



OECD Skills Studies

OECD Skills Strategy Kazakhstan

ASSESSMENT AND RECOMMENDATIONS

REPORT SUMMARY



OECD Skills Studies

OECD Skills Strategy Kazakhstan

ASSESSMENT AND RECOMMENDATIONS

This work is published under the responsibility of the Secretary-General of the OECD. The opinions expressed and arguments employed herein do not necessarily reflect the official views of OECD member countries.

This document, as well as any data and map included herein, are without prejudice to the status of or sovereignty over any territory, to the delimitation of international frontiers and boundaries and to the name of any territory, city or area.

The statistical data for Israel are supplied by and under the responsibility of the relevant Israeli authorities. The use of such data by the OECD is without prejudice to the status of the Golan Heights, East Jerusalem and Israeli settlements in the West Bank under the terms of international law.

Note by Turkey

The information in this document with reference to “Cyprus” relates to the southern part of the Island. There is no single authority representing both Turkish and Greek Cypriot people on the Island. Turkey recognises the Turkish Republic of Northern Cyprus (TRNC). Until a lasting and equitable solution is found within the context of the United Nations, Turkey shall preserve its position concerning the “Cyprus issue”.

Note by all the European Union Member States of the OECD and the European Union

The Republic of Cyprus is recognised by all members of the United Nations with the exception of Turkey. The information in this document relates to the area under the effective control of the Government of the Republic of Cyprus.

Please cite this publication as:

OECD (2021), *OECD Skills Strategy Kazakhstan : Assessment and Recommendations*, OECD Skills Studies, OECD Publishing, Paris, <https://doi.org/10.1787/39629b47-en>.

ISBN 978-92-64-53982-2 (print)

ISBN 978-92-64-53741-5 (pdf)

OECD Skills Studies

ISSN 2307-8723 (print)

ISSN 2307-8731 (online)

Photo credits: Cover © Studio Foltzer/Shutterstock.com; © evgeny kz/Shutterstock.com

Corrigenda to publications may be found on line at: www.oecd.org/about/publishing/corrigenda.htm.

© OECD 2021

The use of this work, whether digital or print, is governed by the Terms and Conditions to be found at <http://www.oecd.org/termsandconditions>.

Foreword

Developing relevant skills and using them effectively is crucial for Kazakhstan's ability to thrive in an increasingly interconnected and rapidly changing world.

In recent years, Kazakhstan has made significant progress in strengthening its skills system, and in its economic and social performance. However, the coronavirus (COVID-19) pandemic has been a uniquely disruptive shock, leading to hundreds of thousands of deaths globally and causing the most severe global economic recession since the 1920s. Kazakhstan acted quickly to contain the spread of COVID-19 and limit the adverse economic impact, by adopting rigid social distancing policies and implementing a robust anti-crisis package worth 9% of its gross domestic product (GDP). Nonetheless, COVID-19 has still brought human suffering to Kazakhstan and is having a substantial negative effect on current and future growth prospects.

Evidence-based skills policies can play a vital role in mitigating the adverse impacts of the COVID-19 crisis and supporting the ensuing recovery. The crisis has affected more vulnerable groups most intensely, with unemployment hitting low-skilled and informal workers the hardest. School closures have had a stronger impact on children from vulnerable families because they are generally less able to learn in an online environment. In the shorter term, supporting vulnerable groups, for example, by ensuring that low-skilled adults can promptly reactivate their skills in the labour market, can help reduce poverty and inequality. In the medium- to long-term, megatrends, such as globalisation, digitalisation and demographic change, will continue to transform jobs, the way society functions and how people interact. A resilient and adaptable skills system will allow Kazakhstan to benefit from these transformations, achieving higher levels of economic growth and well-being in the process, and will enable Kazakhstan to face the economic and social shocks of the future.

In recent years, Kazakhstan has implemented several strategies and reforms to create a skills system capable of addressing many of these challenges. The Kazakhstan 2050 strategy, which sets the long-run objective of transforming the country into one of the top 30 most developed economies in the world by 2050, identifies the creation of a modern and relevant system of lifelong learning among its seven priorities. To help bring forward this ambitious objective in the short term, Kazakhstan has launched the *Enbek* programme, which aims to promote productive employment and to engage citizens in entrepreneurship. It has implemented various measures, such as introducing the concept of non-formal education in legislation.

This report identifies four priority areas for strengthening Kazakhstan's endeavour to build a strong skills system: improving the activation of skills of vulnerable populations; fostering participation in adult learning of all forms; building an effective skills information system; and strengthening the governance of the skills system. These priorities will be at the core of further development of Kazakhstan's skills strategies. The OECD worked collaboratively with Kazakhstan to develop policy responses that are tailored to specific skills challenges and needs. The process involved detailed analysis and widespread engagement with over 150 stakeholders, leading to the recommendations set out in this report.

The OECD stands ready to support Kazakhstan further, particularly in light of the enormous challenges now emerging as a result of the COVID-19 pandemic, as it seeks to implement effective skills policies and continues its transition to a knowledge-based economy and society.

Executive summary

OECD-Kazakhstan collaboration on the OECD Skills Strategy project

The OECD Skills Strategy project provides Kazakhstan with an assessment of its skills performance and tailored recommendations. As part of the project, the OECD team organised three main consultations to generate a shared understanding of skills challenges and opportunities among governmental actors and non-governmental stakeholders. During these consultations, the OECD engaged with a range of departments and government agencies and over 150 stakeholders in interactive workshops, group discussions, and bilateral meetings in Nur-Sultan and Almaty, as well as a range of virtual sessions. This process provided invaluable input that shaped the findings and recommendations in this report.

Key findings and recommendations for improving Kazakhstan's skills performance

In recent years, Kazakhstan has made progress in strengthening its skills and economic performance. The inclusivity of Kazakhstan's skills system is strong across all levels of education, for example. Kazakhstan is improving rapidly in the use of skills at work, particularly in the application of digital skills. Its economic output has been steadily increasing, and other areas continue to see progress, such as health and accessibility to services.

However, the skills of youth in Kazakhstan remain substantially below the average across OECD countries. Adults also possess comparatively weak foundational and problem-solving skills, as the culture of adult learning is under-developed. Vulnerable populations face high barriers to the activation of their skills in the labour market, and inadequate skills information systems prevent more effective and targeted policies. Many of these skills challenges are rooted in poor governance arrangements, including weak intragovernmental co-ordination and co-operation and insufficient stakeholder engagement.

The coronavirus (COVID-19) pandemic poses a unique challenge to Kazakhstan's economy and society. Kazakhstan acted quickly to contain the spread of COVID-19 and limit its adverse economic impact, but the virus has brought human suffering and is having a substantial negative effect on Kazakhstan's current and future growth prospects. Evidence-based skills policies can play a vital role in mitigating the adverse impacts of the COVID-19 crisis and supporting the ensuing recovery.

Kazakhstan has already implemented a range of strategies and reforms to address the above-mentioned challenges. The OECD and the Government of Kazakhstan have identified four priority areas to further improve Kazakhstan's skills performance, which are the focus of this report. The key findings and main recommendations are summarised below.

Improving the activation of skills of vulnerable populations

Skills activation policies play a crucial role in supporting the employment of vulnerable populations and ensuring inclusive growth. In Kazakhstan, activating the skills of those most exposed to the risk of falling into long-term unemployment, particularly youth, older workers and people with disabilities, is a key priority. During economic downturns, such as the one caused by the COVID-19 pandemic, policies to support activation are particularly important to ensure that individuals working in non-standard jobs, who face a higher risk of economic dislocation, are not left behind.

The main recommendations are:

- Adopt and utilise digital communication tools to ensure the continuation of services during and following the COVID-19 crisis.
- Improve jobseeker profiling tools to enable upfront intervention by allowing caseworkers to set up individual action plans.
- Scale up expenditure on activation programmes with a proven track record and capacity to secure the achievement of stated objectives.

Fostering participation in adult learning of all forms

Across all countries, participation in adult learning has significant benefits for individuals, employers and society as a whole, including higher wages, higher productivity and higher levels of social trust. Throughout the project, the OECD provided support for identifying how to adapt the supply of adult learning to help companies and individuals cope better with the social distancing measures made necessary by the COVID-19 pandemic. In the longer term, fostering participation in adult learning of all forms can help Kazakhstan move away from a low-skill equilibrium towards high-productivity and high-skill activities.

The main recommendations are:

- Introduce a strong certification and monitoring system to certify the quality of non-formal adult learning opportunities.
- Develop a shared vision on the importance of adult learning, based on extensive consultations with stakeholders.
- Review training plans in state-owned enterprises to ensure that they enable all employees to develop a broad set of technical, foundational and soft skills.

Building an effective skills information system

An effective skills information system plays a key role in reducing skills shortages and mismatches, by providing information on current and future skills needs and career and learning opportunities. This can be used to inform a broad range of policies, from employment, to education and training, along with policies targeted at the most vulnerable. Timely skills information is particularly important during economic downturns, such as the one caused by the COVID-19 pandemic, which is characterised by rapidly changing labour markets.

The main recommendations are:

- Adopt an integrated approach by combining qualitative and quantitative methods to achieve robust skills analysis results.
- Improve the frequency and coverage of quality data on skills and labour markets, by strengthening statistical surveys and expanding administrative data collection.
- Introduce a consolidated portal to provide all individuals with access to information on skills needs, labour market trends and the availability of study/work opportunities.

Strengthening the governance of the skills system

Effective governance arrangements are central to supporting skills policies and developing policy responses to the COVID-19 pandemic, as well as other cross-cutting policy challenges. Better co-operation and collaboration arrangements are crucial to ensure that Kazakhstan develops and implements policies that are coherent and mutually reinforcing. Stronger mechanisms to engage stakeholders can enable policy makers to gain information regarding the real-world effects of policies and regulations. Aligned and co-ordinated financing arrangements can also help ensure that Kazakhstan provides adequate resources for skills policies, which are then distributed efficiently and equitably.

The main recommendations are:

- Strengthen the remit of the National Council for Development of Social and Labour Sector by specifying a clearly defined mandate and introducing a combination of inter-ministerial working groups and technical bodies.
- Introduce a technical body to co-ordinate the development of the National Qualifications System.
- Introduce a training levy to increase the financial contribution of employers to vocational education and training, adult learning and active labour market programmes, following extensive consultations with employers.

1 Key insights and recommendations for Kazakhstan

This section summarises the context, key insights and policy recommendations of the OECD Skills Strategy Assessment and Recommendations project in Kazakhstan. It applies the OECD Skills Strategy Framework to assess the performance of Kazakhstan's skills system. On the basis of this assessment, four priority areas for action were identified by the OECD in collaboration with the Kazakhstan National Project Team. For each priority area, the section provides an overview of the performance, the policy context and a summary of the key findings and recommendations.

Skills matter for Kazakhstan

Skills are vital for enabling individuals and countries to thrive in an increasingly complex, interconnected and rapidly changing world. Countries in which people develop strong skills, learn throughout their lives, and use their skills fully and effectively at work and in society are more productive and innovative, and enjoy higher levels of trust, better health outcomes and a higher quality of life. As new technologies and megatrends, such as globalisation, digitalisation and demographic change, increasingly shape our societies and economies, getting skills policies right becomes even more critical for ensuring societal well-being and promoting growth that is inclusive and sustainable.

Since its independence, Kazakhstan has achieved significant economic and social progress. Driven by a boom in natural resource extraction that started in the early 2000s, Kazakhstan has succeeded in raising living standards, decreasing poverty and increasing employment levels. Since 2002, gross domestic product (GDP) per capita has risen six-fold and is now at levels similar to that of some OECD countries, such as Chile, Greece and Turkey, at purchasing power parity (PPP) (OECD, 2019^[1]). The percentage of the population living below the national poverty line has fallen from 46.7% in 2001 to just 2.5% in 2017, and life expectancy at birth has risen from 65 years in 2000 to 73 in 2018 (World Bank, 2020^[2]).

