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**Implementing lifelong learning strategies in Europe:
progress report on the follow-up to the Council resolution of
2002 on lifelong learning**

EU and EEA/EFTA countries

Drawn up by the European Commission with the assistance of the European
Foundation for the Development of Vocational Training (Cedefop)

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Implementing lifelong learning strategies in Europe: progress report on the follow-up to the Council resolution of 2002 on lifelong learning

A. Introduction

1. Since the European Year of Lifelong Learning (1996), when the Council first adopted conclusions on the subject¹, the idea of lifelong learning (LLL) has grown considerably in importance both at Community and at national level. It is a key element of the new economic and social strategy adopted in March 2000 by the European Council for the decade to 2010. It is also the guiding principle of the resulting programme of work on the concrete objectives of education and training systems² [(“Education and Training 2010”)] which now constitutes the single comprehensive framework for Community cooperation in this field. Other international developments, notably the adoption of lifelong learning as the guiding theme of the work of the OECD on education since 1996, have also contributed to promoting the idea. There is now growing evidence that awareness of the importance of LLL is penetrating public opinion, as evidenced by the Eurobarometer survey of January/February 2003³.
2. In November 2001 the Commission presented a Communication *Making a European area of lifelong learning a reality*⁴, which led to the adoption of a Council resolution on lifelong learning on 27 June 2002⁵. In March 2003 the Commission sent a questionnaire (see annex) to EU Member States, EEA/EFTA and acceding and candidate countries on the follow-up to this Resolution and to its Communication. The purpose of the questionnaire was to facilitate the preparation of a progress report on this issue by taking stock of initiatives in participating countries for the further development of coherent and comprehensive LLL strategies. The conclusions set out in this report are an integral part of the interim report on the follow-up of the Work Programme on the Concrete Objectives of Education and Training Systems, which is to be presented in time for the Spring 2004 European Council.
3. This document, drawn up with the assistance of the European Centre for the Development of Vocational Training (Cedefop), gives an overview of the replies of the EU and EEA/EFTA countries. The results of the analysis of the replies from the acceding and candidate countries are set out in a separate document⁶ drawn up at the Commission’s request by the European Training Foundation (ETF). The analysis of replies also took account of the national employment action plans (NAPs), the guidelines for which include the development of comprehensive and coherent strategies for lifelong learning. The conclusions drawn from the NAPs are set out in the Joint Employment Report 2002⁷.

¹ Council conclusions of 20 December 1996 on a strategy for lifelong learning, OJ C7/1997

² OJ C142/2002

³ Lifelong learning: citizens’ views (European Commission/Cedefop). Office for official Publications of the European Communities, 2003

⁴ COM(2002) 678 final (November 2001)

⁵ OJ C163/2002

⁶ *Reference/URL*

⁷ COM (2002) 621 final , Supporting document SEC (2002) 1204

4. While following the structure of the questionnaire (which itself was based on the six building blocks identified in the Commission Communication), this document attempts to give an overview of the current position in the countries surveyed. Rather than exhaustively cataloguing all the measures and initiatives identified, it highlights what appear to be the salient points and trends which emerge from the collective analysis of replies.
5. Moreover, the amount of detail in replies varied considerably, from fewer than 15 to over 150 pages, making it difficult to assess the situation in all countries on a comparable basis. The broad conclusions are thus necessarily tentative. Notwithstanding the differences in national situations in regard to issues like the degree of development of adult education systems, integration of education and vocational training or the degree of centralisation or decentralisation of systems, it was considered worth while to set them in a European context. Exchange of good practice could be promoted by drawing attention to some practices or innovations which could be seen as exemplary or worthy of consideration by other countries. Approaches which have been tried in one country may not be applicable without some adjustment to the circumstances of another, but they can yield lessons which are relevant when the necessary adjustments are made.
6. It is appropriate to mention briefly here some developments at European level. In March 2003 the Commission set up *PLOTEUS*, an internet Portal on Learning Opportunities Throughout Europe. This was part of its response to the request from the European Council (Lisbon 2000 and Stockholm 2001) that it and the Member States should set up a Europe-wide service providing information on jobs and learning opportunities. In April 2003 it launched the *R3L* initiative linking 120 learning regions with a view to exchanging know-how and developing methods of promoting LLL at regional level. In March 2002, the social partners (UNICE/UEAPME, CEEP and ETUC) adopted a common framework of actions for the lifelong development of competencies and qualifications, as a contribution to the implementation of the Lisbon strategy. In March 2003, the social partners produced a first annual progress report setting out the first steps taken in relation to the implementation of the framework of actions.

