus Scileanna](#)). By synthesising these deep-dive country comparisons with domestic stakeholder insights, the report establishes a rigorous, evidence-based foundation for its short-, medium- and long-term policy recommendations.

Policy pointers

While OSKA already provides a strong institutional basis for skills intelligence, the project identifies opportunities to strengthen the integration and use of labour market data, improve the timeliness and usability of outputs, support regional and sectoral decision-making more effectively, and strengthen links between skills intelligence, curriculum development and flexible learning provision. In this report, these opportunities are addressed through six interconnected policy areas that provide the foundation for strengthening Estonia's skills anticipation and governance system. These policy areas reflect both the existing strengths of OSKA and the changes required to ensure that the system remains relevant and effective in a rapidly changing labour market environment. The findings suggest that the next stage of development should focus on enhancing the usability, responsiveness and policy relevance of skills intelligence, while preserving the methodological robustness and stakeholder trust that underpin OSKA's current success.

The policy pointers provide strategic directions for the future development of OSKA and Estonia's wider skills governance system. Some could be implemented relatively quickly through organisational or procedural adjustments, while others would require longer-term investment in data infrastructure, governance arrangements, digital systems or analytical capacity. Together, however, they provide a pathway for gradually strengthening OSKA's ability to support policymaking, education and training provision, workforce planning and lifelong learning in Estonia.

1. Improving the uptake of OSKA's findings in policy and practice

- **Key policy pointer 1.** (Re)identify or prioritise the key stakeholders/users OSKA is meant to serve. It may be the case that, in the short term at least, OSKA is best placed to serve some groups more than others. This prioritisation is important because it helps shape the data/indicators OSKA needs to prepare (or assists with their prioritisation).
- **Key policy pointer 2.** Undertake market testing to identify the data that policymakers – inside and outside government – require, how often those data need to be provided (periodicity) and how they can be best disseminated to those groups (e.g. through dashboards). There may be lessons to be learnt from organisations such as SkillsFuture Singapore, which provides a one-stop shop of sorts for skills anticipation data for various users.

2. Strengthening data quality and integration

- **Key policy pointer 3.** Undertake a data audit (with reference to key policy pointers 1 and 2) to identify data gaps / datasets not incorporated within OSKA and identify the importance of the data that might be obtained from the analysis of these data; assess the added value these data sources will provide and the costs and benefits of developing the means to acquire the information.
- **Key policy pointer 4.** Ensure that data provided in reports and dashboards are easily interpretable by their intended users.

3. Enhancing methods and timeliness

- **Key policy pointer 5.** Develop the means to produce shorter-term prognoses (indicatively one to three years' time horizon) of the changing demand for skills – and the resulting levels of skills mismatch – so that the messages from OSKA are timely. This is likely to include a mix of quantitative and qualitative methods to ensure that data and findings are relevant to the current needs of the labour market.

4. Broadening stakeholder engagement

- **Key policy pointer 6.** Identify which groups are under-represented and how they might be incorporated in the OSKA system, and by what tools/methods. It is also important to identify which stakeholder groups are best suited to contribute to the various functional activities within OSKA.

5. Developing a regional dimension

- **Key policy pointer 7.** Learn from how similar countries have sought to provide and visualise regional labour market skills intelligence. Ireland and Austria provide examples, as do other countries such as Finland.

6. Ensuring OSKA's medium-term sustainability

- **Key policy pointer 8.** Provide recurrent medium- to long-term funding of OSKA. Ultimately the sustainability of OSKA is not just down to funding. If OSKA is to satisfy the high demand for labour market skills intelligence, then the policy pointers provided above cannot be viewed in isolation. They are all interlinked. This leads to the final policy pointer.
- **Key policy pointer 9.** The sustainability of OSKA over the medium term is dependent upon it being able to satisfy an increasing demand for labour market skills intelligence. This is dependent upon it fulfilling the various interconnected information needs and dissemination plans outlined above, in cooperation with partners and other stakeholders.

Introduction

This report synthesises findings of the project ‘Strengthening skills forecasting and skills governance system in Estonia’, up to the end of March 2026. The project is implemented by Cedefop in cooperation with the Estonian Ministry of Education and Research and is delivered through the Technical Support Instrument under the management of the Reform and Investment Task Force (SG Reform) (European Parliament, & Council of the European Union, 2021). The overall objective of the project is to support the further development of Estonia’s skills anticipation and governance system centred on [Oskuste Arendamise Koordinatsioonisüsteem](#) (OSKA) to more effectively inform policymaking, education and training provision, and labour market responses in a rapidly changing economic and social context.

Estonia has established a strong foundation for skills anticipation. OSKA is widely recognised as a well-developed and credible system that combines quantitative and qualitative approaches to identify current and future labour market needs. It has contributed to improving the evidence base for policy discussions and to strengthening dialogue between key stakeholders, including ministries, employers, social partners and education providers. At the same time, the changing nature of work, technological change, demographic pressures and the growing importance of lifelong learning are placing new demands on skills intelligence systems.

Against this background, the project aims to assess how OSKA can be further strengthened to enhance its relevance, usability and impact (see Box 1 for methodology). In particular, it focuses on how skills intelligence can better support policymaking, funding decisions, and the planning and delivery of education and training provision, including both formal and non-formal learning. It also looks into how the system can become more responsive to short- and medium-term labour market developments, more accessible to a wider range of users and more integrated with emerging tools and data sources.

Box 1. Project methodology

The Technical Support Instrument project ‘Strengthening skills forecasting and skills governance system in Estonia’ was launched in December 2024. Initial activities mapped Estonia’s current skills landscape, including current stakeholders and potential new contributors who could play a role in skills governance in the future. Desk research also pointed to key opportunities to leverage skills intelligence in various domains.

A fact-finding workshop in Tallinn and stakeholder interviews took place to explore future paths for Estonia’s skills intelligence system.

Case study interviews with nurses and human resources professionals analysed skills challenges and shortage drivers in these occupations.

A peer learning workshop facilitated learning from experiences of other countries. Approaches to skills anticipation and the integration of skills intelligence with education and training were presented from Austria’s Arbeitsmarktservice (AMS), Luxembourg’s Agence pour le développement de l’emploi (ADEM) and SkillsFuture Singapore.

Cedefop facilitated a study visit by 10 Estonian officials to An tSeirbhís Oideachais Leanúnaigh agus Scileanna (SOLAS), the state agency responsible for further education and training in Ireland. The sessions showcased initiatives aligned with Estonia’s skills governance interests and stakeholder needs, facilitating practice exchange and mutual learning between counterparts in the two countries. By combining the findings of these sources, Cedefop identified a set of policy areas and policy pointers upon which policy actions in the short, medium and long terms can be based. In the next stages of the project, the policy pointers will be validated and elaborated by stakeholders, through an online

survey and direct consultations. Their feedback will be used to refine an action plan to solidify OSKA's role in skills intelligence that could support its long-term sustainability.

A stakeholder capacity-building workshop (November 2026) and the final project event (December 2026) will take place in Tallinn.

Source: Cedefop.

This report is structured around a set of key themes that reflect the main challenges and opportunities identified during the project. These are:

- (a) improving the uptake of OSKA findings in policy and practice;
- (b) strengthening data quality and integration;
- (c) enhancing methods and timeliness;
- (d) broadening stakeholder engagement;
- (e) developing a regional dimension; and
- (f) ensuring OSKA's medium-term sustainability.

The findings presented in this report draw on a combination of complementary sources of evidence including desk research, a round-table discussion with OSKA stakeholders and skills anticipation practices from other countries. These findings are then translated into key policy areas and policy pointers that OSKA would benefit from addressing. The policy pointers will help establish the basis of an action plan that Cedefop will develop to strengthen OSKA's role as a key resource for skills anticipation and labour market intelligence and safeguard the long-term sustainability of the initiative.

EU and national contexts of the analysis

The Estonian economy and labour market have developed over the last five years within a European context, marked by geopolitical uncertainties, the increasing adoption of AI by enterprises and governments, demographic changes and ageing societies. These factors have significant implications for the demand for skills. Additionally, the education and training systems face pressure to ensure that the skills supply keeps pace with demand. Equipping young people with knowledge and skills that support the successful transition from school to work and providing adults with opportunities for upskilling and reskilling that can ensure their skills are up to date and relevant to the available jobs. There is also a social dimension, insofar as a failure to acquire skills with economic value in the labour market can affect the level and extent of social exclusion.