Evidence-based skills policies are crucial to ensure that Kazakhstan can continue on this trajectory. In the shorter term, developing appropriate policy responses to the coronavirus (COVID-19) crisis, by supporting vulnerable groups and fostering the ensuing recovery, remains the overarching policy priority. In the medium to long term, better skills policies remain fundamental to helping Kazakhstan achieve a higher level of prosperity. Megatrends will continue to transform jobs, the way society functions and how people interact. Better skills policies will allow Kazakhstan to benefit from these transformations, achieving higher levels of economic growth and well-being in the process.

The COVID-19 pandemic is an unprecedented economic shock for Kazakhstan

The COVID-19 pandemic is a global health crisis without precedent in living memory. It has strained healthcare systems and resulted in hundreds of thousands of deaths globally. It has also caused the most severe economic recession since the 1920s. Vaccination campaigns, concerted health policies and government financial support are expected to lift global GDP by 4.2% in 2021 after a fall of 4.2% in 2020. While this outcome is better than predicted in mid-2020, the pandemic's effects will be long-lasting (OECD, 2020^[3]).

Kazakhstan acted quickly to contain the spread of the coronavirus in 2020, creating a state commission to co-ordinate the effort to fight the pandemic, and declaring a state of emergency between March and May 2020. The state of emergency saw quarantine procedures implemented in all regions, with selected quarantine and social distancing policies remaining in force beyond mid-May 2020. Kazakhstan also implemented an extensive series of measures to mitigate the economic impact, designing an anti-crisis package of USD 10 billion (KZT 4.4 trillion or about 9% of GDP) (OECD, 2020^[4]). According to official statistics, support programmes so far have provided employment to over 750 000 people, and direct income support to about 4.6 million people (OECD, 2020^[4]). In September 2020, additional measures to foster economic development, reduce regional imbalances, strengthen the healthcare system, improve digitalisation and increase accessibility and quality of education were announced (President of the Republic of Kazakhstan, 2020^[5]).

Nonetheless, COVID-19 has still brought human suffering to Kazakhstan and is having a significant negative effect on current and future growth prospects. The economy contracted by 3% in January-August of 2020, down from an annual GDP growth rate of 4.5% in 2019 (World Bank, 2020^[6]; Asian Development Bank, 2020^[7]), and is expected to only moderately recover in 2021 (World Bank, 2020^[8]). Over the January-August 2020 period, retail trade fell by 11.7%, investment dropped by 5.2%, and exports fell amid weak global demand. In line with other countries around the world, lockdowns led to the closures of

education and training institutions, with most learning opportunities moving on line. In Kazakhstan, the four months of school closures between March and June 2020, and the disruption to education caused more generally throughout 2020 and early 2021 could have a decades-long impact on the economy and society. The World Bank estimates that student cohorts affected by COVID-19 in Kazakhstan could have their future earnings reduced by an estimated 2.9%, amounting to an overall yearly economic loss of up to USD 1.9 billion (2011 PPP) (World Bank, 2020^[9]).

These dynamics have affected more vulnerable groups most intensely, both in Kazakhstan and worldwide. Children, young people and adults with lower access to information and communication technology (ICT), for example in rural areas, and weaker ICT skills, often face a more difficult socio-economic situation and are less likely to be able to learn in an online environment. For instance, it is estimated that the pandemic has led to a widening of the reading achievement gap by 18% between children from poor and rich households, although the full-scale impact is not yet known (Marteau, 2020^[10]). The crisis has made it more difficult for young people to complete their school-to-work transition, generating long-term losses in earnings and well-being through “scarring effects” (OECD, 2020^[11]). The crisis also had a stronger effect on sectors, such as personal services, which have a higher proportion of lower-skilled workers and women (Workforce Development Center, 2020^[12]; OECD, 2020^[11]).

Investing in skills remains essential as the world slowly adjusts to a new normal. In the shorter term, measures to strengthen skills activation, for instance through carefully designed active labour market programmes (ALMPs) and targeted investments in public employment services (PES), will be crucial to ensure that vulnerable groups are not left behind (see Chapter 2 in the full report). Including vulnerable groups in the policy responses to the COVID-19 crisis is key to reducing inequality and poverty. As a new normal emerges, Kazakhstan’s prosperity will then depend on its capacity to respond to the transformations induced by megatrends.

Integration in global value chains can help diversify Kazakhstan’s economy in the long term

The first of the megatrends is globalisation. Most countries are now integrated to some degree in global value chains (GVCs), with products designed, manufactured and assembled across different locations (OECD, 2019^[13]). Over the last three decades, Kazakhstan has developed an open economy with the export of goods and services contributing to 37.5% of GDP (World Bank, 2018^[14]), compared to an OECD average of 30% (OECD, 2018^[15]). However, exports are heavily dependent on natural resources. In 2018, crude petroleum oils made up 43.5% of gross exports, and Kazakhstan’s exports of all minerals and metals combined formed 73.4% of gross exports (Atlas of Economic Complexity, 2020^[16]). This reliance on fossil fuels and natural resources might become problematic in light of climate change action. The worldwide transition to renewable energies and carbon-friendly production processes will lead to decreased revenue and employment losses in coal mining, oil and gas mining, oil refining and natural gas utilities, which are crucial sectors for Kazakhstan’s economy (ILO, 2017^[17]; Martinez-Fernandez, Hinojosa and Miranda, 2010^[18]).

Further integration in GVCs can help Kazakhstan build a more diversified and dynamic economy. Kazakhstan is ideally placed to become integrated into GVCs as it occupies a key geographical position at the crossroads of Western Europe, South Asia, the Russian Federation (hereafter “Russia”) and the People’s Republic of China (hereafter “China”). While trade with Central Asian partners accounted for just 5% of total exports in 2015, Central Asian markets are vital for Kazakhstan’s non-extractive industries. Kazakhstan is already actively pursuing trade integration through the Eurasian Economic Commission (EEC), the Central Asia Regional Economic Cooperation (CAREC) Programme, and other regional bodies, as well as recently joining the World Trade Organization (WTO) in 2015 (World Bank, 2018^[19]).

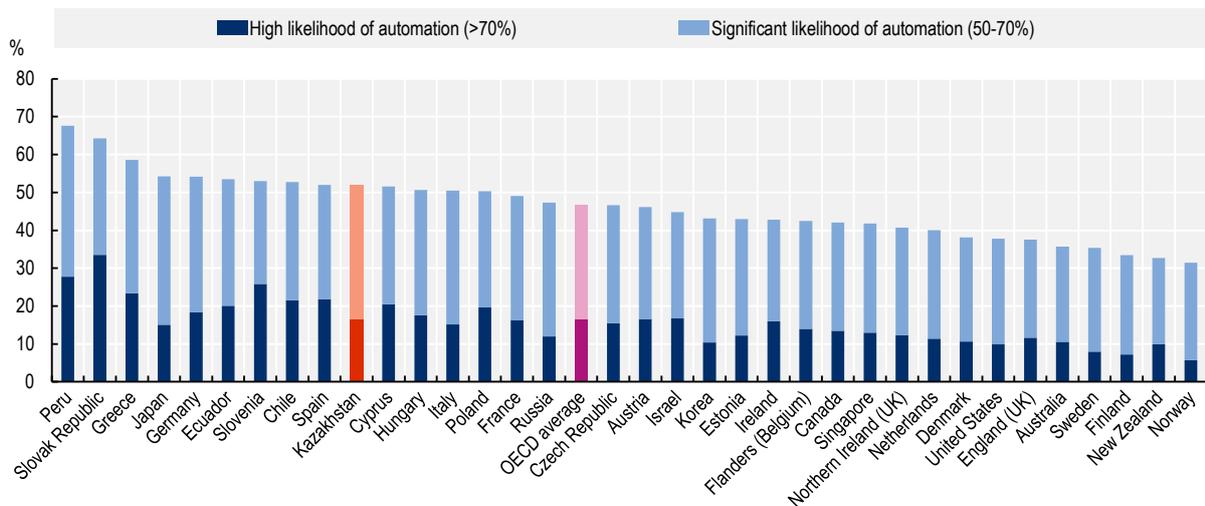
Strengthening the skills system, by expanding access to adult learning opportunities and improving governance of skills policies, will help Kazakhstan better integrate into these GVCs. For example, a strengthened skills system will help ensure that Kazakhstan is able to take advantage of foreign direct investment channelled through The Belt and Road overland route that China has planned (World Bank, 2018_[19]).

Digitalisation can increase productivity and create high-skilled jobs but may lead to some employment losses in lower-skilled occupations

The second megatrend that will contribute to transforming the economy and society is digitalisation. Rapid advances in technology are transforming how people live and work. Innovations in artificial intelligence, big data and other ICTs present an opportunity to improve productivity and create high-skilled jobs (OECD, 2019_[20]). However, these technological innovations could also lead to employment losses in occupations that have a high proportion of routine tasks, such as controlling or operating machines, which are often performed by lower-skilled individuals. Jobs in Kazakhstan have a comparatively high risk of automation. According to OECD estimates, 52% of jobs are at high or significant risk of being automated, compared to an OECD average of 47% (see Figure 1.1). Jobs most resilient to automation are characterised by the frequent use of complex problem solving on the job and involvement in complex social interactions, such as teaching, influencing or advising others.

Figure 1.1. Likelihood of job automation in Kazakhstan and selected countries

Percentage of jobs that have a high or significant likelihood of automation



Note: Selected countries refer to countries that participated in the Survey of Adult Skills, a product of the Programme for the International Assessment of Adult Competencies Survey of Adult Skills (PIAAC). Jobs are at high risk of automation if their likelihood to be automated is at least 70%. Jobs at risk of significant change are those with the likelihood of being automated at between 50% and 70%.

For PIAAC data from Russia: The sample for the Russian Federation does not include the population of the Moscow municipal area. The data published, therefore, do not represent the entire resident population aged 16-65 in the Russian Federation but rather the population of the Russian Federation excluding the population residing in the Moscow municipal area.

Source: OECD (2019_[21]), *Skills Matter: Additional Results from the Survey of Adult Skills*, <https://dx.doi.org/10.1787/1f029d8f-en>. Estimates based on Nedelkoska, L. and G. Quintini (2018_[22]), "Automation, skills use and training", https://pmb.cereq.fr/doc_num.php?explnum_id=4268.

StatLink  <https://doi.org/10.1787/888934233397>

Workers in Kazakhstan are less engaged in frequent use of complex problem solving and complex social interactions than their peers in OECD countries and other economies. For instance, 12.6% of workers in Kazakhstan report never solving simple or complex problems at work, a result lower than only Ecuador

and Mexico, but well above the OECD average of 6.9% (OECD, 2019^[21]). Similarly, workers in Kazakhstan report the second-to-lowest level of engagement in social interactions at work across countries that participated in the Survey of Adult Skills (PIAAC).

To reduce employment losses and realise the productivity benefits of automation, Kazakhstan will need to encourage the development of higher value-added sectors and provide lower-skilled workers with upskilling and reskilling opportunities, for instance, to help them develop digital and soft skills. Going forward, the COVID-19 pandemic will likely further reinforce the urgency of this challenge, by accelerating the pace of digitalisation, as individuals increasingly find themselves making their purchases on line and working remotely.

Kazakhstan benefits from a demographic dividend but will be exposed to population ageing in the long run

Lastly, demographic change will transform the economy and society. In the upcoming decades, OECD countries will be generally exposed to population ageing, which might increase skills pressure and cause changes in the patterns of consumption, with demand shifting from durable goods towards services, such as healthcare and leisure (OECD, 2019^[13]).

Kazakhstan is less exposed to population ageing than most OECD countries and neighbouring countries, such as Russia, and continues to benefit from a demographic dividend. The dependency ratio (i.e. the number of pensioners per working population) should peak around 2020 and then remain relatively stable in the upcoming decade, as the result of a “baby boom” in the last decade (OECD, 2016^[23]). After a serious decline in the 1990s, fertility rates in Kazakhstan rose from 1.7 in 1999 to 2.8 in 2018 (World Bank, 2020^[24]). This increase in fertility rates means that over one-quarter of the population is currently under 15 years old, compared with the OECD average of less than one-fifth. Consequently, Kazakhstan’s school-age population is predicted to grow 20% between 2015 and 2030 and labour force growth will also accelerate, peaking around 2030, as the baby boom generation enters the labour market.