B. General Conclusions and Trends

LLL a guiding principle growing in importance

1. From an examination of the replies, it is evident that evolution towards a comprehensive lifelong learning (LLL) strategy is a gradual process and that, in the time elapsed since the Resolution and the evaluation of NAPs for 2002, countries' contributions could not be assessed solely in terms of progress since then. This is all the more so because countries' replies do not always clearly distinguish between measures taken in the last year or two and others which have been in existence for some time previously. The present document is therefore a snapshot of work in progress, rather than an attempt at a precise measurement of what has changed since the Council Resolution. It confirms the conclusion resulting from the examination of NAPs that countries are making progress, even if at different speeds and from different starting positions. Strategies vary in their coherence and their comprehensiveness, and **there is still some way to go before one could speak of all countries having a well-developed LLL culture with wide public acceptance and participation.** Given the variety of initiatives and the fact that some countries appear to be well-advanced, exchanges of good practice especially regarding the definition and implementation of coherent and comprehensive strategies would be a useful instrument to integrate into further work
2. The education and training policies of Member States, in general terms, increasingly reflect a concern for lifelong learning and interpret LLL in a broad context covering all

types of learning, in all types of places, with all types of instruments and all types of pedagogical approaches. They see LLL as being addressed to the whole population, while generally placing a particular emphasis on the special needs of specific target groups. However, while the principle of lifelong and lifewide learning is accepted in all Member States, there is considerable variation in the extent to which it is integrated in practice into some or all components of the learning system. A particular coordination effort is required where responsibility for different components of the LLL chain is divided between ministries or levels of government.

3. Much legislation in the Member States takes account of LLL considerations and priorities, but **there appears to be little or no legislation specifically on LLL as such. Policy documents and strategies on LLL are more frequent.** The overall impression emerging from countries' replies is that, for many, the LLL idea is increasingly penetrating policy formulation and implementation. It is being taken into account as a principle underlying various separate education and training policy reforms, even if it could not yet be described as the basis of a comprehensive new national strategy in all countries.

- highlighted themes

4. Themes which are given a good deal of attention in the reports are:
 - a) LLL as an issue concerning the population as a whole, though the main focus is on initial education and the working population;
 - b) the importance attached to basic competencies, whether acquired during initial education or through second-chance opportunities;
 - c) the role – including shared financial responsibility – of multiple stakeholders (national, regional and local public bodies, social partners, civil society), in promoting a LLL culture centred on the individual: financing is discussed mainly in terms not of investment targets but rather of shared responsibility;
 - d) the removal of obstacles and the development of multiple pathways to further learning, often linked to two issues: formal recognition of competencies however acquired, and guidance and information systems to help the individual negotiate these pathways;
 - e) the development of educational and training staff, to enable them to fulfil a changed and wider variety of roles than at present and use new pedagogical instruments effectively;

- underdeveloped themes

5. The following themes receive rather less attention than might have been expected:
 - a) early childhood learning – including the family environment and parents' education – to which only a small number of countries refer;
 - b) the importance of basic schooling in developing a LLL ethos, though some countries refer to the need to adapt teacher training accordingly;
 - c) the potential for the workplace to be an inherently learning-oriented environment, rather than a place where theoretical knowledge is applied in practice;
 - d) targets for investment in LLL expressed in budgetary terms;
 - e) the role of collective bargaining and public-private partnerships in increasing participation in LLL;
 - f) learning, including language learning, as the key to life in the wider European environment.