Skills shortages and mismatches are key structural challenges that EU Member States face and must address to ensure long-term sustainable development (Brunello et al., 2019; Cedefop, 2022). The urgency of promoting skills relevant to the labour market and of enabling the green and digital twin transitions has been at the core of past and ongoing initiatives at the EU level. This includes the [European Skills Agenda](#) (European Commission, n.d.-a), which calls for collective action and the strengthening of skills intelligence, emphasising that skilling for a job requires national skills strategies that involve all stakeholders; the [Pact For Skills](#) (European Commission, 2023), which brings together various stakeholders in a shared engagement model for skills development; the European [Year of Skills 2023](#), which placed skills at the core of the EU social agenda; and, more recently, the [Union of skills](#), which emphasises the significant role of skills intelligence initiatives to ensure the strong support for effective and targeted policies that strengthen the quality, inclusiveness and adaptability of education, training and skills systems. These initiatives are financially supported at the EU level, and in the Member States, by the [European Social Fund Plus for 2021–2027](#) (European Commission, n.d.-b), the main instrument for investing in skills and inclusive labour markets, and by the [Recovery and Resilience Facility](#) (European Commission, n.d.-c), a major driver of labour market and skills reforms and investments, including those related to skills governance.

Cedefop has systematically catalogued the provision of skills anticipation systems across the EU over several decades and advised on how these can be improved so that they comply with (and surpass) what might be considered best practice by international standards (Cedefop & UNESCO-UNEVOC, 2025; Cedefop, 2021a; b). At the same time, the European Commission has made substantial investments in the capabilities of Member States to undertake skills anticipation, often with the support of European Structural Funds.

The Estonian [education strategy for 2021–2035](#) (Ministry of Education and Research, n.d.) aims to support the objective of equipping the population of Estonia with the knowledge, skills and attitudes that prepare people to fulfil their potential in personal, occupational and social life. This document also sets out key educational goals that contribute to achieving the objectives of [Estonia 2035](#) (Estonian Government, n.d.), the country's long-term development strategy.

Estonia's skills anticipation and governance system, centred on OSKA, has been recognised for its methodological robustness and strong stakeholder engagement (Cedefop, 2020; Praxis, 2018). [OSKA](#) provides an assessment of future skill needs in Estonia to help individuals make informed career decisions and contributes to the formulation of forward-looking employment and education policies (Kutsekoda, 2024). OSKA is part of [Kutsekoda](#), the Estonian Qualifications Authority. Kutsekoda was established by the social partners in 2001 to continue the development of the occupational qualifications system.

Like all skills anticipation and intelligence systems, OSKA and other elements of the system in Estonia need to continually adapt to address developments in the labour market, such as the impact of AI on skills demand. Strengthening the insights provided by skills intelligence can be achieved by leveraging new data sources and techniques, such as natural language processing (e.g. analysing online job advertisements). Governance structures also need to be reviewed periodically to ensure that the interests of key labour market actors continue to be represented (e.g. the government, employers from various sectors, workers and learners, and education and training providers). Adaptation is also needed to address persistent and emerging challenges. For example, Estonia faces labour and skills shortages that have the potential to constrain future productivity growth, especially in export industries. There are also concerns that labour and skills shortages will hinder the transition to a greener economy (Kaelep et. al., 2021; Cedefop & UNESCO-UNEVOC, 2025; IMF, 2025).

Estonia has responded proactively to these challenges. [Recent reforms](#) (ReferNet Estonia & Cedefop, 2025) of the education and training system have focused on improving the supply of economically valuable skills. [Vocational Education Institution Act](#) which came into force in September 2025 include raising the age of compulsory education to 18 years, increasing the flexibility and learner-centredness of vocational education and training (VET) curricula, enhancing the alignment of upper-secondary VET with higher education pathways, promoting more individualised learning paths and introducing tuition fees for certain target groups in vocational education (Riigikogu, 2026). These policy shifts aim to strengthen the skills formation system, but their effectiveness depends on the ability to identify what skills are needed, by whom and in which sectors and regions.

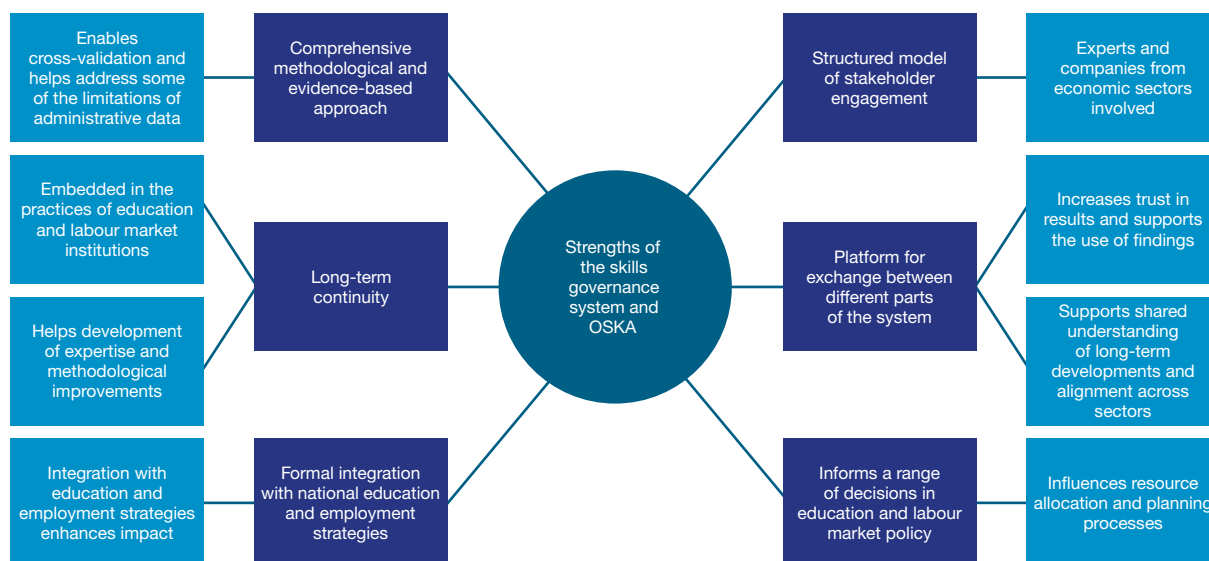
While OSKA has been successful in mapping the labour and skills challenges and opportunities in sectors, there is scope to further develop the system. Substantial European Social Fund Plus funding is being used by Estonia to further develop the OSKA methodology and replace the existing profession-based qualifications with skills profiles. It will also support the establishment of the comprehensive skills and professional qualifications system, called OsKuS, which is based on a new model of governance and interaction.

Assessing Estonia's current skills governance landscape

Information gathered through the research activities and direct engagement with stakeholders provides a rich picture of the current situation of skills governance in Estonia, with a particular focus on OSKA as the key provider of skills intelligence. A detailed strengths, weaknesses, opportunities and threats (SWOT) analysis made it possible to illustrate the current position of OSKA, and how potential weakness and threats could be addressed.

As stated in the introduction, OSKA's blended quantitative and qualitative approach makes it a trusted authority for identifying Estonia's current and future labour market trends. As a nationally embedded and methodologically robust tool, OSKA represents an EU best practice for structured, evidence-based skills governance. Its credibility is driven by strong legal integration and the active involvement of diverse stakeholders, including ministries, social partners and educational institutions, within its operational framework. The strengths of OSKA identified by stakeholders are shown in Figure 1.