To take full advantage of these trends, Kazakhstan will need to expand schooling opportunities while also increasing the quality and relevance of skills that its youth will develop. It will also need to ensure that high-skilled, productive jobs are available to those entering the workforce.

Nonetheless, Kazakhstan will eventually need to address population ageing in the longer term up to 2050 and ensure that a system for lifelong learning is in place to enable adults to upskill and reskill. This is especially important considering the changes automation and climate change will bring to Kazakhstan’s job market.

Skills should be at the core of the policy response

The COVID-19 crisis and these megatrends reinforce the need for Kazakhstan to have a forward-looking, dynamic skills strategy. Strengthening the activation of skills, especially of vulnerable individuals, such as youth and low-skilled individuals, through carefully designed ALMPs and targeted investments in PES, will enable individuals to re-join the labour market as the economy recovers from the pandemic. In the long term, people will need a stronger and more comprehensive set of skills. Strong foundational skills will make people more adaptable and resilient to changing skills demands, with digital, transversal, social and emotional, and job-specific skills (see Box 1.1) becoming increasingly essential for adults to succeed in both work and life.

Box 1.1. The OECD Skills Strategy definition of skills

The *OECD Skills Strategy 2019* identifies a broad range of skills that matter for economic and social outcomes, including:

- **foundational skills**, including literacy, numeracy and digital literacy
- **transversal cognitive and meta-cognitive skills**, including critical thinking, complex problem solving, creative thinking, learning to learn and self-regulation
- **social and emotional skills**, including conscientiousness, responsibility, empathy, self-efficacy and collaboration
- **professional, technical and specialised skills**, as needed to fulfil specific occupational tasks.

Source: OECD (2019^[13]), *OECD Skills Strategy 2019: Skills to Shape a Better Future*, <https://dx.doi.org/10.1787/9789264313835-en>.

The OECD Skills Strategy project in Kazakhstan

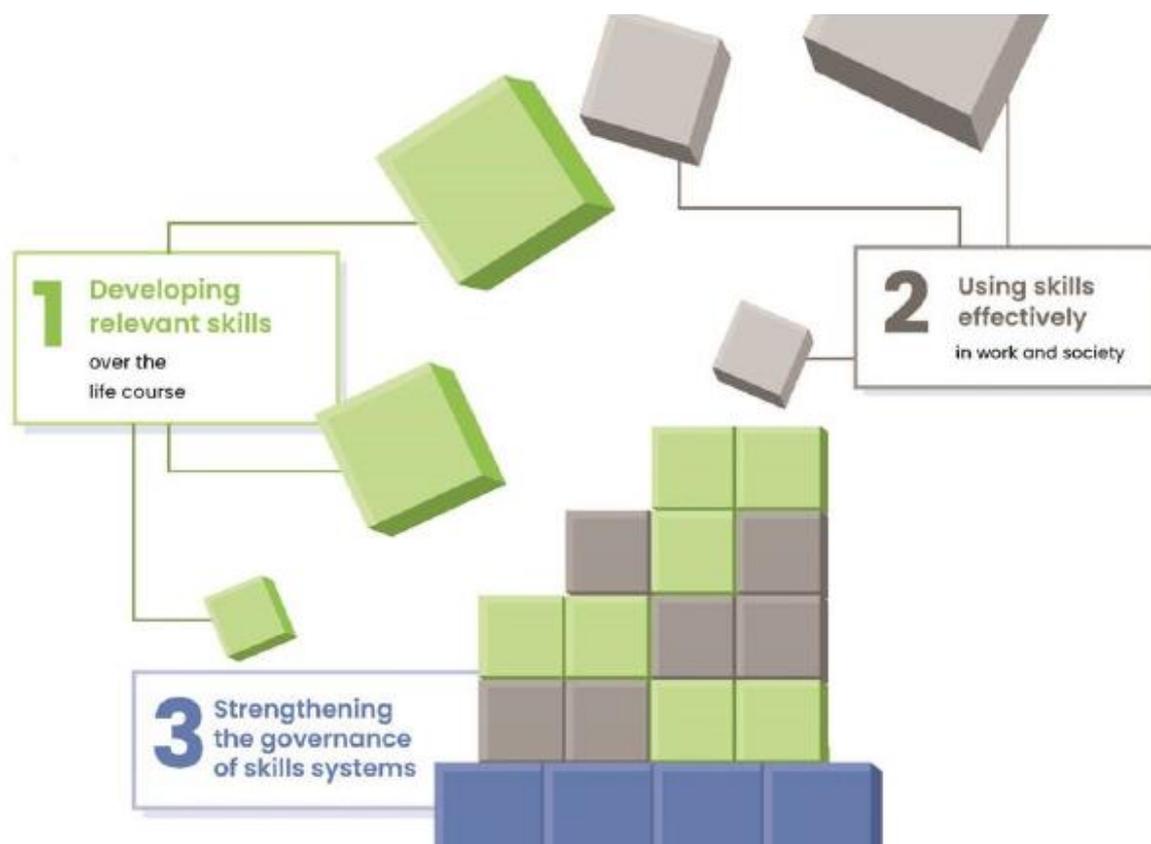
OECD Skills Strategy projects provide a strategic and comprehensive approach to assess countries' skills challenges and opportunities and build more effective skills systems. The OECD collaborates with countries to develop policy responses tailored to each country's specific skills challenges and needs. The foundation of this approach is the OECD Skills Strategy Framework (see Figure 1.2), the components of which are:

- **Developing relevant skills over the life course:** To ensure that countries are able to adapt and thrive in a rapidly changing world, all people need access to opportunities to develop and maintain strong proficiency in a broad set of skills. This process is lifelong, starting in childhood and youth and continuing throughout adulthood. It is also "life-wide", occurring both formally in schools and higher education, and non-formally and informally in the home, community and workplaces.
- **Using skills effectively in work and society:** Developing a strong and broad set of skills is just the first step. To ensure that countries and people gain the full economic and social value from investments in developing skills, people also need opportunities, encouragement and incentives to use their skills fully and effectively at work and in society.
- **Strengthening the governance of skills systems:** Success in developing and using relevant skills requires strong governance arrangements to promote co-ordination, co-operation and collaboration across the whole of government; engage stakeholders throughout the policy cycle; build integrated information systems; and align and co-ordinate financing arrangements.

The OECD Skills Strategy project for Kazakhstan adopted this approach using an inter-departmental project team to support the whole-of-government approach to skills policies, and by engaging a broad variety of stakeholders.

The project officially started with a Skills Strategy Policy Seminar in October 2019. As part of the project, the OECD team organised two main consultations to develop a constructive dialogue between government actors and stakeholders in order to generate a shared understanding of skills challenges and opportunities as a basis for action.

Figure 1.2. The OECD Skills Strategy Framework



Source: OECD (2019^[13]), *OECD Skills Strategy 2019: Skills to Shape a Better Future*, <https://dx.doi.org/10.1787/9789264313835-en>.

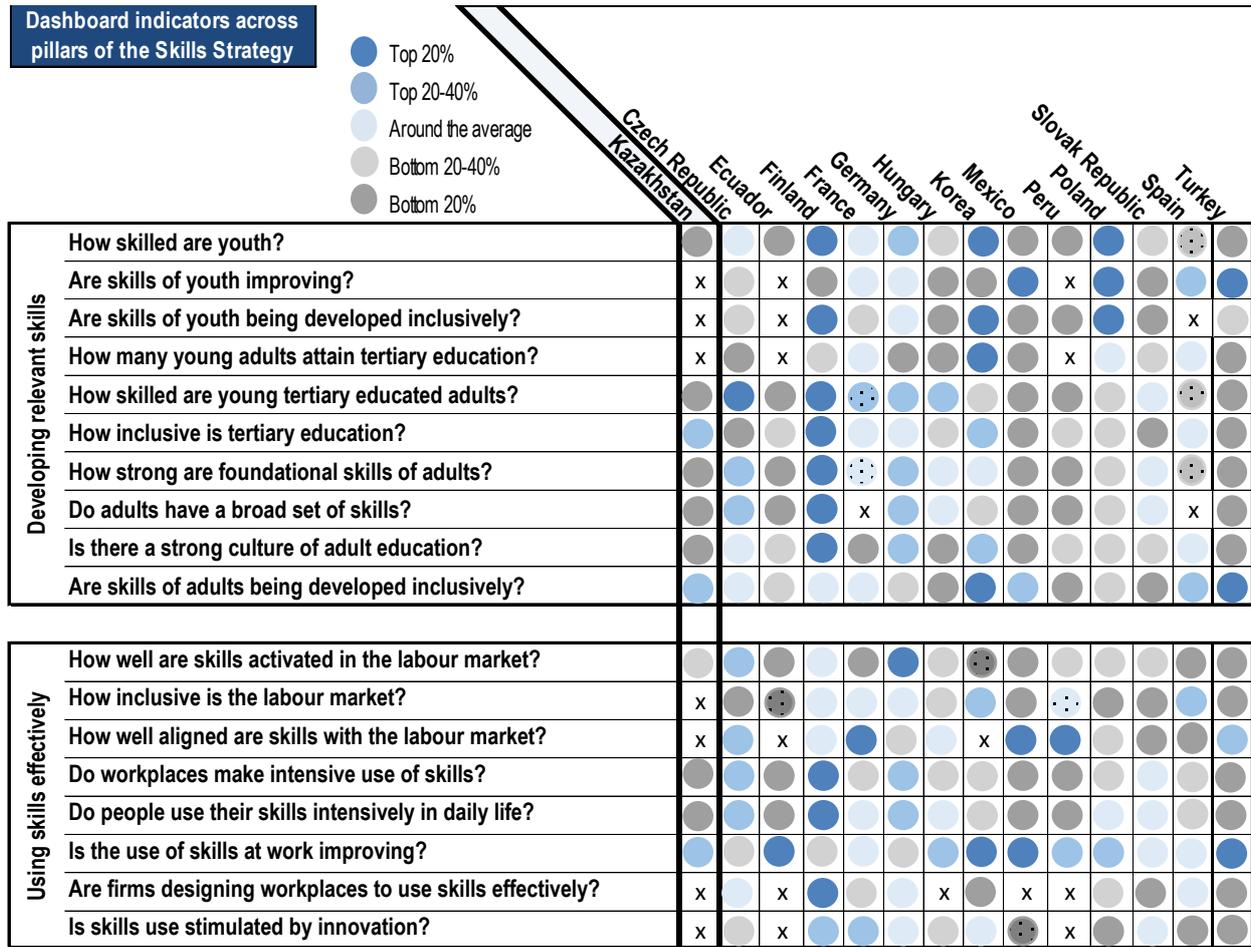
The OECD team travelled to Kazakhstan for an Assessment Mission (February 2020) to discuss Kazakhstan's performance in four priority areas, to identify potential opportunities to improve performance and to start the discussion on areas for potential recommendations. This Assessment Mission included two large workshops in Nur-Sultan and Almaty, as well as bilateral meetings and focus groups. Due to the outbreak of the pandemic, the OECD then delivered Recommendations Consultations (June 2020) virtually, in order to test and refine a list of draft recommendations and to identify specific actions that needed to be undertaken. Following this process, the report was written between June 2020 and January 2021, despite a rapidly evolving socio-economic situation.

The performance of Kazakhstan's skills system

The OECD Skills Strategy Dashboard provides an overview of the relative performance of countries across the first two dimensions of the OECD Skills Strategy: developing relevant skills over the life course and using skills effectively in work and society (as presented in Figure 1.3). For each dimension, there are a number of indicators, some of which are composite indicators, which provide a snapshot of each country's performance (see Annex 1.A in the full report for the indicators). The dashboard covers all OECD countries plus Ecuador, Kazakhstan and Peru.

Figure 1.3 shows the performance of Kazakhstan in comparison with a selection of eastern European, western European, and upper middle income countries.