- typology of LLL concepts

6. Attempting to identify a broad categorisation of LLL cultures and structures in Member States is a hazardous exercise, and to classify individual countries accordingly is even more so. However, at the risk of oversimplification, and recognising that there is some overlap, one can put forward a few models in relation to which countries may try to identify their present position:
 - a) a **well-developed cradle-to-grave culture** of LLL, with wide public acceptance and high participation rates, covering not only work-related training but also personal development and active citizenship, served by developed public and/or civil-society or informal systems, with a learning-promoting organisation of work complemented by private participation in recreational learning;
 - b) a **largely employability-related approach**, building on a solid initial training and focusing mainly on continuing training to adapt to changing production processes and structures, with a strong participation by both the public sector and industry; workplace training complemented by recognised legal or collectively-negotiated rights to education and training leave; personal further development regarded largely as a private affair;
 - c) a **more recent espousal of lifelong learning** which is tied into a modernisation of society and the economy and seeks to change traditional assumptions about the division of life into distinct phases of learning, working and retirement; largely driven by public initiatives but supported by the social partners;
 - d) a **social-inclusion approach** which mainly targets those whose initial experience of education and training has been unsatisfactory or inadequate, certainly in relation to the modern world, and which seeks to re-engage them with a learning experience which may, especially at the initial stages, focus on personal development and bringing them up to a level of personal and basic skills which they should ideally have reached on completion of their initial education; public bodies to the fore, civil-society adult education organisations also involved.

Basic competencies

7. **There is surprisingly little reference to the development of a lifelong learning ethos through basic schooling.** Many reports highlight how LLL entails necessary changes in teacher training, with the emphasis shifting to seeing the teacher as a coach for independent learning whose first task is to create an awareness of the need for a lifelong commitment to learning. However, while this is an important development, its impact will inevitably be long-term.
8. Literacy and numeracy programmes are mentioned in many replies, and a prominent place is accorded to accompanying support measures to help people recognise their educational deficits and be motivated to follow courses. Given the general raising of educational standards and achievements in most Member States, **many measures are concerned with adults with no, or only low-level, qualifications** who risk being left behind. These measures involve accessing formal initial education programmes or specific vocational or general adult education in various formal and informal settings.

Learning and the workplace; the role of the social partners

9. There are many references to the role of the **social partners**, particularly in committees and partnerships relating to initial and continuing vocational education and training. There is, however, **relatively little reference to their role in stimulating participation and innovation in LLL**, in spite of the European-level common framework referred to in paragraph A.6 above. Thus, while initiatives by public bodies are well-reported, there is little or no information on LLL initiatives originating from within the workplace. Familiar concepts such as the learning organisation or *l'organisation qualifiante du travail* are noteworthy for their absence. However, The combination of education and training with work in various models of alternance is an important factor in developing the LLL reflex. Replies from several countries suggest that education and training systems are increasingly evolving towards such a dual approach, placing a growing emphasis on work-related practice and employability.
10. Some measures explicitly link workplace learning to demographic trends, including the ageing of the workforce in individual firms and the desirability of transferring knowledge to younger workers and facilitating retraining of older workers, sometimes as a means of avoiding early retirement.

Financing lifelong learning; public-private partnerships

11. Generally, **there is an emphasis on getting quality for the money already being spent rather than on new funding**. Recognition of the responsibility of the state for funding initial (including second-chance) education and training seems general, but the messages on how continuing education and training should be financed are less clear. Overall, the reports indicate acceptance of access free of charge to basic and further education programmes for adults who have inadequate educational qualifications. For continuing training, particularly at the higher competence level, the responsibility of employers and the individual is highlighted. There are differences in relation to the financing of higher education, although this is not a theme covered directly in many of the reports. Discussion on student fees and support systems in many countries should perhaps be placed within an LLL framework, as its outcome is clearly likely to have an impact on access to learning opportunities.
12. Although the questionnaire refers to public-private partnerships, **the reports do not suggest that there has recently been either a substantial increase in, or a major role for, private-sector investment in education and training institutions**. On the other hand, there is acceptance that learning must be paid for by public authorities, employers and the individual. Tax relief on educational expenditure for both companies and individuals is the mechanism most commonly mentioned.
13. Given that the benefits from lifelong learning accrue to the individual, to employers and to society at large, the question of who should pay for what is an important but complex issue raised by many Member States. Multipartite inputs from government, employers, trade unions and civil-society organisations to policy formulation are accepted as essential, and **replies demonstrate recognition of the importance of a sense of shared ownership by the social partners**, for example in designing and implementing dual-system approaches. In some instances this shared ownership entails the emergence of regional and/or sectoral knowledge clusters, facilitating technology transfer and innovation. There is some limited evidence of shared responsibility for learning through collective bargaining agreements which, at industry or local level, can help to respond better to local conditions and promote a learning-promoting environment.