Figure 1. **Strengths identified in OSKA and Estonia's skills governance system**



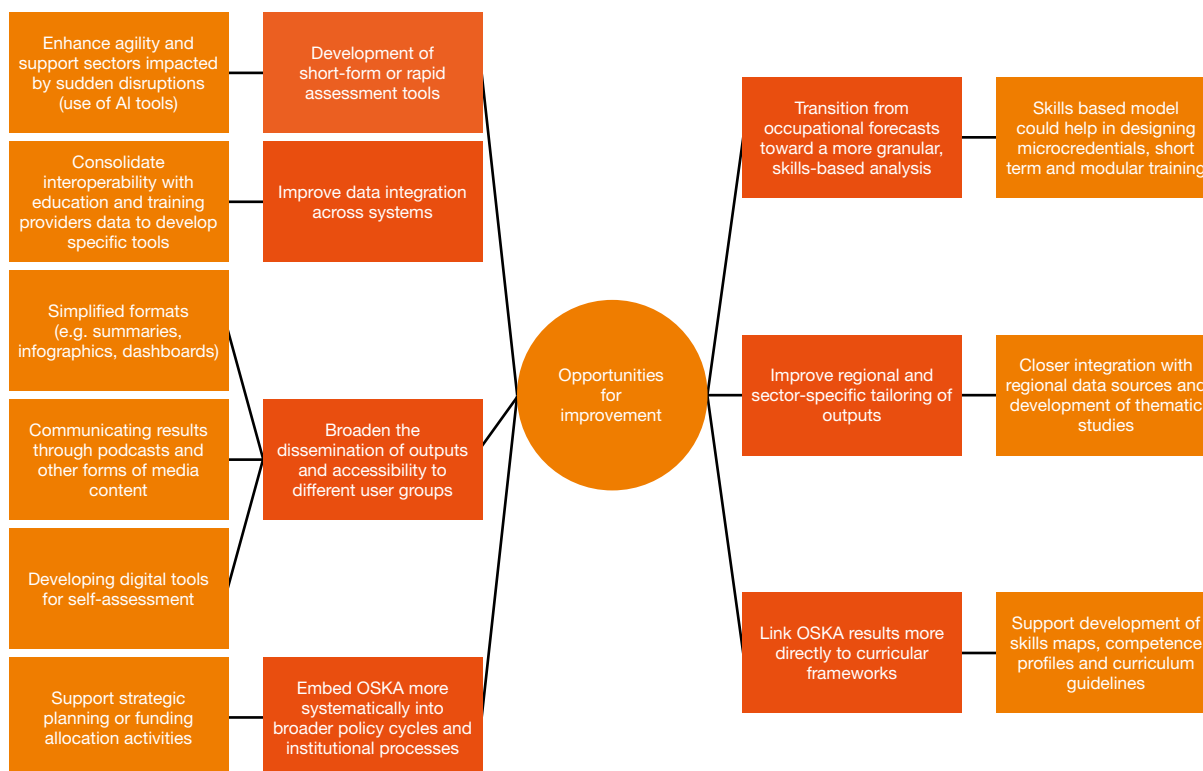
Source: Cedefop.

While the strengths depicted cover a range of factors, they may be summarised into three key strands:

- OSKA engages actively with stakeholders in consultative processes through sectoral panels, advisory groups and the Coordination Council.
- OSKA's comprehensive methodological approach combines data from national registries and statistics with qualitative inputs from stakeholders. In addition to allowing for cross-validation of outputs, this approach supports OSKA in serving as a platform that connects cross-sectoral needs and a shared understanding of long-term developments at the national level.
- As it is a trusted source that has provided evidence-based outputs for a considerable time, OSKA's findings are already leveraged in education and employment strategies.

The project activities have also sought out ways in which OSKA's research priorities and outputs could be more closely aligned with the current needs of different stakeholder groups. Although OSKA is a valuable skills anticipation tool, it faces structural, methodological and operational weaknesses in data limitations, usability and the translation of analysis into action. The project research highlights untapped opportunities to strengthen coordination across government and with sectoral, regional and local stakeholders. Addressing these implementation and representation gaps would significantly enhance the system's accuracy, inclusiveness and impact. Figure 2 summarises opportunities for improvement.

Figure 2. **Opportunities for improvement for OSKA and Estonia's skills governance system**



Source: Cedefop.

As with the analysis of the strengths of OSKA, certain key themes can be identified in the areas of opportunity:

- while the active involvement of current stakeholders is highlighted as a strength, it was also identified that there are other groups with which OSKA activities and outputs are less well connected, such as small and medium-sized enterprises (SMEs), young people and learners;
- access could be improved by adapting OSKA outputs to better fit the dynamic needs of all stakeholders (current and potential ones);
- OSKA's outputs could be strengthened through data integration and enriched with more datasets and types of data (e.g. online job advertisements).

The policy pointers in this report build on these strengths. They also target opportunities to increase the reach, impact and adoption of skills intelligence in Estonia.

To explore further how these improvements could be addressed, good practices and models from other countries were sought out. The platforms from Austria, Luxembourg and Singapore presented in

Table 1 illustrate effective ways to model and present skills data. These tools were selected based on their approaches' transferability, implementation feasibility and potential for impact in Estonia.

Table 1. **Tools and practices shared during the peer learning workshop**

Country, agency and tool	Summary of functions and outputs	Possible application to OSKA
Austria Arbeitsmarktservice (AMS) JobBarometer	The AMS JobBarometer analyses online job advertisements to provide historical data, regional insights and forecasts for various professions. It identifies in-demand skills and emerging trends, allowing users to compare occupations and understand evolving market requirements to make informed career and education choices. Information in the AMS JobBarometer is segmented by region. A key feature of the AMS JobBarometer is the ability to combine labour market intelligence from various sources into a three- to four-year horizon for forecasting, which provides a current, user-relevant picture of skills demand and occupational change.	The combination of labour market intelligence from online job advertisements, statistics and expert inputs within three- to four-year time horizons could bridge the gap between very short-term operational information and OSKA's longer-term strategic outlook. Additionally, the AMS JobBarometer provides an interesting example of how data based on online job advertisements and other inputs can be presented at the regional level.
Luxembourg Agence pour le développement de l'emploi (ADEM) JobInsights	ADEM serves as a central hub for skills governance in Luxembourg by conducting sectoral studies and 'foresight' workshops to anticipate future labour market needs. Through initiatives like Skills-Plang and the FutureSkills programme, ADEM translates these data into actionable upskilling and reskilling strategies, providing financial support and digital tools like JobInsights.lu to align the workforce with emerging professional requirements.	ADEM's work provides a model for the identification of cross-functional skills in support of career moves within and across sectors. ADEM's approach may also provide insights into how data extracted from online job advertisements can be used to show in-demand skills by occupation.
Singapore SkillsFuture Jobs-SkillsPortal TalentTrack	The Jobs-SkillsPortal provides datasets, insights, dashboards and algorithms to support informed decisions on jobs and skills development within the Singaporean economy. TalentTrack is a free-to-use skills dashboard for employers to obtain skills and training insights and course recommendations. Employers can benchmark training consumption against peers to identify industry-wide skills trends and prioritise training to address internal gaps. TalentTrack+ enhances this with profiling individual employee skills against industry standards, personalised career mapping, and a Careers & Skills Passport for precise worker-led data analysis.	SkillsFuture is an example of combining skills intelligence with training interventions. The Jobs-SkillsPortal is relevant to OSKA and the Estonian context, as it reveals a system with strong analytical capacity that is used to convert skills intelligence into services for a wide range of users, policy instruments and operational tools for stakeholders. The TalentTrack tools illustrate how these data can be used by both employers and employees to plan personalised learning needs and career mapping, within specific sector contexts.

Source: Cedefop.

While the tools and platforms showcased during the peer learning session are tailored to country-specific contexts and national objectives, they offer valuable parallels for Estonia. The discussion of the policy pointers in this report draws on these parallels to identify opportunities for enhancing national skills governance aligned with Estonia's current initiatives. Notably, Estonia launched the [Skills Compass](#) in 2024, an online tool providing insights into skills, occupations and labour market fields (Box 2).

Box 2. Skills Compass, Estonia

Designed for all individuals shaping their professional future, and for their supporters (including parents), the Skills Compass is expected to develop into a dynamic tool that supports the skills-related needs of various user groups, including individuals planning their learning and career paths, career counsellors, employers and recruiters, policymakers in the fields of education and employment, analysts and educational institutions. It will enable them to effectively link skills and occupations with learning and development opportunities, and with forecasts related to skills and occupations.