Figure 1.3. OECD Skills Strategy Dashboard: Kazakhstan and selected countries



Note: These summary indicators are calculated as a simple average of a range of underlying indicators (see Annex 1.A in the full report). All underlying indicators have been normalised in a way that implies that a higher value and being among the “top 20%” reflects better performance. An “x” indicates insufficient or unavailable data, and dotted circles indicate missing data for at least one underlying indicator. The dashboard includes OECD countries, plus Ecuador, Kazakhstan and Peru.

Source: The dashboard relies on comparable cross-country data from OECD surveys such as the Programme for International Student Assessment (PISA) and the Survey of Adult Skills (PIAAC).

Developing relevant skills

Youth’s skills are being developed inclusively, but overall performance could improve

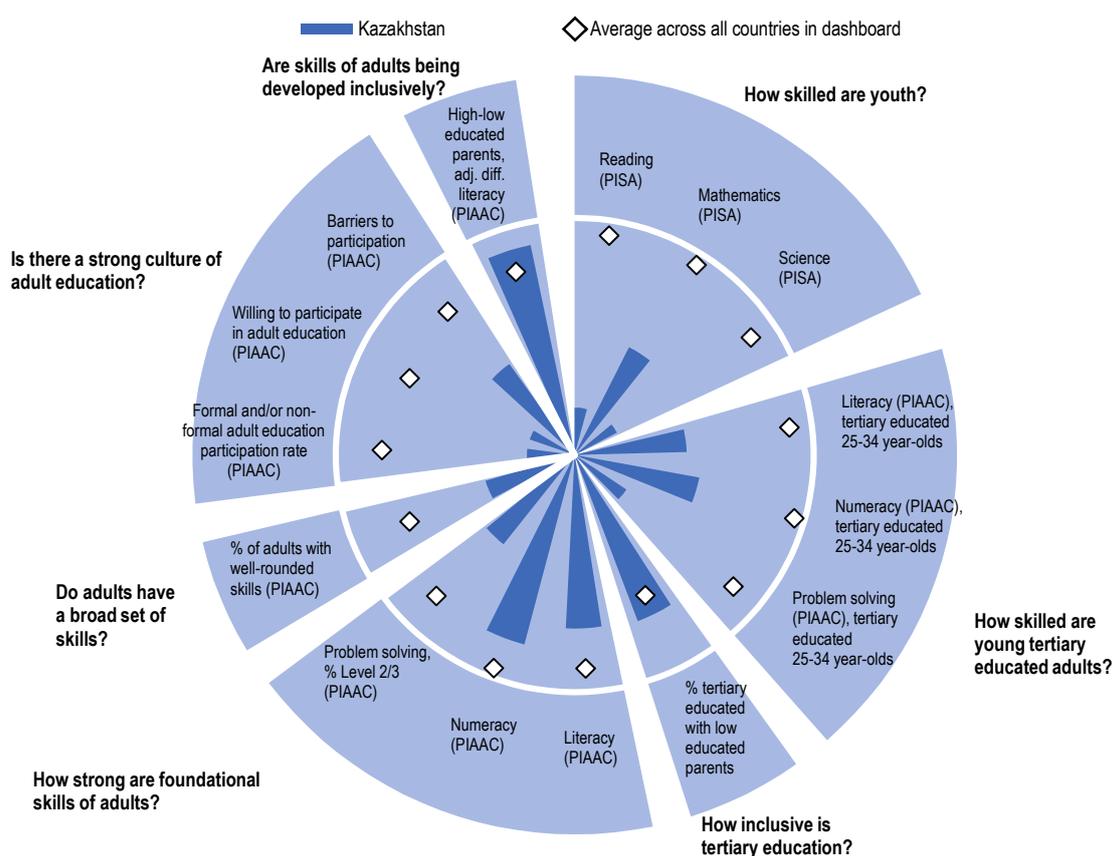
According to the Programme for International Student Assessment (PISA), the skills of youth in Kazakhstan are being developed inclusively, with a comparatively small gap in performance between students from different socio-economic backgrounds. Socio-economically advantaged students outperformed disadvantaged students in reading by 40 points in PISA 2018, compared to a difference of 89 points across OECD countries. Socio-economic difference explained just 2% of the variation in mathematics performance and 3% of the variation in science performance, compared to 14% and 13%, respectively, in OECD countries (OECD, 2019_[25]).

However, the skills of youth in reading, mathematics and science in Kazakhstan are substantially below average, when compared to the countries presented in the OECD Skills Strategy Dashboard (see

Figure 1.4), with a low share of high performers in all three subjects. Nonetheless, youth in Kazakhstan perform in line with their peers in other upper middle income countries, such as Mexico and Turkey (OECD, 2019_[26]).

Figure 1.4. Kazakhstan's performance on key indicators for developing relevant skills

Relative position in country ranking (based on normalised scores), where higher value reflects better performance



How to read this figure: The normalised scores indicate the relative performance across countries in the dashboard: the further away from the core of the chart, the better the performance. For example, the indicator “Willing to participate in adult education (PIAAC)” has a low score compared to the average, indicating a share of employees willing to participate near the bottom of the ranking.

Note: The average is based on the sample of countries/regions featured in the OECD Skills Strategy Dashboard.

Source: See Annex 1.A in the full report for an explanation of the sources and methodology.

StatLink  <https://doi.org/10.1787/888934233416>

Kazakhstan has an inclusive tertiary education system, but the skills of young tertiary graduates could improve

Kazakhstan also has one of the most inclusive tertiary education systems across countries considered in the OECD Skills Strategy Dashboard (see Figure 1.4). A comparatively large share of young tertiary graduates come from households where parents did not attend university. However, there is much room to improve the quality of tertiary education in Kazakhstan. Young tertiary graduates in Kazakhstan score more than 30 points below the OECD average in numeracy and literacy (see the “How skilled are young tertiary-educated adults?” indicator in Figure 1.4). This reflects relatively small differences in the skills

proficiency of tertiary-educated adults and adults with less than upper secondary education. The gap in proficiency is just 22 points in literacy and 19 points in numeracy, compared to an OECD gap of 61 score points in literacy and 70 score points in numeracy (OECD, 2019^[27]). However, these levels of literacy and numeracy skills are similar to those of other upper middle income countries, such as Mexico and Peru.

Kazakhstan has a weak culture of adult learning

According to the PIAAC data, Kazakhstan's participation rate in formal and/or non-formal education is below all OECD countries and below every other country surveyed, such as Peru and Russia (see Figure 1.4). Similarly, the proportion of adults not wanting to engage in training is also the highest of all countries surveyed. Adults have fewer opportunities to develop foundational skills and a broad set of skills later in life. This is reflected in the results of the OECD Skills Strategy Dashboard. Foundational skills of adults in Kazakhstan are weaker than the average across countries in the dashboard, and adults tend not to develop a broad skillset (see Figure 1.4). For instance, 30% of adults across all countries covered in the OECD Skills Strategy Dashboard have high problem-solving skills, compared to just 14% in Kazakhstan. Nonetheless, Kazakhstan does perform better than other upper middle income countries with respect to the strength of its adults' foundational skills, and Kazakhstan has recently made efforts to strengthen the culture of adult learning through initiatives such as the State Programme of Productive Employment and Mass Entrepreneurship Development 2017-2021 (*Enbek*) (see "The policy context in Kazakhstan" below).

Using skills effectively

The activation of skills in the formal labour market could improve

Kazakhstan seems to fare better in activating the skills of its labour force than the OECD average, major emerging economies and neighbouring countries (see Figure 1.5). In 2018, the employment rate of the population (aged 15-64 years) in Kazakhstan was much higher than the OECD average (65.7% versus 55.9%), while unemployment (4.8% versus 6.8%) and inactivity rates (30.9% versus 40%) were significantly lower.

However, evidence suggests that youth, older workers, low-skilled individuals and people with disabilities are considerably more likely than other population groups to work informally or be self-employed. In 2019, about 7.4% of young people were not in employment, education or training (NEET). In addition, older people in Kazakhstan (conventionally defined as workers in the 55-64 age bracket) show inactivity rates higher than the OECD average (42.4% versus 38.9%), while at the same time employment rates are lower (54.8% vs. 58.1%). As in many OECD countries, in Kazakhstan, low-skilled people struggle more to enter the labour market. People with primary education or below generally have much higher inactivity (92% versus 20%) and lower employment (8% versus 76%) rates than people with higher education, for example, but lower unemployment rates (reflecting very low participation rates). The employment rate of people with disabilities is comparatively low in Kazakhstan, despite the fact that most of them have some capacity to work. At 22%, in Kazakhstan, the employment rate of people with disabilities compares poorly to the OECD-European average of 46.9%, despite the fact that roughly 61% of disabled people are of working age and only 8.9% are fully disabled (defined as between 80% and 100% loss of work capacity) (OECD, 2017^[28]). Women in Kazakhstan have significantly lower employment rates than men (60.6% versus 73.2%), resulting primarily from much higher inactivity rates (34% versus 23.1%), and their unemployment rates are also higher (5.6% versus 4.4%).

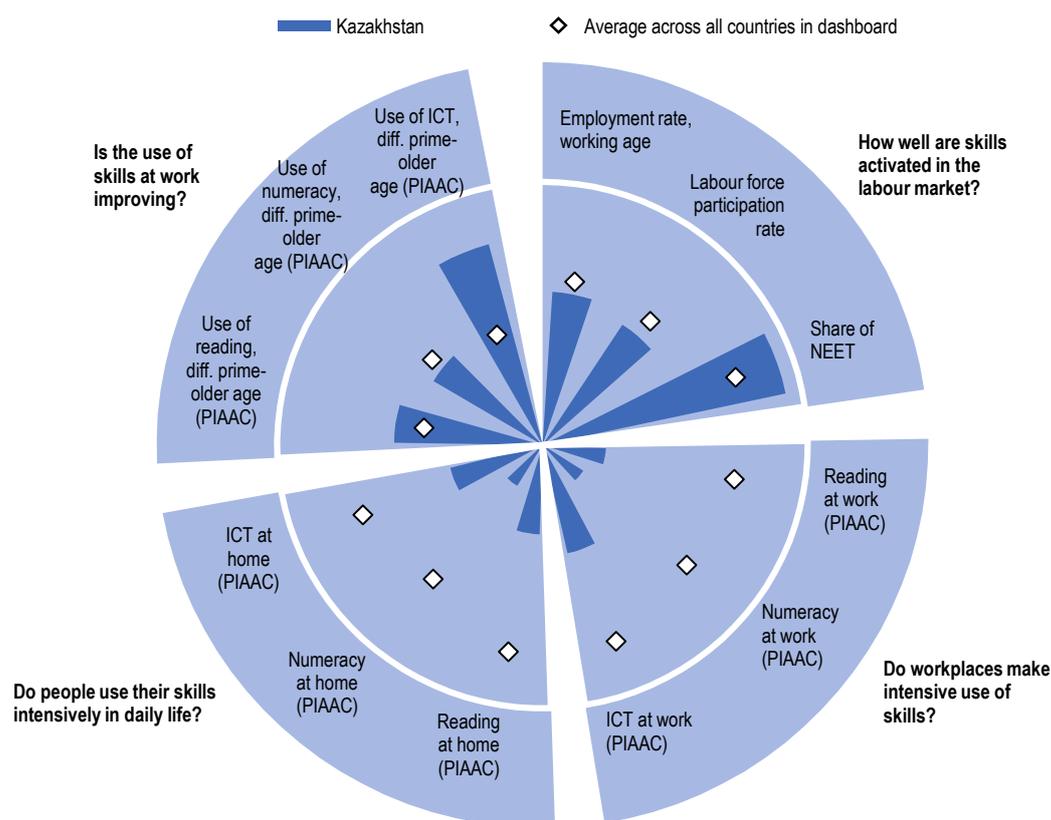
The severe consequences of the coronavirus (COVID-19) pandemic on the labour market and its negative impacts on employment, has made ensuring skills activation an even more urgent policy priority. As mentioned earlier, while the virus respects no borders or socio-economic groups, its spread has disproportionately affected the most vulnerable, either directly because of greater difficulty in protecting

themselves, or indirectly via the impact of the lockdown on their jobs (e.g. low-skilled, temporary jobs) (OECD, 2020^[11]).