Facilitating access

14. Individual rights including second-chance opportunities are referred to in many replies. **All countries speak of removing barriers to learning and improving access for various at-risk groups**, particularly for those affected by social or geographic disadvantage (immigrants or ethnic groups, urban or rural environments) and for those who have not completed basic education. Of the more specific target groups, the one which is most mentioned and very often in an urgent context, is that of migrants, ethnic minorities, refugees and asylum seekers. Only one country refers to validating the competencies of members of these groups who have qualifications from their country of origin as a way of integrating them into the host society and economy. Many responses indicate that schools and other educational institutions should be much more open to their local communities and to each other.
15. In regard to gender inequality the emphasis is as much on what has been achieved, e.g. increased female participation rates in higher education and vocational training, as on what remains to be done. **Overcoming sex-stereotyping of ICT, scientific and technical careers seems to be the main outstanding issue identified**. None of the reports comments on the problem of underperformance by males in school, although this is often the first step towards self-exclusion from gainful employment and further learning.
16. Many countries refer to the economy's need for developing ICT skills in schools and the wider population, but it is difficult to discern clear trends in terms of targets and priorities. The fact that they are at different stages of progress in this area, for example as regards the numbers of individuals, schools and other organisations having access to PCs and the Internet, reinforces the differences of emphasis which they place on aspects of ICT. Nevertheless, a theme common to many countries' replies is the key role of teachers and trainers and how to improve ICT-based pedagogy.

Information and guidance

17. Information, guidance and counselling, (including outreach measures for those least likely to participate spontaneously in LLL) are identified by quite a few countries as essential to ensure that rights and opportunities are availed of, especially in a system which places the individual at the centre of the learning process. Many of the reports deal with new guidance initiatives, geared to specific target groups. Whereas guidance was previously seen as being essentially to help young people make the transition from education to working life, there is now some evidence of an increased awareness of the fact that it must be permanently available, lifelong and lifewide. However, **there seems to be some way to go before one can speak of a coherent lifelong guidance system being widely available** throughout the Union for those at work as well as those in education.
18. Education and training fairs and other measures to raise awareness and provide information on courses available are widespread, though they mainly target school leavers. On a positive note, adult learners' weeks and similar promotional activities seem to be growing more widespread. In some cases, such activities include bringing the message of LLL and "taster classes" to people outside the traditional learning environment (pubs, clubs, museums etc.) in order to reach those who might not regard themselves as concerned by it.

Qualifications and validation of acquired competencies

19. **Quite a few countries have begun to establish systems for validation of non-formal and informal learning** in the context of removing barriers to further learning. Key components to providing incentives to LLL include flexible qualification structures which not only integrate the different streams and levels of general education and learning, but

also those of vocational and technical education and training. Different approaches exist, but common factors critical to promoting LLL include the opportunity for systematic identification of competencies however acquired, their validation in terms of transferability to other situations and the creation of opportunities for certification or for admission to further learning leading to new qualifications.