The Skills Compass is created and managed by Kutsekoda.



Source: Text adapted from [Kutsekoda – Skills Compass](#).

The need to explore the role of skills intelligence and skills anticipation methods in developing microcredentials ⁽¹⁾ and the identified opportunity to improve OSKA's approach to regional data and regionally tailored outputs were one of the key topics addressed during the study visit to An tSeirbhís Oideachais Leanúnaigh agus Scileanna (SOLAS), which oversees further education and training in Ireland.

Estonia and Ireland both use data-driven systems to predict future job needs and guide workforce development, though they focus on different levels of detail. SOLAS manages the National Skills Database and provides research, data and analysis for the Expert Group on Future Skills Needs and to inform its own work.

SOLAS showcased its approach to certifying micro-qualifications ⁽²⁾, particularly in high-demand areas like AI and digital technologies. These micro-qualifications are intended as nationally recognised, stackable credentials that enhance employability without the time commitment of traditional degrees.

By collaborating with SMEs to tailor course content, SOLAS ensures that education delivery remains responsive to specific regional and industry skills mismatches. Similarly, Estonia has integrated micro-credentials into its education ecosystem. As of 15 May 2026, there were [80 microcredential programmes](#) and 299 components of diploma programmes registered in the Estonian Education Information System.

The close collaboration of SOLAS with regional skills managers and partners in education and training boards could be inspirational for Estonia. The Regional Skills Fora are each led by a Regional Skills Fora Manager who engages directly with employers to identify current and emerging skills needs, labour market gaps and sectoral trends specific to that region. This approach is relevant to Estonia because it highlights that usability is not only about better products but also about intermediary mechanisms that help users interpret and apply the intelligence. The role of regional structures in translating skills intelligence into targeted training, microcredentials and apprenticeships in collaboration with employers is a strong aspect of SOLAS's architecture that could trigger change in the Estonian approach to the design of microcredentials.

⁽¹⁾ For the [definition of microcredentials](#), please see the Cedefop glossary (Cedefop, 2021). More information on microcredentials can be found at Cedefop, 2023a.

⁽²⁾ SOLAS uses the term 'micro-qualifications'. In this report, the term 'microcredentials' is used to define the record of learning outcomes assessed against a predefined standard.

Priority policy areas

The synthesis of the project elements implemented so far led to the identification of policy areas that can guide improvements in Estonia's skills anticipation system. These areas mainly reflect the core challenges and opportunities of OSKA, as identified earlier. The next sections describe in more detail the rationale of each thematic area. Specific steps to be taken that would achieve the desired outcomes in each area are proposed in the form of **policy pointers** in the final chapter. These will be the basis for a policy action plan that will include specific and realistic implementation actions.

1. Improving the uptake of OSKA findings in policy and practice

More frequent and timely communication between policymakers and the OSKA Coordination Council would greatly support the integration of research into various policy domains. Similarly, tailoring data specifically to practical decision-making can help maximise its utility across these areas.

2. Strengthening data quality and integration

While OSKA's mixed-method approach remains highly valued, growing demand for disaggregated, dynamic data suggest that incorporating a closer focus on specific skills – alongside broad occupations and sectors – would help align with evolving labour market needs.

3. Enhancing methods and timeliness

With modern education and job design increasingly focused on skills, incorporating labour mobility is a valuable next step for OSKA. Providing skills-level data via accessible, high-speed platforms can help meet user needs, enabling OSKA to stay responsive to rapid market shifts and provide stakeholders with timely, cross-sectoral insights.

4. Broadening stakeholder engagement

While Estonia has built a robust multilevel governance structure for OSKA, there is an opportunity to make engagement more consistent across all sectors. Incorporating a wider range of perspectives, particularly from SMEs, adult education providers and learners, would support a more comprehensive and holistic outlook.

5. Developing a regional dimension

While Estonia benefits from an integrated labour market, incorporating more disaggregated regional analysis could further clarify supply and demand dynamics in smaller, local markets. Introducing this regional perspective would offer valuable insights for addressing localised labour shortages and economic disparities.

6. Securing the sustainability of OSKA

The continued growth and success of OSKA will be closely tied to its development across these various areas. To maintain its strong role in policymaking and economic development, combining methodological innovation with stable, long-term financing will be key to supporting these strategic advancements. Accordingly, updating OSKA's evaluation framework would ensure it captures all subsequent enhancements and changes.

The policy areas outlined above are interlinked: progress in one area (e.g. improving uptake) often depends on advances in others (e.g. data integration, timeliness, stakeholder engagement). At the same time, there is no single 'one size fits all' sequence that applies in all contexts, as prioritisation will depend on policy objectives, available resources and implementation constraints. The purpose of presenting the areas in this way is therefore to clarify the main building blocks and their dependencies, so that policymakers can identify which measures act as near-term enablers and which are longer-term reforms in their specific context.

4.1. Improving the uptake of OSKA in policy and practice

OSKA is recognised as a provider of essential and wide-ranging labour market skills intelligence (see for example Cedefop, 2020; 2023b). There are, however, indications that information generated by OSKA is not fully integrated into policymaking; its outputs are typically used to provide contextual evidence rather than being a primary driver of decisions related to education planning, workforce development or skills policy prioritisation. While OSKA successfully produces sectoral analyses, forecasts and thematic studies, it is not always clear how these outputs feed into policymaking related to, for example, curriculum reform, the allocation of training places or targeted labour market interventions. Strengthening the role of OSKA outputs in policymaking may well require efforts to:

- (a) embed OSKA outputs formally into policy cycles (e.g. linking forecasts to planning documents, regulatory processes and programme approvals);
- (b) clarify institutional responsibilities for translating skills intelligence into action (i.e. the role of OSKA in supporting the activities of, for instance, ministries, sector bodies, and education and training agencies);
- (c) strengthen feedback loops between policymakers, education providers and OSKA analysts.

Ways in which OSKA's outputs could be more directly aligned with policy development include using scenarios to provide insights into a range of alternative skills policy choices; revealing the extent and implications of skills shortages for the economy; linking skills and sectoral competitiveness; and prioritising occupations or skills in need of targeted interventions. An important issue affecting the integration of OSKA's findings into policymaking is the mismatch between the time horizons of skills anticipation exercises and the needs of policy and education planning. Current OSKA analyses are oriented towards medium- to long-term developments (5 to 10 years ahead), which provide a time frame for looking at the likely impacts of, for example, demographic or technological change on the demand for, and supply of, skills, but not necessarily the operational needs of policymakers, employers or education providers. This raises the need for a more flexible approach to time horizons. For example, there is a need to address immediate labour market challenges, such as current skills shortages, migration flows or sector-specific disruptions (e.g. due to geopolitical developments). Stakeholders noted that OSKA is currently less effective in capturing such rapid changes, leading organisations to rely on real-time signals such as experiences of recruitment difficulties or salary surveys. The usability of results is also key, particularly in meeting the needs of different stakeholders.

Medium-term skills anticipation over a three- to five-year time horizon would be particularly relevant to education and training planning, especially for initial VET and for higher education. Curriculum development, accreditation processes and investment decisions require forward-looking information on emerging skills needs. Longer-term anticipation is the current strength of the OSKA system and, while this is needed, stakeholders also emphasised that forecasts need to be more frequently updated. In some instances, OSKA outputs were said to be 'behind the times' because forecasts had not been updated in a timely manner.

A more hybrid approach to skills anticipation, which combines traditional forecasting models with real-time data sources and qualitative intelligence, would provide the basis for developing a timelier approach to skills anticipation. The alignment of time horizons with policy and training cycles is critical, and a two-way process. For OSKA to produce timely data that can inform policymaking, it is essential for information on ongoing and potential policy developments to be shared with the OSKA Coordination Council when it is approving and prioritising research requests.

A further challenge is the limited and inconsistent use of OSKA findings in shaping education and training provision. While OSKA generates detailed insights into occupational trends and skill needs, these are not systematically translated into curriculum design, programme development or training delivery. Several factors explain this gap. First, formal education systems (especially initial VET and higher education) operate within relatively rigid regulatory frameworks, which limit their ability to respond quickly to changing labour market needs (this is not necessarily a negative thing in relation to initial VET and higher education). Second, communication between skills intelligence producers and education providers is often periodic rather than continuous. Third, OSKA outputs are not always sufficiently granular to inform curriculum-level decisions. To strengthen the impact of OSKA outputs in education planning, OSKA findings need to be articulated in a way that can inform qualification standards, curricula and assessment frameworks.