Despite some signs of improvement, skills are not used intensively in the workplace or in daily lives

Figure 1.5. Kazakhstan's performance on key indicators for using skills effectively

Relative position in country ranking (based on normalised scores), where higher value reflects better performance.



How to read this figure: The normalised scores indicate the relative performance across countries in the dashboard: the further away from the core of the chart, the better the performance. For example, indicator "Numeracy at work (PIAAC)" indicates a low score compared to the average, indicating a share of workers using numeracy skills in the workplace near the bottom of the ranking.

Note: The average is based on the sample of countries/regions featured in the OECD Skills Strategy Dashboard.

Source: See Annex 1.A in the full report for an explanation of the sources and methodology.

StatLink  <https://doi.org/10.1787/888934233435>

Regular use of ICT, numeracy and literacy skills are important for maintaining and developing skills. The intensity of skills use both in everyday life and at home is considerably lower in Kazakhstan than the average across countries considered in the OECD Skills Strategy Dashboard (see Figure 1.5). Indeed, Kazakhstan is at the bottom of the index of intensity of engagement in numeracy practices in everyday life and work (OECD, 2019^[21]). Over 20% of adults report using no numeracy skills in everyday life, and 26% say they do not engage in numeracy practices at work, compared to OECD averages of 4% and 15%, respectively. However, the use of skills at work has been improving rapidly, in particular with regard to ICT skills use.

Strengthening the governance of skills systems

The OECD Skills Strategy (2019^[13]) identifies four pillars on which well-functioning governance arrangements are built: integrated information systems, strong co-ordination across the whole of government, effective stakeholder engagement, and aligned and co-ordinated financing arrangements. These four pillars can be considered as enabling conditions to ensure the development and use of skills.

- **Integrated information systems** that collect and disseminate relevant information are critical to ensuring that governments and stakeholders are able to make informed choices about skills policies.
- **Co-ordination across the whole of government** includes both “vertical” co-ordination between different levels of government as well as “horizontal” co-ordination between different departments of government that are either directly responsible for skills policy or influence skills policies. The presence of effective co-ordination mechanisms helps ensure that skills initiatives are coherent and mutually reinforcing.
- **Engaging stakeholders** emerges from the complexity of policy actions that need to be undertaken to achieve a strong skills system. Policy makers dealing with complex policy choices can benefit from the expertise and knowledge of stakeholders, allowing for more effective forms of policy making. Engaging stakeholders can also enhance the political legitimacy of policy-making decisions.
- **Aligning and co-ordinating financing arrangements** is crucial to ensure countries provide adequate resources for skills policies as well as for steering those investments in ways that better match skills supply with demand.

Kazakhstan can build a more effective skills information system

A skills information system (SIS) can be defined as the set of fundamental arrangements, facilities and procedures supporting the collection, process and dissemination of skills and labour market information. It includes information on current and future labour market needs gathered by skills assessment and anticipation (SAA) exercises, as well as information on current vacancies, study and training opportunities for individuals. An effective SIS can provide useful input to inform decision making by a broad range of actors, including policy makers, students, training institutions and jobseekers. In turn, such informed decision making can contribute to reducing skills shortages and skills mismatches, which can exert a negative impact on overall economic growth, on firms and on individuals.

The development of a strong SIS requires the combination of many constituting elements, which can be challenging in many countries. At the technical level, these involve access to detailed skills and labour market data, as well as of sophisticated analytical tools to elaborate basic statistical information. At the communication and policy level, they include the capacity to disseminate the skills information to a wide range of interested stakeholders, which is essential to nurturing the policy debate and informing stakeholders’ choices. According to the evidence gathered throughout the OECD Skills Strategy project, Kazakhstan has struggled so far to bring together these constituting elements. Kazakhstan does not have a robust set of SAA tools to identify current and future labour market and skills needs. To a significant extent, this might depend on limitations in the availability and accessibility of primary data. Kazakhstan has also had difficulties in disseminating results from the existing SAA tools and the available information on current vacancies, study and training opportunities among stakeholders and individuals.

Kazakhstan needs to adopt a whole-of-government approach to skills policies

In the last few years, Kazakhstan has transitioned to a more inclusive governance model with increasing opportunities for exchange and dialogue among government ministries, and between central and local

government (UNESCO, 2020_[29]). However, according to the evidence gathered throughout the OECD Skills Strategy project, there are no systemic institutional arrangements to guide horizontal co-operation and collaboration on skills policies. Co-operation and collaboration seem to take place on an ad hoc basis through formal mechanisms such as memorandums, based on synergies created by some projects or in the context of ambitious policy goals. Similarly, there are no strong mechanisms for vertical co-ordination and co-operation between central and local government. Furthermore, even if effective collaboration and co-operation arrangements are in place, countries need to put in place effective monitoring and evaluation mechanisms to assess the functioning of the skills system. Kazakhstan has still substantial room for improvement in this direction. According to the evidence gathered throughout the project, there are limited resources for the assessment and monitoring of government policies, and very few evaluations are carried out across the different areas of the skills system. For example, evaluations on the impact of active labour market programmes are not common in Kazakhstan, making it difficult to understand which programmes deliver the best value for money.

Kazakhstan needs to continue improving stakeholder engagement

Kazakhstan has made progress in strengthening stakeholder engagement in policy development in recent years. For instance, Kazakhstan has made increasing use of dialogue and stakeholder co-operation practices, engaging civil society and citizens in public consultations (UNESCO, 2020_[29]). Employers and trade unions have also been increasingly active in trying to shape the direction and implementation of skills policies. However, according to information gathered throughout the OECD Skills Strategy project, the approach to stakeholder engagement to inform policy development needs to be more unified and systematic. In particular, discussions with employers and trade unions seem to happen on an ad hoc basis, rather than following a structured process. Better co-ordination of stakeholder engagement is particularly important to make further progress on the development of the National Qualifications System (NQS), which has been a policy priority for Kazakhstan but has stalled over the last few years.

Kazakhstan should strengthen financing arrangements

Kazakhstan can also strengthen financing arrangements for skills policies. Currently, Kazakhstan seems to under-invest in skills policies, compared to other countries (World Bank, 2020_[30]). According to World Bank data, Kazakhstan spends approximately 3.4% of GDP on primary, secondary and tertiary education. This is below the OECD average (4.6%), neighbouring countries such as Uzbekistan (5.7%) and Tajikistan (5.2%) and upper middle income countries such as Mexico (6.2%) and Peru (6.9%). Evidence gathered throughout the project also suggests that Kazakhstan seems to under-invest in ALMPs and adult learning. To some extent, improving the funding for skills policies will depend on increasing financial contributions from employers, by strengthening the use of financial incentive schemes. The evidence gathered during the OECD Skills Strategy project suggests that Kazakhstan is making limited use of financial incentives, such as tax deductions, subsidies and levies, which can help increase investment from employers on skills development.

The policy context in Kazakhstan

Kazakhstan has already implemented a range of strategies and reforms to create a skills architecture capable of addressing many of the aforementioned challenges (see Annex Table 1.B.1 and Annex Table 1.B.2 in the full report).

In 2012, Kazakhstan launched its overarching strategy for the development of the country, Kazakhstan 2050, setting the long-run objective of transforming the country into one of the top 30 most developed economies in the world by 2050. The three key aims of the strategy are to define new areas where Kazakhstan can form productive partnerships and create new sources of economic growth, create

a favourable investment climate, and to effectively develop and modernise the public and private sectors. To achieve these aims, the strategy outlines seven long-term priorities, one of which is “Knowledge and Professional Skills” to create a modern, relevant system of lifelong learning (Strategy 2050, 2020^[31]). To deliver the Kazakhstan 2050 strategy in the medium term, the Strategic Development Plan 2025 was developed in 2017 with input from a variety of stakeholders. The development of human capital through high-quality and relevant skills training forms one of the priority tasks for this plan. The aim is to improve availability and inclusiveness of education, develop a national forecasting and qualifications system and improve short-term vocational training for the unemployed and self-employed (Government of Kazakhstan, 2017^[32]).

To supplement the long-term Kazakhstan 2050 strategy, and medium-term Strategic Development Plan 2025, Kazakhstan has designed an array of state programmes that outline specific measures for high-priority areas of the economy. The State Programme of Productive Employment and Mass Entrepreneurship Development 2017-2021 (*Enbek*) focuses on promoting productive employment and engaging citizens in entrepreneurship. It aims to support the development of entrepreneurship skills and provide micro loans and grants for entrepreneurs, while also increasing vocational education to less-skilled and unemployed individuals. The State Programme of Education and Science Development 2020-2025 also focuses on measures to improve Kazakhstan’s skills system. Some of the aims articulated here are to increase the prestige of teaching (in part through wage increases), to reduce the gap in educational achievement between urban and rural schools, and to improve lifelong learning through developing an integrated system to recognise the learning outcomes of formal and non-formal education (Press Service of the Prime Minister of Kazakhstan, 2019^[33]).

Skills development also forms a pillar of other state programmes. For example, skills are an important part of the Digital Kazakhstan State Programme 2018-2022. Improving the basic digital skills of the population is one of the initiatives listed alongside creating a digital ecosystem for businesses and the state, and encouraging businesses to adapt new technologies to increase labour productivity (Government of Kazakhstan, 2017^[34]). Skills policies are also embedded in the State Programme of Industrial-Innovation Development 2020-2025 whose goal is to facilitate increasing the export of manufacturing products, and The Roadmap for Development of National Qualifications System 2019-2025, which focuses on developing a step-by-step plan to implement a National Qualifications System (Government of Kazakhstan, 2019^[35]; 2018^[36]).

Recent reforms have started making progress towards the objectives laid out in these strategies and state programmes. Mobile employment centres were launched in 2019 to help skills activation policies reach more vulnerable individuals. Also, in 2019, the concept of non-formal education was officially recognised in legislation and in 2020, moves were made to increase the accessibility of educational institutions to people with disabilities. To improve Kazakhstan’s skills information system, the employment centres’ vacancy database has been integrated into the Electronic Labor Exchange, a central web portal for job search and recruitment. In terms of governance of the skills system, two new bodies were established in 2019 to improve co-operation on skills policy: the National Council for Development of the Social and Labour Sector (NCDSLS) and the National Council of Public Trust. The latter body ensures that representatives from local communities, non-governmental organisations (NGOs) and other stakeholders can express their views on skills issues.

Priority areas and recommendations

The OECD has established a fruitful collaboration with Kazakhstan over the past few years. A number of projects have already provided recommendations and insights on how to strengthen different areas of Kazakhstan’s skills system, including higher education (HE) policies, labour market policies and initiatives to foster skills use, especially in small and medium-sized enterprises (SMEs). A recent OECD project has

also looked in detail at measures to strengthen education evaluation and assessment policies (see Annex Table 1.B.3 in the full report). Considering this existing body of work, the assessment of the performance of Kazakhstan's skills system and feedback from the Government of Kazakhstan, four priority areas have been identified for the Skills Strategy project in Kazakhstan:

- Improving the activation of skills of vulnerable populations (Chapter 2 in the full report)
- Fostering participation in adult learning of all forms (Chapter 3 in the full report)
- Building an effective skills information system (Chapter 4 in the full report)
- Strengthening the governance of the skills system (Chapter 5 in the full report).

Based on in-depth desk analysis, stakeholder workshops, pre-workshop surveys, discussion groups and several bilateral meetings in Kazakhstan, the OECD has selected opportunities and developed recommendations for Kazakhstan in each of the priority areas. The summaries below highlight the key findings and recommendations for each priority area. The chapters themselves present the complete findings and describe the recommendations in more detail, in addition to providing international best practices.

Improving the activation of skills of vulnerable populations

Skills activation policies play a crucial role in supporting the employment of vulnerable populations and ensuring inclusive growth. In Kazakhstan, activating the skills of those most exposed to the risk of falling into long-term unemployment, particularly youth, older workers and people with disabilities, is a key priority. During economic downturns, such as the one caused by COVID-19, policies to support activation are particularly important. Those working in non-standard jobs, often at a low income (e.g. self-employed workers, temporary or part-time workers), are most at risk of economic dislocation since these jobs are over-represented in the sectors most affected by the pandemic. Strengthening skills activation in the short term will be crucial to ensuring that these vulnerable groups are not left behind.