Creating a cradle-to-grave learning culture – some missing links

20. Early childhood care has often been associated more with releasing mothers back into the workforce than with the child's development. **In only a small number of replies to the questionnaire, however, is a strong emphasis on pre-school care and early childhood development explicitly linked to the creation of a learning culture.** The importance of parents and learning in the family environment receives only passing mention, as does the question of parents' education.
21. **Young people in general are not automatically identified as a specific target group** for specific LLL policy measures, apart from tackling issues like early school leaving or literacy. Equally surprisingly, very few activities specifically geared to older age groups and particularly those over 65 are mentioned. The idea of learning as a significant component of an active ageing strategy, though well-established in some societies and known to yield benefits in terms of both well-being and care costs, receives very little attention in the replies.

European dimension

22. Despite the absence of a specific reference to the European dimension in the questionnaire, several respondents refer to the need for a European context in relation to frameworks for formal, informal and non-formal qualifications, while the value of European programmes in developing co-operation with neighbouring countries is also mentioned. Many countries do refer, in their answers to specific questions, to international best practice and standards, the organisation of meetings involving other (particularly neighbouring) countries, etc. Possibly because of the links to the Lisbon agenda and concurrent work under the work programme on objectives, responding countries seem willing to take some steps in the direction of benchmarking and setting clear targets, more often in terms of participation or attainment rates rather than investment levels.
23. While the Council Resolution on LLL did not give rise to specific EU financial support, the mainstreaming of a LLL philosophy has meant that existing Community financial instruments have contributed to the implementation of elements of strategies based on it. The impact of the European structural funds, and in particular the European Social Fund (ESF), in terms of content, not just of financing, is evident from and explicitly mentioned in quite a few countries' responses. For some countries, the background provided by the European Employment Strategy and the conceptual framework which the Community Support Framework provides for structural fund intervention are of major importance. Social inclusion and active labour market measures developed by many countries with ESF support, particularly to deal with long-term unemployment, have a clear LLL dimension, and some "learning regions" have also received substantial structural fund support. The influence of the ESF in supporting the development of LLL is thus widespread, and is not confined to the "cohesion countries" which are major beneficiaries under Objective 1.
24. There was no question on language learning, but it is a feature of several reports. It arises primarily in relation to migrants learning the language of their new country of residence, but the objective of promoting the learning of foreign languages among the general population is also mentioned by some countries.

C. Detailed analysis of national contributions

I. General Framework

Legislative framework (Q1)⁸

1. The overall impression emerging from countries' replies is that, for many, even if LLL could not yet be described as the basis of a comprehensive national strategy, the idea is gradually penetrating policy formulation and implementation, and being taken into account as a principle underlying various separate education and training policy reforms,.
2. Much legislation in the Member States takes account of LLL considerations and priorities, but there appears to be little or no legislation specifically on LLL as such. Policy documents and strategies on LLL are more frequent. For example, **Finland's** strategy for LLL is enshrined in its Development Plan for Education and Research 1999-2004 which sets aims for lifelong learning policy. It stresses that lifelong learning must be understood as an approach which steers education policy and other policy sectors involved in learning in order to offer opportunities for people to develop skills for continuous learning and to learn throughout their lives. **Sweden** refers to a structure for lifelong learning and a national strategy, which should support organised as well as non-organised learning situations. It also sees LLL as a powerful tool for achieving equality and countering exclusion and indicates that different policy areas must take joint responsibility together with the social partners to put LLL into practice. Legislation agreed in 2001 covering a wide range of adult learning opportunities placed these side by side with higher education and within a LLL framework. The report of the working group established by the *Bund-Länder-Kommission* in **Germany** is expected to be followed very soon by a common *Bund-Länder* strategy paper. In the **UK**, the **Scottish** Executive launched a national debate on education in March 2002 and published its strategy for lifelong learning in February 2003 under the title "Life through Learning; Learning though Life". **Greece** refers to an overall LLL strategy and indicates that the government's efforts are focused on the principle of an uninterrupted learning continuum. **Norway** presents, in diagrammatic form, an LLL model, which places the individual at the centre while emphasising partnership, inclusiveness and quality. In some countries such as **Ireland** and **Portugal**, LLL underpins wider national economic and social development plans to which government and the social partners subscribe.
3. Although the **Norwegian** *Competence Reform* white paper dates from 1998, it has a very broad approach embracing all adults, in and outside the labour market. Its tripartite nature is reflected in the fact that competence development is an element in the annual wage negotiations and in collective bargaining. **Austria** identifies LLL as a concept embracing all aspects of not only the education and training systems but also of other domains like agriculture, family policy etc. **England** mentions a *Skills Strategy* white paper to be published in late June 2003, setting out the role and responsibilities of employers, individuals and government and showing how different programmes and policies could contribute to raising the level of skills throughout the population. **Greece** underlines the importance for a successful LLL strategy of researching the skill needs on the labour market and refers to a new National Employment/Lifelong learning Observatory in the National Labour Institute.