Evidence points to a growing recognition of the need to strengthen linkages between OSKA and the sectors it serves, as well as across these sectors. Education providers require information which is more context-specific to adapt provision to local labour market conditions. For example, both the human resources manager case study and the nursing case study in this project highlighted increasing collaboration between employers, education institutions and professional bodies in curriculum development and training design. Such collaboration helps ensure that training provision reflects real-world skills requirements, particularly in rapidly developing fields. These practices, however, are not always systematically rooted in OSKA's activities. This requires more emphasis to be placed on identifying the specific skills and competences required in various jobs and sectors ⁽³⁾. With better and more context-relevant information, OSKA can better fulfil its role as a platform for structured interaction between employers, education providers and policymakers, to facilitate consensus building on skills priorities.

The research conducted also highlights the need to better integrate formal, non-formal and informal learning within Estonia's skills governance framework. In this context, microcredentials have emerged as an important instrument for enhancing flexibility and responsiveness. Estonia has established a relatively advanced framework for microcredentials, including quality assurance mechanisms and the possibility of accumulating credits over time. These programmes, typically ranging from 5 to 30 ECTS (European Credit Transfer and Accumulation System credits, are designed to address specific skills needs and can be delivered by a range of providers, including higher education institutions, VET providers and accredited non-formal training organisations. Stakeholders reported that the effectiveness and attractiveness of microcredentials depend critically on their alignment with labour market needs (Pouliou, 2024). This is where OSKA can have a role. By providing evidence on emerging skills demands, OSKA can support the identification of priority areas for microcredential development (e.g. digital skills, AI, green skills), the design of targeted learning content, and the alignment of microcredentials with occupational standards and career pathways.

International experience, particularly from Ireland, demonstrates that microcredentials are most effective when they are co-designed with employers and embedded within a broader skills ecosystem. In Ireland, micro-qualifications are developed collaboratively with industry and delivered through flexible formats, enabling workers (especially those in employment) to upskill without significant disruption. In Estonia, responsibility for non-formal and informal learning is less clearly defined, and employer engagement in upskilling, particularly among SMEs, remains limited. OSKA has the potential to provide

⁽³⁾ The [Skills Compass](#) provides this kind of information but without a local labour market perspective.

the labour market skills intelligence to assist with specifying the content of microcredentials. However, there are other things that need to be in place for microcredentials to succeed, especially if they are to be co-developed with employers. These lie outside the remit of OSKA.

The uptake of OSKA findings is closely linked to stakeholder engagement and the usability of the system. SMEs, which form a large part of the Estonian economy, face specific challenges in engaging with skills development, including limited resources, time constraints and concerns about employee retention. In addition, there are questions about the depth and effectiveness of stakeholder participation. For example, it is not always clear whether representatives in expert groups fully reflect the views of their organisations or sectors, and whether OSKA findings are effectively disseminated within these networks.

Another important issue relates to the usability of OSKA outputs by different stakeholders. Current dissemination relies heavily on reports, which may not be easily accessible or actionable for all users. Enhancing usability also requires tailoring outputs to different user groups. Stakeholders emphasised the need for more user-friendly formats, including interactive dashboards; digital platforms integrating skills, training and labour market data; and tools supporting career guidance and workforce planning. In Estonia, pilot initiatives such as the development of the Skills Compass and AI-enhanced competence profiles offer promising entry points for such modernisation. International examples confirm the potential of such approaches. For example, Austria's Job Barometer and Singapore's [SkillsFuture](#) platform translate skills intelligence into practical tools for individuals, employers and policymakers.

Current limitations in regional data are a barrier to effective planning. OSKA's forecasts are made at the national level, with limited insight into regional labour market variation. For institutions operating in specific localities, granularity of data at the regional level is required for effective local decision-making. This is further discussed in Section 4.5 'Developing a regional dimension'.

4.2. Strengthening data quality and integration

OSKA's future effectiveness will depend increasingly on the quality, breadth and usability of the underlying data infrastructure. Estonia already has a strong starting point. OSKA's methodology combines administrative, statistical and qualitative data, and stakeholders regard this mixed-method model as one of the system's key strengths because it allows cross-validation of labour market change rather than reliance on a single data source. In particular, the use of tax and employment registries has improved the capacity to track occupations and employment trends more accurately than was possible when the system depended more heavily on survey and census sources.

The issue, however, is not simply whether OSKA has access to more data, but whether the existing data are sufficiently exploited, sufficiently linked and sufficiently usable for analytical and policy purposes. The next stage of OSKA's development requires improvement along three related dimensions:

- (a) extending the **range** of datasets used;
- (b) improving data **granularity** so that outputs are more relevant to sectoral, regional and programme-level decision-making; and
- (c) strengthening **interoperability** so that data can move more effectively across institutions, systems and policy uses.

OSKA already draws on a substantial body of administrative data, including tax records, the Estonian Education Information System and other registry-based sources. This is an important asset. Linking data from these national sources allows more precise tracking of graduates' occupational employment patterns over time. That said, evidence suggests that important datasets remain underused, partially integrated or disconnected from OSKA's core analytical processes. Several stakeholders identified the inability to link education records systematically to labour market outcomes as one of the biggest opportunities to improve the current system. In practical terms, this means that Estonia does not yet

fully exploit the potential of administrative data to trace how different educational trajectories relate to subsequent employment status, occupation, earnings, regional mobility or progression over time. There is a growing consensus on the need to deepen the integration of OSKA with complementary labour market tools, such as the Labour Demand Barometer, exploring in that way further collaboration with the Estonian Unemployment Insurance Fund, which runs the barometer, and with other actors.

Other datasets could enrich OSKA if more systematically integrated. These include online job advertisements, learner feedback data, alumni information and information generated in other parts of the skills and employment system, including the public employment service (PES). Increased integration can also address concerns about fragmentation across parallel initiatives within Estonia's skills ecosystem, and overlapping mandates between OSKA and other structures. Better information on international graduates, Estonians abroad, people with qualifications obtained in another country and individuals whose skills have been acquired outside formal education is also desired by OSKA stakeholders. Information on graduates by field of study and destination, including by job and region, is also seen as valuable.

Legal and technical barriers to having such linked datasets exist, however, especially barriers relating to data protection, access procedures and interinstitutional data sharing.

There are also methodological challenges. Administrative data are powerful, but they are not self-explanatory. Employment outcomes depend not only on the quality or relevance of education, but also on local labour market conditions, macroeconomic cycles, individual mobility, work preferences, migration and the structures of occupations. Administrative linkage can therefore enhance analysis significantly, but it cannot substitute for expert interpretation or qualitative insight. That is one reason why the existing strengths of OSKA's mixed-method approach should be retained even as the data infrastructure becomes more sophisticated.

Another challenge concerns granularity. Even when data exist, they are not always available or analysed at the level of detail required by users. Stakeholders from education institutions, public authorities and sector bodies said that OSKA outputs are often too aggregated for local planning, curriculum design or more targeted labour market interventions. This problem arises in several ways. OSKA's forecasts are largely national, whereas many education and labour market decisions are made in regional or local contexts. This can lead to institutions having to guess local skills needs because national averages do not reflect the labour market dynamics of smaller regions. There is potential value in regional dashboards showing jobs, salaries and education supply, even though long-term regional forecasts are difficult in a small country because outcomes may depend heavily on a small number of employers. This points to the need for a differentiated approach: not necessarily full regional forecasting everywhere, but better regional intelligence where feasible, especially through descriptive and near-real-time indicators ⁽⁴⁾.

There is also a sectoral and occupational granularity problem. OSKA's sector-based approach can obscure cross-sectoral skills mobility and does not always capture the skills similarities between occupations across sectors. And there is a programme-level granularity issue. OSKA often identifies professions or broad occupational needs but does not provide sufficient information on the specific competences that need to be embedded in curricula. Without more detailed information, providers themselves must interpret what labour market change means for programme content. Improving granularity therefore does not simply mean more detail for its own sake. For some users, national long-term sectoral forecasts remain appropriate. For others, especially providers, local authorities, the PES and learners, more disaggregated information is necessary.