Opportunity 1: Improving the accessibility and quality of public employment centres

Accessible and responsive employment centres are key to disseminating information on available active labour market programmes and delivering job-matching services to activate vulnerable populations who frequently need greater support to find work. This is even more important in light of the short-term priorities imposed by the COVID-19 crisis, which require public employment services to show responsiveness by quickly and flexibly adapting to the situation. However, stakeholders consulted throughout the OECD Skills Strategy project reported that jobseekers in Kazakhstan are not, or little, motivated to register with the PES. The main reasons include low quality of services provided, cumbersome registration procedures, and lack of focus on vulnerable groups who are most in need. Building on these insights, this opportunity explores how Kazakhstan can ensure that PES continue to function during and following the COVID-19 crisis. It goes on to consider how to improve the quality of employment services and how to better reach out to vulnerable populations.

Table 1.1. Opportunity 1: Improving the accessibility and quality of public employment centres

Policy directions	Recommendations	Responsible parties
Ensuring that public employment services provide adapted responses to the circumstances imposed by the COVID-19 crisis	1.1. Adopt and utilise digital communication tools to ensure the continuation of services during and following the COVID-19 crisis.	<ul style="list-style-type: none"> • Ministry of Labour and Social Protection of Population (MLSP) • Public employment services (PES)
Continuing efforts to build institutions that effectively reach vulnerable populations	1.2. Improve jobseeker profiling tools to enable upfront intervention by allowing caseworkers to set up individual action plans.	<ul style="list-style-type: none"> • PES
	1.3. Reinforce collaboration with private employment agencies and local NGOs as a way to alleviate the capacity constraints of public employment services.	<ul style="list-style-type: none"> • PES • MLSP

Policy directions	Recommendations	Responsible parties
Improving the quality of services provided by employment centres	1.4. Increase the number of caseworkers and improve their working conditions so as to improve motivation and the quality of services provided.	<ul style="list-style-type: none"> • MLSPP
	1.5. Monitor and upgrade the quality of the job postings available in the vacancy bank.	<ul style="list-style-type: none"> • MLSPP • National Chamber of Entrepreneurs (NCE)
	1.6. Adopt proactive approaches to promote efficient job-matching services.	<ul style="list-style-type: none"> • PES

Opportunity 2: Strengthening the effectiveness of active labour market programmes for vulnerable populations

ALMPs could support skills activation in the labour market and improve skills use, by facilitating access to the labour market and good quality jobs, particularly among the most vulnerable populations. Effective ALMPs typically help enhance motivation and incentives to seek employment; improve job readiness and support in finding suitable employment; and expand employment opportunities. However, several stakeholders consulted throughout the OECD Skills Strategy project reported that very limited evaluations of the impact of ALMPs are carried out in Kazakhstan. Even when this happens, results are unlikely to be used to inform relevant policies and support progress towards good practices. In Kazakhstan's context, developing rigorous impact evaluation systems could be particularly important. In Kazakhstan, ALMPs generally have very broad eligibility criteria, and poor targeting represents an issue, implying that the system is prone to generating deadweight and substitution effects. This could reflect the over-representation of highly skilled participants, leaving little room available for the vulnerable populations who can benefit most from ALMPs. Building on these insights, this opportunity explores how Kazakhstan can improve the financing and effectiveness of ALMPs.

Table 1.2. Opportunity 2: Strengthening the effectiveness of active labour market programmes for vulnerable populations

Policy directions	Recommendations	Responsible parties
Developing rigorous impact evaluation systems on the impact of active labour market policies	1.7. Carry out a rigorous impact evaluation to assess the effectiveness of ALMPs to inform policy.	<ul style="list-style-type: none"> • Ministry of Labour and Social Protection of Population (MLSPP) • Workforce Development Centre (WDC)
Increasing expenditure on active labour market policies and their targeting	1.8. Scale up expenditure on activation programmes with a proven track record and capacity to secure the achievement of stated objectives.	<ul style="list-style-type: none"> • MLSPP • Local government
	1.9. Improve the eligibility criteria for participating in activation programmes to ensure that people most in need can access and benefit from them.	<ul style="list-style-type: none"> • MLSPP

Opportunity 3: Promoting family policies for a more equitable sharing of unpaid and paid work

Women with young children in Kazakhstan frequently face higher barriers to participating in the labour market. Stakeholders consulted throughout the project identified a range of barriers that prevent young mothers from returning to work, including lack of quality and affordable childcare facilities, traditional social norms and gender stereotypes. Family-friendly policies that allow a more equitable sharing of unpaid and paid work have an essential role to play in facilitating female labour market participation and the use of their skills. Building on these insights, this opportunity explores how Kazakhstan can activate young women's skills by promoting affordable and quality childcare services, flexible leave and work options, and by tackling gender stereotypes.

Table 1.3. Opportunity 3: Promoting family policies for a more equitable sharing of unpaid and paid work

Policy directions	Recommendations	Responsible parties
Improving access to quality childcare services	1.10. Increase the supply of affordable, high-quality childcare facilities.	<ul style="list-style-type: none"> • Government of Kazakhstan • Ministry of Labour and Social Protection of Population (MLSPP) • Committee on Youth and Family Affairs under the Ministry of Information and Public Development (MIPD)
	1.11. Strengthen financial incentives for young parents to access childcare using child-related cash transfers and subsidies.	<ul style="list-style-type: none"> • Government of Kazakhstan
Promoting flexible leave and work options	1.12. Facilitate the uptake of flexible leave options and encourage their use among employers.	<ul style="list-style-type: none"> • Committee on Youth and Family Affairs under MIPD • MLSPP • National Chamber of Entrepreneurs (NCE)
	1.13. Facilitate the uptake of flexible work options (e.g. part-time work, flexible working hours) for young parents.	<ul style="list-style-type: none"> • Committee on Youth and Family Affairs under MIPD • MLSPP • NCE
	1.14. Promote social awareness campaigns to address gender stereotypes.	<ul style="list-style-type: none"> • Committee on Youth and Family Affairs under MIPD • MLSPP • NCE • Local government • NGOs

Fostering participation in adult learning of all forms

Across all countries, participation in adult learning has significant benefits for individuals, employers and society as a whole, including higher wages, higher productivity for enterprises and higher levels of social trust. Throughout this project, the OECD has provided support for identifying how to adapt the supply of adult learning opportunities to help companies and individuals cope better with the social distancing measures made necessary by the COVID-19 crisis. In the longer term, fostering participation in adult learning of all forms can help Kazakhstan move away from a low-skill equilibrium towards high-productivity and high-skill activities. This shift will increase the adaptability of Kazakhstan's workforce and support current efforts to diversify the economy away from natural resources exploitation, making Kazakhstan's economy and society more resilient and responsive to the impact of megatrends.

Opportunity 1: Strengthening the supply and quality of adult learning opportunities

High levels of participation in adult learning require a supply of opportunities tailored to the needs of individuals and employers. Adult learning also needs to be of high quality to ensure that it results in real skills gain for individuals. However, stakeholders consulted throughout the OECD Skills Strategy project considered that there are gaps in the supply of adult learning in Kazakhstan and that there is no well-developed system of quality assurance for non-formal learning. Building on these insights, this opportunity explores how Kazakhstan can strengthen the supply of adult learning opportunities and improve the quality assurance of non-formal adult learning opportunities.

Table 1.4. Opportunity 1: Strengthening the supply and quality of adult learning opportunities

Policy directions	Recommendations	Responsible parties
Strengthening the supply of adult learning	2.1. Strengthen the provision of courses to improve foundational skills, especially in rural areas, by integrating them into existing programmes and introducing new delivery models.	<ul style="list-style-type: none"> Ministry of Labour and Social Protection of Population (MLSPP) Ministry of Education and Science (MOES)
	2.2. Extend access to higher education opportunities for adults, by expanding part-time, modular and online delivery models.	<ul style="list-style-type: none"> MOES Higher education institutions
Improving the quality assurance system for non-formal adult learning opportunities	2.3. Introduce a strong certification and monitoring system to certify the quality of non-formal adult learning opportunities.	<ul style="list-style-type: none"> MOES
	2.4. Provide guidance and training opportunities to training providers on how to implement the quality standards.	<ul style="list-style-type: none"> MOES

Opportunity 2: Increasing motivation to engage in adult learning

Strengthening the supply and quality of adult learning opportunities is insufficient on its own to raise participation. Individuals and employers need to be strongly motivated to engage in adult learning. Stakeholders involved in consultations throughout the project reported that adults and employers in Kazakhstan typically have low levels of motivation to engage in learning. This opportunity describes two policy directions to make progress in this respect. First, it explores how Kazakhstan can create a consensus among stakeholders and individuals about the importance of adult learning. Then, it considers how Kazakhstan can increase large employers' commitment to adult learning.

Table 1.5. Opportunity 2: Increasing motivation to engage in adult learning

Policy directions	Recommendations	Responsible parties
Creating a consensus about the importance of adult learning	2.5. Develop a shared vision on the importance of adult learning based on extensive consultations with stakeholders.	<ul style="list-style-type: none"> Government of Kazakhstan Ministry of Education and Science (MOES) Ministry of Labour and Social Protection of Population (MLSPP) Adult learning inter-ministerial working group (see Chapter 5) Employers Trade unions Educational institutions Local government
	2.6. Consider launching a specific strategy for adult learning to foster better co-operation and co-ordination among ministries and stakeholders.	<ul style="list-style-type: none"> Government of Kazakhstan
	2.7. Raise awareness about adult learning opportunities among individuals through a series of targeted campaigns and events.	<ul style="list-style-type: none"> Adult learning inter-ministerial working group (see Chapter 5) MOES MLSPP
Increasing large employers' commitment to adult learning	2.8. Review training plans in state-owned enterprises to ensure that they enable all employees to develop a broad set of technical, foundational and soft skills.	<ul style="list-style-type: none"> Government of Kazakhstan State-owned enterprises
	2.9. Legislate the introduction of works councils in order to foster social dialogue about job-related training and adult learning.	<ul style="list-style-type: none"> Government of Kazakhstan Trade unions

Opportunity 3: Removing barriers to participation in adult learning

Even when individuals and employers are motivated to participate in adult learning, they often continue to face barriers that prevent them from transitioning from an interest to active participation. Minimising these barriers is crucial to raising participation in adult learning. For adults, the key barriers are generally related

to cost and time. People with disabilities, however, might also face physical and psychological barriers that prevent them from accessing education and training facilities. Among employers, SMEs might lack sufficient knowledge, time and financial resources to provide training opportunities. Stakeholders consulted throughout the OECD Skills Strategy project stressed the importance of minimising barriers both for individuals and for SMEs. Building on their feedback and international evidence, this opportunity discusses how Kazakhstan can remove physical, financial and time-related barriers for individuals. Then, it considers how Kazakhstan can minimise information and financial barriers for SMEs.

Table 1.6. Opportunity 3: Removing barriers to participation in adult learning

Policy directions	Recommendations	Responsible parties
Removing barriers to adult learning for individuals	2.10. Increase incentives and support offered to adults with disabilities to minimise barriers that prevent them from accessing learning opportunities.	<ul style="list-style-type: none"> Government of Kazakhstan Adult learning inter-ministerial working group (see Chapter 5)
	2.11. Extend financial incentives beyond vulnerable groups to minimise cost-related barriers to participating in education and training.	<ul style="list-style-type: none"> Ministry of Labour and Social Protection of Population (MLSPP) Ministry of Education and Science (MOES) Ministry of National Economy (MNE)
	2.12. Consider introducing training leave legislation and compensatory mechanisms to increase take-up of learning among adults who currently report being too busy at work.	<ul style="list-style-type: none"> Government of Kazakhstan
Reducing informational and financial barriers for SMEs	2.13. Establish local training networks to reduce financial barriers for SMEs, especially in under-performing rural regions.	<ul style="list-style-type: none"> MNE National Chamber of Entrepreneurs (NCE)
	2.14. Introduce training facilitators to help SMEs assess their training needs and develop their training plans.	<ul style="list-style-type: none"> MNE NCE
	2.15. Introduce loans or grants to enable SMEs to upskill and reskill their workforce in the context of the Industry 4.0 transformation.	<ul style="list-style-type: none"> MNE NCE

Building an effective skills information system

An effective SIS plays a key role in reducing skills shortages and mismatches by providing information on current and future skills needs and career and learning opportunities. This can be used to inform a broad range of policies, from employment to education and training, along with policies targeted at the most vulnerable. Timely skills information is particularly important during economic downturns, which is characterised by rapidly changing labour markets. This includes the COVID-19 crisis, which had led to varying skills demand across sectors, with demand increasing rapidly in some “essential” services and decreasing in others.