⁸ For ease of reading, the essential theme of each question is summarised as here, and relevant information is organised accordingly, including that drawn from some countries' replies to other questions.

- non-governmental actors

4. In many countries, civil-society organisations, churches and social partner organisations play an important role, either directly as LLL providers or as stakeholders consulted in the running of public systems.

- decentralised structures serving the individual

5. Successful implementation of an LLL approach requires not only agreement on a concept and a broad strategy for action, but also structures which allow for implementation at regional, local, institutional (school/company) level and which, as several reports point out (**DK, F, S, N**), make the individual the centre and driving force of the whole learning process. Where constitutional arrangements assign primary or sole competence to sub-national entities – sometimes asymmetrically as between education and vocational training – there is admittedly a risk of losing the coherence of an overall LLL strategy. However, in some countries (**B(FL), D, A, FI**) steps have been taken to resolve this dilemma, for example through various types of coordination committees. Decentralisation, and not just from national to regional level, is thus of key importance, though given a general tendency towards devolution or regionalisation, it is difficult to establish which measures are taken on a specifically LLL-centred logic. Nevertheless, while countries like Denmark, France, Italy and the UK report on decentralisation to regions (a trend which can be seen as a contribution to the objective of improving insight into learning demand and bringing learning closer to home), they and others (**D, FI**) also show a tendency to increase the powers of individual education and training institutions and to strengthen the role of regional stakeholders in regional consultation structures (**F**). The strengthening of the individual institution's role seems to be particularly strong in the **UK**, where the last few years have seen major changes in terms of devolution of powers, not just in education, towards the regions.

- individual rights and responsibilities

6. Individual rights of adults to learning (some provided by quite old legislation) are emphasised as a key element by many countries (**S, DK, F, N**). **Italy** has undertaken a number of significant reforms of its education and training systems, not least as recently as the 2003 reform of the national school system, which institutes a “right to education and training for at least 12 years or, in any event, until completion of a qualification before the age of 18”. In **Norway**, not only do employees have a legal right to leave of absence, but under the Competence reform adults have a legal right to primary, lower secondary and upper secondary education and to the assessment of non-formal and informal learning. In **France**, all workers and job-seekers have the right to a review of acquired competencies as a tool to support their professional/vocational progress. As well, since January 2002, each individual in France has the right to have his/her prior non formal or informal learning validated. While the emphasis of these French measures is on identification of acquired competencies rather than new learning as such, they highlight the lifewide dimension of LLL and show how learning can be integrated into life outside formal learning structures. Other countries (**UK**) place more emphasis on broader access and wider provision (see sections III and IV below).
7. The provision of individual rights is a step in the right direction, particularly facilitating second-chance access for those who have not followed standard education and training pathways or extending the horizons of those for whom the traditional pathway involved a limited and non-recurring participation in education and training. There is nevertheless a risk that such rights will remain aspirational unless accompanied by adequate financial and other supports provided by different actors. These include information and publicity campaigns to raise awareness, adequate leave arrangements at company level and supporting infrastructure such as crèches to ensure that such rights are indeed taken up.