The evidence collated for the project points to strong stakeholder interest in incorporating new data sources, particularly online job advertisements, curriculum vitae (CV) data and other digitally generated sources. These are seen as a way to improve timeliness, enhance skills-level analysis and complement registry data with more immediate signals of labour market change. Work is already under way in Estonia, including through efforts by the University of Tartu and the PES to analyse online job advertisements

⁽⁴⁾ Of interest here is the [labour force barometer](#) in Finland, which relies on forecasting and expert opinion to determine local (and sectoral) skill needs.

and CVs. Yet caution is needed in this work. Estonian-language natural language processing presents a significant technical challenge; vacancies vary widely with respect to how they are articulated and their level of completeness (Napierala, 2023).

A pragmatic way forward would be to proceed incrementally. Over the short to medium term, this could involve clearer governance arrangements for data sharing, pilot work on linked education–employment analysis, stronger use of existing PES and regional data, and improved integration between OSKA's other outputs and tools such as the Skills Compass. In parallel, methodological work could continue on skills extraction from online sources and on the use of new datasets to complement traditional forecasting.

4.3. Enhancing methods and timeliness

Emerging from the evidence gathered is a question of whether skills intelligence can be made more timely, more usable and more accessible to a broader range of users than at present. For some stakeholders, OSKA outputs can be too slow to be published, too technical and too difficult to translate into practical action for many intended users, especially SMEs, teachers, learners, career counsellors and those involved in short-term upskilling and reskilling. In this respect, the challenge is partly one of timing and partly one of audience. OSKA's current model is strong at producing medium- to long-term sectoral intelligence, but it is less well adapted to fast-moving developments or to users who need practical guidance rather than full analytical reports. Data can become outdated quickly in a rapidly changing labour market, the interval between major sectoral studies can be too long and the current outputs are not always sufficiently user-friendly for the general public or for smaller organisations.

Project findings emphasised that some sectors such as information and communications technology, healthcare and logistics develop too quickly for skills intelligence generated through multi-year sector studies to remain fully relevant. There is also a growing need for shorter-term and intermediate perspectives that can help users make decisions on training provision, funding or upskilling within a 1- to 4-year horizon, rather than only within a 10-year frame. In this regard, increased dialogue between OSKA and the sectors that are most affected by rapid change could assist in alerting OSKA to these changes so that it can better anticipate data and information needs. There is a high demand for complementing long-term forecasts with an intermediate horizon of around three to four years, more closely aligned with qualification and training cycles. The Austrian example is particularly relevant here: the [AMS JobBarometer](#) combines labour market intelligence from online job advertisements, statistics and expert inputs to produce a more current, user-facing picture of skills demand and occupational change ⁽⁵⁾. This kind of intermediate horizon could be useful for Estonia, especially in bridging the gap between very short-term operational information and OSKA's longer-term strategic outlook. This suggests that OSKA's long-term sectoral forecasts could continue to provide strategic orientation, while shorter-cycle products, such as flash updates, trend scans, rapid thematic briefs or dashboard-based indicators, could provide more immediate signals for users who need to respond to rapid change.

OSKA's current sector- and occupation-based approach, while valuable, is no longer sufficient on its own. Labour markets are becoming more fluid, occupations are changing internally and skills increasingly permeate multiple sectors. In that context, more granular, skills-based analysis is seen as a logical next step. Extending OSKA's methods so that they can describe changes in skills content, task composition and transferability more directly would be useful for curriculum reform, short-term training design, career transitions and the development of microcredentials. This may also support including more data on cross-sectoral mobility and hybrid roles, which are not always captured by sector-based forecasting.

Estonia is already moving in this direction. The [Skills Compass](#) – which is linked to OSKA – includes the development of a skills registry that currently comprises around 4 300 unique skills corresponding to

⁽⁵⁾ As noted earlier, Finland has a similar tool in place through its [labour force barometer](#).

around 470 occupations, with further expansion planned up to 2029. It also includes personalised profiles enabling jobseekers to map their skills and receive training recommendations. It also means that some of the user-facing developments stakeholders want are being developed through the Skills Compass. Inspiration for how the Skills Compass might further develop, using much of the data OSKA collects (or is likely to collect), might be gleaned from the [ADEM](#) system in Luxembourg. ADEM has developed a skills database extracted from job vacancies and uses public dashboards to show in-demand skills by occupation, allow users to compare their current skills with those required for target occupations and support counsellors in practice. This is seen as broadly compatible with the Estonian context, while acknowledging there are technical and governance challenges, especially around Estonian-language natural language processing, vacancy quality and interinstitutional coordination.

OSKA's outputs are valued among policymakers and experts, but many stakeholders considered them too lengthy, technical or difficult to navigate for non-specialist users. Several stakeholders suggested shorter summaries, infographics, dashboards, audio or video formats, one-pagers by occupation, and better integration with digital portals and career guidance services. Estonia may therefore wish to consider whether some of the translation function could be strengthened through closer engagement with employers, regional actors, PESs, career guidance and provider networks, rather than relying only on the publication of reports and digital outputs.

The evidence suggests that dissemination is an area where OSKA can improve. OSKA could focus more on dissemination strategies that increase reach and interpretation while allowing specialised tools, such as the Skills Compass, to carry more of the personalised service function. For example, outputs could be more clearly segmented by audience, with concise policy briefs for decision-makers, occupational snapshots for educators and learners, and sector-facing summaries for employers. Dissemination could rely more on digital formats that are easier to consume and share, as previously suggested. This is where the Austrian and Luxembourgish experiences are again useful. Austria's JobBarometer shows how labour market intelligence can be disseminated through a dashboard that allows navigation across occupations, skills, regions and trends, turning analytical output into a guidance tool. Luxembourg's JobInsights and related developments show how vacancy-based skills intelligence can be embedded in public-facing dashboards and comparison tools.

4.4. Broadening stakeholder engagement

Stakeholder engagement is one of OSKA's core strengths, but also one of the areas where further development could enhance the system's engagement with various labour market actors. Estonia has succeeded in building a structured governance architecture around OSKA, centred on the Coordination Council, the sectoral expert panels and the advisory function, which has contributed to the credibility of the system. Employers' organisations, ministries, social partners, education representatives and experts are already involved in the production and validation of skills intelligence.

At the same time, stakeholder engagement is currently concentrated in relatively formal functions, especially around the preparation of sector reports, validation of findings and methodological discussion. If the OSKA outputs are to be more widely used in shaping policy, education and training provision, career guidance and wider public understanding of labour market change, then stakeholder engagement may need to be considered more broadly. The question is not only who should help produce OSKA intelligence, but also who should help interpret it, communicate it, apply it and take ownership of it. The rationale for broadening stakeholder engagement is therefore twofold. First, it can improve the quality and relevance of the intelligence produced by incorporating perspectives that are currently under-represented in the governance structure. Second, it can strengthen uptake by involving those actors who are essential to translating OSKA findings into decisions, behaviour and action. In this sense, stakeholder

engagement should be viewed not only as an input into analysis, but as part of the wider governance of implementation, communication and use.

The present governance model provides OSKA with a strong institutional base. The Coordination Council brings together high-level representatives from the key ministries, the Unemployment Insurance Fund, the Bank of Estonia and social partners. Sectoral expert panels provide sector-specific intelligence and help validate the analysis, while the advisory function supports methodological development. This arrangement has enabled structured dialogue and has supported a relatively high degree of trust in OSKA's outputs. Stakeholders interviewed for the project referred positively to the consultation process and to the fact that different interests can contribute to the discussion.

There are several groups whose role in OSKA could be strengthened. SMEs are the group most frequently mentioned as being under-represented. Several stakeholders said that larger employers tend to dominate consultation processes, which may skew the analysis of labour demand and attendant training needs. SMEs can provide information on more diverse and localised skills needs, especially in sectors where work organisation is less formalised or where jobs require broader combinations of competences. Involving human resources associations or similar intermediaries may help here, as they can represent SME perspectives more effectively than formal consultation alone.