Opportunity 1: Strengthening skills assessment and anticipation tools

SAA exercises are a crucial component of a skills information system because they are the main tools needed to generate information on current and future labour market and skills needs. Information on current and future skills needs, in combination with strong policies and impactful programmes, can help policy makers and stakeholders minimise skills imbalances. Rigorous analytical methodologies and instruments underpinning SAA tools are key to producing reliable, informative and relevant information on current and future skills needs. To maximise the utilisation of skills analysis, it is important to ensure that skills assessment and anticipation results are not only reliable and up to date but also relevant to the needs of different users. Building on these insights, this opportunity provides recommendations on how Kazakhstan can strengthen skills assessment and anticipation methodologies to better identify and support skills and job-matching needs. Then, it explores how Kazakhstan can produce skills analysis results that are more relevant to end users.

Table 1.7. Opportunity 1: Strengthening skills assessment and anticipation tools

Policy directions	Recommendations	Responsible parties
Strengthening skills assessment and anticipation methodologies to better identify and support skills and job-matching needs	3.1. Carry out a stocktaking analysis of existing SAA tools.	<ul style="list-style-type: none"> Ministry of Labour and Social Protection of Population (MLSP) Workforce Development Center (WDC)
	3.2. Adopt an integrated approach by combining qualitative and quantitative methods to achieve robust skills analysis results.	<ul style="list-style-type: none"> MLSP WDC
Producing skills assessment and anticipation results that are more relevant to end users	3.3. Promote dialogue among relevant ministries, sectoral and regional experts throughout the process of production of SAA tools.	<ul style="list-style-type: none"> MLSP Inter-ministerial working group on skills and labour market information (see Chapter 5)

Opportunity 2: Creating an enabling environment for an effective skills information system

Creating an enabling environment is crucial to establishing and operating an effective SIS. This enabling environment requires, first of all, access to timely and high-quality labour market and skills data. Without prompt and secure access to such data, it becomes difficult for researchers and policy makers to evaluate the impact of skills policies, generate new evidence to inform policy development or carry out skills assessment and anticipation exercises. However, data also need to be processed and analysed to generate meaningful insights. This requires human resources with knowledge and skills in both qualitative and quantitative data analysis. According to stakeholders consulted during the OECD Skills Strategy project, Kazakhstan has so far struggled across both dimensions. Building on these findings, this opportunity first explores how Kazakhstan can improve the quality and accessibility of data on skills and the labour market. Then, it considers how Kazakhstan can develop the human resources it needs to build an effective SIS.

Table 1.8. Opportunity 2: Creating an enabling environment for an effective skills information system

Policy directions	Recommendations	Responsible parties
Improving the quality and accessibility of data on skills and the labour market	3.4. Improve the frequency and coverage of quality data on skills and labour markets by strengthening statistical surveys and expanding administrative data collection.	<ul style="list-style-type: none"> Bureau of National Statistics
	3.5. Strengthen access to microdata in a secure way, for instance, by gathering anonymised datasets in a centralised digital portal.	<ul style="list-style-type: none"> Bureau of National Statistics
Developing the human resources needed to build an effective skills information system	3.6. Provide adequate training opportunities to key actors, including policy makers and researchers involved in processing and analysing data on skills and the labour market.	<ul style="list-style-type: none"> Government of Kazakhstan
	3.7. Raise the attractiveness of careers related to the analysis of labour market and skills data, by improving the quality of the learning environment and offering financial incentives to prospective tertiary students.	<ul style="list-style-type: none"> Ministry of Education and Science (MOES) Ministry of Labour and Social Protection of Population (MLSP)

Opportunity 3: Enhancing the use of skills analysis exercises to inform policy making and stakeholders' choices

The information generated by a skills information system should be effectively disseminated among a variety of users, including policy makers, social partners and individuals. However, reaching this broad audience successfully requires choosing relevant communication channels (e.g. online portals and/or seminars) and tailoring information to the target audience. Career guidance could also play an important role in providing information on skills demands as well as on training and learning opportunities to help individuals make informed career decisions. This opportunity provides recommendations on how Kazakhstan can enhance the use of skills information in decision making. First, it considers how

Kazakhstan can promote sufficient dissemination of skills and labour market information among all relevant audiences. Then, it explores how Kazakhstan can use skills information to improve career guidance services.

Table 1.9. Opportunity 3: Enhancing the use of skills analysis exercises to inform policy making and stakeholders' choices

Policy directions	Recommendations	Responsible parties
Promoting sufficient dissemination of skills and labour market information among all relevant audiences	3.8. Develop diverse communication and awareness mechanisms to reach out to all relevant users.	<ul style="list-style-type: none"> Ministry of Labour and Social Protection of Population (MLSPP) Work Development Center (WDC) Inter-ministerial working group on skills and labour market information (see Chapter 5)
	3.9. Tailor the presentation of the information to the needs of a diverse audience in order to ensure relevance.	<ul style="list-style-type: none"> MLSPP WDC Inter-ministerial working group on skills and labour market information (see Chapter 5)
Using skills information to support career guidance services	3.10. Introduce a consolidated portal to provide all individuals with access to information on skills needs, labour market trends and the availability of study/work opportunities.	<ul style="list-style-type: none"> Inter-ministerial working group on skills and labour market information (see Chapter 5) MLSPP
	3.11. Organise career guidance forum to gather various stakeholders to ensure career guidance is provided in a co-operative manner, based on skills analysis of current and future skills needs.	<ul style="list-style-type: none"> Inter-ministerial working group on skills and labour market information (see Chapter 5) Ministry of Education and Science (MOES) MLSPP

Strengthening the governance of the skills system

Effective governance arrangements are central to supporting skills policies. Effective horizontal and vertical co-operation and collaboration arrangements are crucial to ensuring that countries develop and implement policies that are coherent and mutually reinforcing. Strong mechanisms to engage stakeholders enable policy makers to gain information regarding the real-world effects of policies and regulations. Aligned and co-ordinated financing arrangements help ensure that countries provide adequate resources for skills policies, which are then distributed efficiently and equitably. Effective co-operation and collaboration, strong stakeholder engagement mechanisms and co-ordinated financing arrangements are also important to develop policy responses to the economic crisis resulting from the COVID-19 pandemic, as well as many other cross-cutting policy challenges.

Opportunity 1: Strengthening co-ordination and co-operation across the whole of government

Horizontal co-ordination and co-operation on skills policies at the central government level are fragmented in Kazakhstan and tend to rely on formal mechanisms, such as memorandums or formal bodies. Kazakhstan has also faced difficulties in adopting effective monitoring and evaluation mechanisms to assess the functioning of its skills system. Building on these findings, this opportunity first explores how to improve horizontal and vertical co-ordination and co-operation on skills policies. It then considers how Kazakhstan can implement better monitoring and assessment practices with regard to evaluating the effectiveness of skills policies and monitoring the quality of education and training institutions.

Table 1.10. Opportunity 1: Strengthening co-ordination and co-operation across the whole of government

Policy directions	Recommendations	Responsible parties
Improving co-operation and collaboration on skills policies	4.1. Strengthen the remit of the National Council for Development of Social and Labour Sector by specifying a clearly defined mandate and introducing a combination of inter-ministerial working groups and technical bodies.	<ul style="list-style-type: none"> Government of Kazakhstan National Council for Development of Social and Labour Sector (NCDSLS) All ministries involved in skills policies (Ministry of Labour and Social Protection of Population [MLSP], Ministry of Education and Science [MOES], Ministry of Finance [MF], Ministry of National Economy [MNE])
	4.2. Gradually increase the responsibilities and capacities of local government in delivering skills policies, starting with the launch of regional skills strategies.	<ul style="list-style-type: none"> Government of Kazakhstan Local government Local branches of the MLSP and MOES National Chamber of Entrepreneurs (NCE) Representatives of educational institutions
Implementing better monitoring and evaluation mechanisms	4.3. Establish a common evaluation and assessment framework for skills policies to help inform future strategies, through an inter-ministerial working group.	<ul style="list-style-type: none"> Government of Kazakhstan All ministries involved in skills policies (MLSP, MOES, MF, MNE)
	4.4. Develop common principles for the quality assurance of educational institutions and training providers via an intra-ministerial working group within the Ministry of Education and Science.	<ul style="list-style-type: none"> MOES

Opportunity 2: Strengthening stakeholder engagement in skills policies

Improving co-ordination and co-operation across governmental actors is not all that is required for strong governance of skills policies. Kazakhstan also needs to better co-ordinate stakeholder engagement to make further progress in the development of the National Qualifications System, which is considered a policy priority by the government. More broadly, Kazakhstan can more systematically involve employers and trade unions in policy development and implementation, while making further progress in engaging representatives from civic society in the debate on skills policies. In light of these insights, this opportunity first explores how to strengthen stakeholder engagement in the development of the NQS. Then, it considers how to improve stakeholder engagement throughout the policy cycle.

Table 1.11. Opportunity 2: Strengthening stakeholder engagement in skills policies

Policy directions	Recommendations	Responsible parties
Strengthening stakeholder engagement in the development of the National Qualifications System (NQS)	4.5. Introduce a technical body to co-ordinate the development of the NQS.	<ul style="list-style-type: none"> Government of Kazakhstan National Council for Development of Social and Labour Sector (NCDSLS)
	4.6. Review the functioning of the sector skills councils to ensure that they have sufficient resources and capacities to support the development of the NQS.	<ul style="list-style-type: none"> NCDSLS Technical body to co-ordinate the NQS development (if introduced)
Improving stakeholder engagement throughout the policy cycle	4.7. Strengthen mechanisms to engage stakeholders in policy development, for instance, by improving stakeholder participation in the National Council for Development of the Social and Labour Sector.	<ul style="list-style-type: none"> Government of Kazakhstan NCDSLS Tripartite Republican Commission Inter-ministerial working groups (if introduced) All ministries involved in skills policies (Ministry of Labour and Social Protection of Population [MLSP], Ministry of Education and Science [MOES], Ministry of Finance [MF], Ministry of National Economy [MNE])

Policy directions	Recommendations	Responsible parties
	4.8. Develop a single digital platform to promote exchange on skills policies between the central government and external stakeholders.	<ul style="list-style-type: none"> All ministries involved in skills policies (MLSPP, MOES, MF, MNE) NCDLS
	4.9. Strengthen the adoption of public-private partnerships to improve employer involvement in the provision of education and training by improving the legislative framework and disseminating good practices.	<ul style="list-style-type: none"> Government of Kazakhstan MNE MLSPP MOES

Opportunity 3: Better aligning and co-ordinating financing arrangements

Effective co-ordination and co-operation across government and with stakeholders need the support of strong financing arrangements. Kazakhstan does not seem to provide sufficient public funding to education when compared to neighbouring countries, other upper middle income countries and top-performing OECD countries. In addition, Kazakhstan makes limited use of financial incentives, such as tax deductions, subsidies and levies, which can help increase investment from employers on skills development. Building on these findings, this opportunity explores how to strengthen public funding arrangements for skills policies. Then, it discusses how to better use incentives for engaging the private sector in skills development.