Current engagement appears to reflect formal education providers more strongly than the wider field of adult learning and non-formal provision. This matters because one of the findings from the project is that Estonia needs intelligence not only for long-term education planning but also for shorter-cycle upskilling and reskilling. There is a need to include adult education providers and to look beyond formal learning. The rationale for involving these providers is that they operate closest to the part of the training system that is expected to respond rapidly to labour market change. They can contribute insights into short-term skills needs, barriers to participation, the design of microcredentials and the practical translation of labour market intelligence into modular programmes. Their role would therefore be less about validating long-term forecasts and more about helping interpret what OSKA findings mean for flexible provision, adult participation and short-cycle interventions. They may also serve as important dissemination partners, especially if OSKA is increasingly linked to microcredentials and lifelong learning pathways.

Limited engagement with teachers, school-based career counsellors and professionals working with young people – even though these groups are often the ones who translate labour market information into practical guidance – may also be a concern. As some established organisations currently involved in OSKA may represent sectors or occupations at risk of decline, the system should engage more actors from emerging or future-oriented sectors. Representatives of green technologies, advanced digital services, defence-related fields or other growing activities may be better placed to identify new skills combinations, hybrid roles and business models that do not fit well within traditional sector boundaries.

4.5. Developing a regional dimension

The development of a regional dimension within Estonia's skills anticipation system emerges as both a clear policy demand and a complex methodological challenge. Across the evidence base, stakeholders consistently emphasised the importance of understanding skills demand and supply not only at the national level but also in relation to local labour markets. At the same time, they recognised that Estonia's demographic and economic structure, characterised by a high concentration of population and employment in Tallinn and Tartu, places inherent limits on the extent to which robust regional forecasting can be developed using conventional approaches.

Using the EU's standard NUTS 3 classification to collect data and harmonise data at the regional level is challenging to apply in Estonia ⁽⁹⁾. NUTS 3 regions are designed to have populations between 150 000 and 800 000. Because Estonia's overall population is small, its five NUTS 3 regions often hover right at – or fall below – this threshold. Small populations in these regions make statistical accuracy difficult to achieve. The concentration of employment in Tallinn and Tartu also means that national trends are often heavily influenced by developments in these areas. This can make it difficult to distinguish genuinely regional patterns from broader national ones.

The rationale for incorporating a regional perspective into OSKA is rooted in the functioning of labour markets. Individuals typically search for jobs within local labour markets, shaped by commuting patterns, housing availability, transport infrastructure and family considerations. Employers likewise recruit from local or regional pools of labour. Education providers, local authorities and employers often need information that reflects their immediate local labour market context. For example, VET providers must align provision with local employer demand; municipalities need to plan services and workforce development; and regional actors seek to attract and retain talent. Without some form of regional intelligence, these decisions rely heavily on partial information, informal networks or ad hoc judgement.

This tension between demand for regional intelligence and the constraints of data availability is central to the discussion. The key issue is therefore not whether a regional dimension should be developed, but how it can be designed in a way that is methodologically sound, proportionate and useful for decision-making.

A regional dimension, however, does not need to be uniform across the entire country. Instead, it can be developed selectively, focusing on areas where it is most feasible and most useful. Priorities may include making fuller use of administrative data to produce consistent regional indicators, integrating regional information from existing sources, such as PES data, employment registries and vacancy analysis. Greater coordination with regional development strategies could include strengthening mechanisms for regional stakeholder input and validation, and experimenting with pilot approaches in selected regions or sectors. Estonia might also look to the example of Ireland, which highlights the role of regional groups and experts in collecting data and helping in the interpretation and application of those data in the regional context. In Ireland, the Regional Skills Fora engage directly with employers, gather real-time intelligence and help translate this into targeted programmes, including microcredentials and sector-specific qualifications. A similar network of contributors in Estonia could help to bridge the gap in analysis and application of regional data.

Additionally, the AMS JobBarometer provides an interesting example of how data based on online job advertisements and other inputs can be presented at the regional level. Although Austria's larger population size and higher population density make the data richer, techniques for visualisation and mapping may still be useful inspiration for Estonia.

4.6. Ensuring OSKA's medium-term sustainability

The question of sustainability is central to the future development of OSKA. While the system has established itself as a credible and well-functioning component of Estonia's skills governance framework, its continued relevance and effectiveness will depend on whether it is supported by a stable and adequate resource base aligned with its evolving role. Parts of the system's development have been supported by EU funding instruments, including the European Social Fund and the Technical Support Instrument. This raises important questions about long-term sustainability and institutional embedding. A more stable national funding base could strengthen OSKA's role within the policy system, ensuring

⁽⁹⁾ NUTS 3 is the third level of the [nomenclature of territorial units for statistics](#), used by the EU to classify regions into small, local areas for specific socioeconomic diagnoses and analyses.

continuity and enabling further development of its functions (e.g. data integration, real-time analytics, user-oriented tools).

Evidence from the project indicates that external funding has benefited OSKA significantly. These funding streams have enabled methodological development, stakeholder engagement and system expansion. However, they also raise the question of whether OSKA can maintain and further develop its functions in the medium term without a more stable and predictable national funding basis. The current funding model, which includes significant reliance on project-based and EU funding, has certain advantages. It has allowed OSKA to innovate, to experiment with new methods and to benefit from international cooperation. However, reliance on external funding can make it more difficult to plan medium-term investments in areas such as data infrastructure, analytical tools or human resources. This is particularly relevant given the increasing importance of areas such as data integration, skills-based analysis and user-oriented dissemination. Securing the sustainability of OSKA is not only a financial issue but a governance one. It requires clarity about what functions OSKA is expected to perform, which institutions are responsible for these functions, how resources are allocated across different components of the system and how performance and impact are monitored. Thus, the medium-term sustainability of OSKA depends on aligning its funding model with its developing role. As the system moves from a relatively focused forecasting function towards a broader skills intelligence and governance role, its resource requirements will increase in both scale and complexity. A more stable national funding base, complemented by targeted external funding, could provide the foundation for this development.

Funding issues are also closely linked to the uptake and impact of OSKA. Stakeholders have high expectations of OSKA. Those expectations are dependent upon it being able to fulfil the needs of a wider group of users than today through the provision of new kinds of labour market skills intelligence disseminated through new kinds of platform. To achieve this requires funding to be in place. Without that funding, there is a risk that OSKA will fail to meet users' and potential users' expectations, with the result that the service will stagnate.

The uptake and impact of OSKA's work are central tenets of its long-term sustainability. This impact depends not only on the quality of its research but on how effectively those data are integrated into national development, sectoral development, and education and training policies. While decision-makers already utilise the system, there is a clear opportunity to embed OSKA more systematically into institutional processes. For example, integration could be deepened through legal frameworks that mandate the use of OSKA data in strategic planning or funding allocations. Establishing clearer institutional mandates and performance indicators would further ensure uniform application and strengthen accountability for addressing forecast skills needs.

Policy pointers to strengthen Estonia's skills anticipation system

The following policy pointers outline how OSKA can evolve over the short to medium term, expanding its skills intelligence to reach a broader range of labour market stakeholders. This is about the future development of OSKA and not a critique of the approach it has adopted to date. These policy pointers aim to strengthen the existing system, ensuring OSKA has the resources to scale up its intelligence and meet the growing demand for skills intelligence from a broader range of stakeholders. They have been distilled from the evidence collated over the course of the project to date.

5.1. Improving the uptake of OSKA's findings in policy and practice

The evidence collated in producing the current report draws attention to the need for OSKA to provide information to a wider range of stakeholders so that its findings can serve a broad range of policy needs. There is an inherent danger that expectations become unrealistically high. It might be the case that the policy requirements OSKA needs to satisfy are prioritised over other requirements. Putting this to one side, there is a view that OSKA has become somewhat separated from the policymaking process because its findings are out of step with the policymaking cycle. In other words, OSKA needs to provide findings at critical junctures in the policymaking process. Information could be prepared more frequently and disseminated through more dynamic channels. This can be addressed to some extent by making research findings more easily available through different channels, timelier in their publication and more readily interpretable by various potential users. Increasing dialogue between the OSKA Coordination Council and decision-makers in the stakeholder domains is also needed. It may well be the case that the above issues need to be resolved before thinking about the other reforms which might be introduced.

- **Key policy pointer 1.** (Re)identify or prioritise the key stakeholders/users OSKA is meant to serve. It may be the case that, in the short term at least, OSKA is best placed to serve some groups more than others. This prioritisation is important because it helps shape the data/indicators OSKA needs to prepare (or assists with their prioritisation).
- **Key policy pointer 2.** Undertake market testing to identify the data that policymakers – inside and outside government – require, how often those data need to be provided (periodicity) and how they can be best disseminated to those groups (e.g. through dashboards). There may be lessons to be learnt from websites such as that of SkillsFuture Singapore, which provides a one-stop shop of sorts for skills anticipation data for various users.

5.2. Strengthening data quality and integration

OSKA uses a wide range of data – both quantitative and qualitative – in undertaking skills anticipation. This is seen as a strength of the system, especially where various sources are used for purposes of cross-validation. Despite these strengths, the research highlights gaps in three key areas: optimising online job advertisement data, extracting structured insights from digital CVs and tracking educational pathways to better understand long-term labour market outcomes.

There is a growing demand for data focused on specific competencies rather than broad occupational categories. Specifically, individuals need to understand the exact requirements for pursuing or pivoting between career paths. There is also an interest in identifying those skills that extend throughout certain occupations or sectors. Beyond sector-specific data, there is a need to identify cross-functional skills. ADEM's work in Luxembourg provides a model for this, offering a practical framework to bridge the gap between an individual's existing competencies and those needed for their next career move. As discussed in Chapter 3, Estonia's Skills Compass, which includes an online skills registry, is a step in this direction.

As noted above, there is a need for all data to be disseminated so that they are easily accessible and interpretable by a wide range of users.

- **Key policy pointer 3.** Undertake a data audit (with reference to key policy pointers 1 and 2) to identify data gaps / datasets not incorporated within OSKA and identify the importance of the data that might be obtained from the analysis of these data; assess the added value these data sources will provide and the costs and benefits of developing the means to acquire the information.
- **Key policy pointer 4.** Ensure that data provided in reports and dashboards ⁽⁷⁾ are easily interpretable by their intended users.

5.3. Enhancing methods and timeliness

OSKA's 5- to 10-year outlook is ideal for capturing demographic and technological shifts, yet it lacks the agility to track rapid, short-term developments. While repeated follow-up surveys and ad hoc thematic studies have somewhat served to bridge this gap in the past, the entire system, as well as those who use it, would benefit significantly from more structural agility to navigate growing economic and labour market uncertainty. Current sectoral reporting cycles are often too infrequent, meaning findings can become outdated before they can effectively inform users in their decision-making and planning. There is a shift in demand from stakeholders for more frequent, up-to-date intelligence.

- **Key policy pointer 5.** Develop the means to produce shorter-term prognoses (indicatively one to three years' time horizon) of the changing demand for skills – and the resulting levels of skills mismatch – so that the messages from OSKA are timely. This is likely to include a mix of quantitative and qualitative methods to ensure that data and findings are relevant to the current needs of the labour market.

5.4. Broadening stakeholder engagement

The OSKA system already incorporates the views of various stakeholders. However, stakeholder engagement remains concentrated in relatively formal functions. A wider range of stakeholders could also be engaged. In particular, the views of SMEs, learners and adult learning providers are possibly under-represented. This last group was considered particularly important with respect to non-formal learning and the demand for microcredentials. It is a case of not simply increasing the stakeholder engagement – this could make decision-making cumbersome – but identifying where stakeholders can add value to the current system. This suggests that there is a need to map which stakeholders can best contribute to which function within OSKA. Some groups will be best placed to engage identifying specific skills needs; others may be better placed to assist with the dissemination and use of OSKA's findings.

For example, SMEs and human resources intermediaries could be used to provide information on localised, diverse skills needs in the production phase to balance the dominance of larger employers. In training and education, adult learning providers may have additional needs regarding data for short-cycle upskilling and the design of modular programmes. For career guidance stakeholders, such as teachers

⁽⁷⁾ Stakeholder input signals a strong preference for data to be included in dashboards.

and school-based career counsellors, enhancing access to and the interpretability of OSKA outputs could be a useful resource in providing practical guidance for learners and young people.

- **Key policy pointer 6.** Identify which groups are under-represented and how they might be incorporated in the OSKA system, and by what tools/methods. It is also important to identify which stakeholder groups are best suited to contribute to the various functional activities within OSKA.

5.5. Developing a regional dimension

Because people work and look for jobs in regional labour markets, there is a demand for information that reflects local hiring demand. Providing regional labour market information, for example at the NUTS 3 level, is not easy in Estonia due to the small size of the population. Reliable, representative data at the regional level are limited. Moreover, regions may also be subject to greater fluctuations in the local labour market, causing volatility in regional data and difficulties in providing interpretation and validation of regional employment demands. The research has illustrated examples from Ireland and Austria that demonstrate a plausible means of addressing regional labour market needs. This relies upon engaging local experts to adapt national analyses to reflect regional labour market conditions. OSKA could implement a similar model by establishing regional advisory groups as a pilot action.

- **Key policy pointer 7.** Learn from how similar countries have sought to provide and visualise regional labour market skills intelligence. Ireland and Austria provide examples, as do other countries such as Finland.

5.6. Ensuring OSKA's medium-term sustainability

To date, OSKA development has relied on EU funding. A stable source of longer-term funding is important for OSKA to build its portfolio of users and undertake the data collation, analyses and dissemination to meet the increasing demand for labour market skills intelligence. Without that long-term support, it is likely to prove impossible to develop the kind of OSKA that stakeholders would like to see serving employers, individuals/learners/jobseekers, policymakers, training and education providers, curriculum developers and other potential users of skills intelligence.

- **Key policy pointer 8.** Provide recurrent medium- to long-term funding of OSKA. Ultimately the sustainability of OSKA is not just down to funding. If OSKA is to satisfy the high demand for labour market skills intelligence, then the policy pointers provided above cannot be viewed in isolation. They are all interlinked. This leads to the final policy pointer.
- **Key policy pointer 9.** The sustainability of OSKA over the medium term is dependent upon it being able to satisfy an increasing demand for labour market skills intelligence. This is dependent upon it fulfilling the various interconnected information needs and dissemination plans outlined above, in cooperation with partners and other stakeholders.

Abbreviations

ADEM	Agence pour le développement de l'emploi (employment development agency)
AMS	Arbeitsmarktservice (labour market service)
CV	curriculum vitae
EU	European Union
NUTS	Nomenclature of Territorial Units for Statistics
OSKA	Oskuste Arendamise Koordinatsioonisüsteem (System of Labour Market Monitoring and Future Skills Forecasting)
PES	public employment service
SMEs	small and medium-sized enterprises
SWOT	strengths, weaknesses, opportunities and threats
VET	vocational education and training

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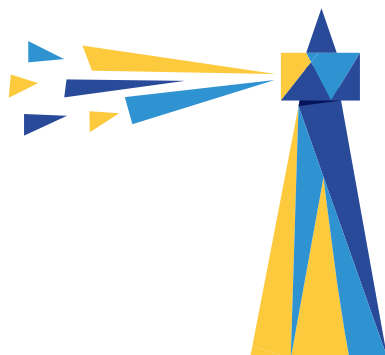
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Policy pointers to enhance Estonia's skills anticipation and governance system

This report presents policy pointers identified through the project 'Strengthening skills forecasting and skills governance system in Estonia'. The project is implemented by Cedefop, in cooperation with the Estonian Ministry of Education and Research and the European Commission.

Grounded in the evidence collected through desk research, stakeholder consultations, peer learning activities and comparative examples from other countries, a set of policy pointers is identified, aiming to provide strategic directions for the future development of OSKA and Estonia's wider skills governance system.

Intentionally indicative rather than prescriptive, the policy pointers are intended to support discussion among stakeholders and provide a basis for future implementation reform planning, prioritisation and sequencing. The analysis presented in this report may also be inspirational for other countries or regions that have skills governance reform aspirations.


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