Table 1.12. Opportunity 3: Better aligning and co-ordinating financing arrangements

Policy directions	Recommendations	Responsible parties
Strengthening public funding arrangements for skills policies	4.10. Increase public funding in primary, secondary and tertiary education to improve skills outcomes of youth, by reallocating funding from other policy areas, raising additional tax revenue and increasing contribution from employers.	<ul style="list-style-type: none"> Government of Kazakhstan Ministry of Finance (MF)
Better using incentives to engage the private sector in skills development	4.11. Introduce a training levy to increase the financial contribution of employers to vocational education and training (VET), adult learning and ALMPs, following extensive consultations with employers.	<ul style="list-style-type: none"> Government of Kazakhstan Employer representatives (e.g. via the National Chamber of Entrepreneurs [NCE])
	4.12. Introduce subsidies to encourage employers to hire apprentices within the dual VET system.	<ul style="list-style-type: none"> Government of Kazakhstan Employer representatives (e.g. via the NCE)

Overview of main recommendations

Box 1.2. Main recommendations to strengthen Kazakhstan's skills system

Based on feedback from stakeholders and from the national project team, three recommendations have been selected for each priority area that could be considered to have the highest priority based on an assessment of potential impact, relevance in the current Kazakhstan context, as well as overall support from stakeholders for implementation.

Improving the activation of skills of vulnerable populations (Chapter 2 in the full report)

- Adopt and utilise digital communication tools to ensure the continuation of services during and following the COVID-19 crisis (Recommendation 1.1).
- Improve jobseeker profiling tools to enable upfront intervention by allowing caseworkers to set up individual action plans (Recommendation 1.2).
- Scale up expenditure on activation programmes with a proven track record and capacity to secure the achievement of stated objectives (Recommendation 1.8).

Fostering participation in adult learning of all forms (Chapter 3 in the full report)

- Introduce a strong certification and monitoring system to certify the quality of non-formal adult learning opportunities (Recommendation 2.3).
- Develop a shared vision on the importance of adult learning based on extensive consultations with stakeholders (Recommendation 2.5).
- Review training plans in state-owned enterprises to ensure that they enable all employees to develop a broad set of technical, foundational and soft skills (Recommendation 2.8).

Building an effective skills information system (Chapter 4 in the full report)

- Adopt an integrated approach by combining qualitative and quantitative methods to achieve robust skills analysis results (Recommendation 3.2).
- Improve the frequency and coverage of quality data on skills and labour markets, by strengthening statistical surveys and expanding administrative data collection (Recommendation 3.4).
- Introduce a consolidated portal to provide all individuals with access to information on skills needs, labour market trends and the availability of study/work opportunities (Recommendation 3.10).

Strengthening the governance of skills system (Chapter 5 in the full report)

- Strengthen the remit of the National Council for Development of Social and Labour Sector by specifying a clearly defined mandate and introducing a combination of inter-ministerial working groups and technical bodies (Recommendation 4.1).
- Introduce a technical body to co-ordinate the development of the National Qualifications System (Recommendation 4.5).
- Introduce a training levy to increase the financial contribution of employers to vocational education and training, adult learning and active labour market programmes, following extensive consultations with employers (Recommendation 4.11).

References

- Asian Development Bank (2020), *Asian Development Outlook Update, September 2020 Economic Forecasts*, <https://www.adb.org/what-we-do/economic-forecasts/september-2020> (accessed on 8 October 2020). [7]
- Atlas of Economic Complexity (2020), *What did Kazakhstan export in 2018?*, <https://atlas.cid.harvard.edu/explore?country=115&product=undefined&year=2018&productClass=HS&target=Product&partner=undefined&startYear=undefined> (accessed on 8 September 2020). [16]
- Government of Kazakhstan (2019), *Road Map on the Development of the National Qualifications System for 2019-2025*, <https://old.enbek.gov.kz/en/node/363246>. [35]
- Government of Kazakhstan (2018), *State Programme of Industrial-Innovation Development 2020-2025*, <https://www.zakon.kz/5002426-utverzhdjena-gosudarstvennaya-programma.html>. [36]
- Government of Kazakhstan (2017), *State Programme “Digital Kazakhstan”*, <https://digitalkz.kz/en/about-the-program/>. [34]
- Government of Kazakhstan (2017), *Strategic Plan 2025*, <https://primeminister.kz/ru/documents/gosprograms/stratplan-2025>. [32]
- ILO (2017), *Addressing the Impact of Climate Change on Labour*, International Labour Office, Geneva, https://www.ilo.org/wcmsp5/groups/public/---ed_norm/---relconf/documents/meetingdocument/wcms_543701.pdf. [17]
- Marteau, J. (2020), “Post-COVID education in Kazakhstan: Heavy losses and deepening inequality”, *World Bank Blogs: Eurasian Perspectives*, <https://blogs.worldbank.org/europeandcentralasia/post-covid-education-kazakhstan-heavy-losses-and-deepening-inequality>. [10]
- Martinez-Fernandez, C., C. Hinojosa and G. Miranda (2010), “Greening Jobs and Skills: Labour Market Implications of Addressing Climate Change”, *OECD Local Economic and Employment Development (LEED) Working Paper Series*, OECD Publishing, Paris, <https://www.oecd.org/cfe/leed/45484420.pdf>. [18]
- Nedelkoska, L. and G. Quintini (2018), “Automation, skills use and training”, *OECD Social, Employment and Migration Working Papers*, No. 202, OECD Publishing, Paris, <https://doi.org/10.1787/2e2f4eea-en>. [22]
- OECD (2020), “COVID-19 crisis response in Central Asia”, *OECD Policy Responses to Coronavirus (COVID-19)* OECD Publishing, Paris, <https://doi.org/10.1787/5305f172-en>. [4]
- OECD (2020), *OECD Economic Outlook, Volume 2020 Issue 2*, OECD Publishing, Paris, <https://dx.doi.org/10.1787/39a88ab1-en>. [3]
- OECD (2020), *OECD Employment Outlook 2020: Worker Security and the COVID-19 Crisis*, OECD Publishing, Paris, <https://dx.doi.org/10.1787/1686c758-en>. [11]
- OECD (2019), “Country Note: Kazakhstan”, in *Skills Matter: Additional Results from the Survey of Adult Skills*, OECD Publishing, Paris, https://www.oecd.org/skills/piaac/publications/countryspecificmaterial/PIAAC_Country_Note_Kazakhstan.pdf. [27]

- OECD (2019), "Kazakhstan", in *Economic Policy Reforms 2019: Going for Growth*, OECD Publishing, Paris, <https://www.oecd.org/countries/kazakhstan/kazakhstan-economic-policy-reforms-2019.pdf>. [1]
- OECD (2019), *OECD Skills Outlook 2019 : Thriving in a Digital World*, OECD Publishing, Paris, <https://dx.doi.org/10.1787/df80bc12-en>. [20]
- OECD (2019), *OECD Skills Strategy 2019: Skills to Shape a Better Future*, OECD Publishing, Paris, <https://dx.doi.org/10.1787/9789264313835-en>. [13]
- OECD (2019), "PISA 2018 Country Note: Kazakhstan", in *PISA 2018 Results (Volume I): What Students Know and Can Do*, OECD Publishing, Paris, http://www.oecd.org/pisa/publications/PISA2018_CN_KAZ.pdf. [25]
- OECD (2019), *PISA 2018 Results (Volume I): What Students Know and Can Do*, PISA, OECD Publishing, Paris, <https://dx.doi.org/10.1787/5f07c754-en>. [26]
- OECD (2019), *Skills Matter: Additional Results from the Survey of Adult Skills*, OECD Skills Studies, OECD Publishing, Paris, <https://dx.doi.org/10.1787/1f029d8f-en>. [21]
- OECD (2018), "Trade in goods and services", *OECD Data*, <https://data.oecd.org/trade/trade-in-goods-and-services.htm>. [15]
- OECD (2017), *Building Inclusive Labour Markets in Kazakhstan: A Focus on Youth, Older Workers and People with Disabilities*, OECD Publishing, Paris, <https://dx.doi.org/10.1787/9789264273023-en>. [28]
- OECD (2016), *Multi-dimensional Review of Kazakhstan: Volume 1. Initial Assessment*, OECD Development Pathways, OECD Publishing, Paris, <https://dx.doi.org/10.1787/9789264246768-en>. [23]
- President of the Republic of Kazakhstan (2020), *Message from the Head of State Kasym-Jomart Tokayev to the people of Kazakhstan. September 1, 2020*, http://www.akorda.kz/ru/addresses/addresses_of_president/poslanie-glavy-gosudarstva-kasym-zhomarta-tokaeva-narodu-kazahstana-1-sentyabrya-2020-g (accessed on 8 October 2020). [5]
- Press Service of the Prime Minister of Kazakhstan (2019), *State Programme of Education Development until 2025: Updating curricula, supporting science and electronic UNT*, <http://government.kz/en/news/gosprogramma-razvitiya-obrazovaniya-do-2025-goda-obnovlenie-uchebnyh-programm-podderzhka-nauki-i-elektronnoe-ent> (accessed on 9 September 2020). [33]
- Strategy 2050 (2020), *Kazakhstan 2050*, <https://strategy2050.kz/en/> (accessed on 8 September 2020). [31]
- UNESCO (2020), *Ensuring Lifelong Learning for All in Kazakhstan, Kyrgyzstan, Tajikistan and Uzbekistan: Country Evidence and Policy Recommendations*, UNESCO Almaty Office, <https://unesdoc.unesco.org/ark:/48223/pf0000372898?posInSet=1&queryId=69cc8c8e-9c3a-470d-8995-3fd1f3b0cd60&fbclid=IwAR1Yc2tONlcJA6OLnV64DelkQM6LHDqrPPnHwiZE6otBbjeH6n1PIjNE6U8>. [29]

- Workforce Development Center (2020), *Labour Market of the Republic of Kazakhstan in the Background of the COVID-19 Pandemic*, <https://iac.enbek.kz/ru/node/930>. [12]
- World Bank (2020), *COVID-19 and Human Capital: Europe and Central Asia Economic Update*, <https://openknowledge.worldbank.org/bitstream/handle/10986/34518/9781464816437.pdf>. [8]
- World Bank (2020), *Education Statistics - All Indicators*, <https://databank.worldbank.org/source/education-statistics-%5e-all-indicators> (accessed on 13 October 2020). [30]
- World Bank (2020), *Fertility rate, total (births per woman) - Kazakhstan*, <https://data.worldbank.org/indicator/SP.DYN.TFRT.IN?locations=KZ> (accessed on 8 September 2020). [24]
- World Bank (2020), *GDP growth (annual %) - Kazakhstan*, <https://data.worldbank.org/indicator/NY.GDP.MKTP.KD.ZG?locations=KZ-OE> (accessed on 9 September 2020). [6]
- World Bank (2020), *Kazakhstan: Estimate of COVID-19 Impact on Learning Loss*, <http://pubdocs.worldbank.org/en/307511594086679993/Kazakhstan-COVID-19-Impact-on-Learning-Loss.pdf>. [9]
- World Bank (2020), *World Bank Database - All Indicators*, <https://data.worldbank.org/indicator> (accessed on 13 October 2020). [2]
- World Bank (2018), *A New Growth Model for Building a Secure Middle Class*, <https://elibrary.worldbank.org/doi/abs/10.1596/29792>. [19]
- World Bank (2018), "Kazakhstan trade statistics", *World Integrated Trade Solution*, <https://wits.worldbank.org/CountryProfile/en/KAZ>. [14]

OECD Skills Strategy Kazakhstan

ASSESSMENT AND RECOMMENDATIONS

Skills are the key to shaping a better future and central to the capacity of countries and people to thrive in an increasingly interconnected and rapidly changing world. Megatrends such as globalisation, technological advances and demographic change are reshaping work and society, generating a growing demand for higher levels of skills and new sets of skills.

OECD Skills Strategy projects provide a strategic and comprehensive approach to assess countries' skills challenges and opportunities and help them build more effective skills systems. The OECD works collaboratively with countries to develop policy responses that are tailored to each country's specific skills needs. The foundation of this approach is the OECD Skills Strategy Framework, which allows for an exploration of what countries can do better to: 1) develop relevant skills over the life course; 2) use skills effectively in work and in society; and 3) strengthen the governance of the skills system.

This report, OECD Skills Strategy Kazakhstan: Assessment and Recommendations, identifies opportunities and makes recommendations to improve the activation of skills of vulnerable populations, foster greater participation in adult learning of all forms, build an effective skills information system, and strengthen the governance of skills policies in Kazakhstan.