8. The **Netherlands** refers to a blurring of the traditional sharing of responsibility, which was based on government being responsible for initial education and training, and the private sector for people in employment. It notes private industry's involvement in the initial dual system, government taking some responsibility for workers with no basic qualifications, a growing emphasis on individuals being made more responsible with the state and employers as facilitators, and many collective labour agreements containing provisions on training.
9. The growth of a market in education and training services, which has long existed but is likely to develop further with the emphasis on the individual and self-directed learning, is noted in different ways (see also replies to Question 13 below). **Germany** has enacted legislation on regulation of the education and training market with a view to increasing competition between providers, improving both the range and quality of what is on offer and encouraging individual, while **France** has adopted new rules on training services contracted out to private suppliers.

Coordination between Ministries (Q2)

10. Traditional separations in ministerial responsibility between education and vocational training – especially continuing vocational training – are a widespread factor which calls for a considerable effort of coordination if a true LLL strategy is to emerge. In some instances (**D, B**) these separations are linked to the constitutional system, and in any event they are often deeply seated in political and administrative custom. They need not constitute an insuperable problem, and several countries have established mechanisms to overcome their drawbacks.
11. The responses of several countries suggest that interministerial coordination developed in response to EU initiatives (notably the Community Support Frameworks and Operational Programmes for structural fund operations) has led to a strengthening of coordination based on its own merits. The **Netherlands'** National Action Programme for LLL (1998) was a direct response to the European Year of Lifelong Learning, and this has been followed by a LLL policy agenda involving the Education, Social and Economic Affairs ministries. An interministerial "LLL platform" is being set up, and the need to involve ministries such as Justice, Health and Welfare has been recognised. The fact that LLL was viewed as a "controversial issue" outside the remit of the caretaker government suggests that the concept has truly taken root in domestic politics.
12. European Structural Fund regulations have for more than a decade emphasised coordination and evaluation. In some countries – not just the "cohesion countries" which are major beneficiaries like **Spain** and **Greece**, but also others such as **Germany** and **France** – the growth of some coordination structures is explicitly linked to Structural Fund operations. Among the latter countries, coordination in relation to LLL is more evident at regional or programme level than at national level. In **Greece**, in the context of the 3rd Structural Fund Community Support Framework, the implementation of the two operational programmes (for employment and vocational training by the Ministry of Labour and social security and for education and initial vocational training by the Ministry of Education and Religious Affairs) would seem to demand a degree of concerted action by these Ministries and other statutory and non-statutory bodies. In addition a new bill on a national system for the linking of VET and Employment is now the subject of consultation with the social partners.

II. Building up partnerships

Local-level partnerships (Q3)

13. Decentralisation and building up partnerships at local or regional level often go hand in hand and are likely to reinforce each other in terms of defining and responding to local

and regional needs. In Germany the “Learning region – support for networks” programme is at the heart of the Federal Education and Research Ministry’s programme for LLL for all. This (2001 to 2006) programme has now nation-wide some 70 projects and aims at improving, from the bottom up, the offer of learning opportunities, particularly for disadvantaged groups. Some 40% of the €13 million comes from the ESF. Italy is also promoting local partnerships through the creation of regional / local committees whose role is to integrate all learning opportunities at a territorial level.

14. In **France**, an interesting concept is the development of *regional technology platforms* linking schools, university research institutions, local partners and firms in given industrial sectors. These structures (of which there are currently fifty in existence) are an important factor in regional development. A more explicitly LLL-based initiative is the **Austrian Education clusters**, which rely on existing education and business establishments with the backing of the Education Ministry and National Chamber of Commerce and Industry. **Austria** has also recently introduced an initiative (*Unternehmen-Bildung*) to bring education closer to the world of work, with regional stakeholders playing a key role, supported by a national office. Eighteen per cent of schools already have long-term partnerships with industry. The **Netherlands** encourages providers of all levels of vocational and professional education and training to form partnerships among themselves and with regional governments and private-sector clients in order to establish a flexible regional network of learning facilities.
15. Some countries (**UK, F, A**) emphasise the importance of opening up schools and other educational institutions in order to promote LLL. Guidance services, e.g. *Connexions* for young people aged 13-19 in **England**, are seen as a very important element in partnership-building between organisations and in reaching clients. In that country, forty-seven partnerships based on the territorial areas covered by Learning and Skills Councils bring together services for young people, while 101 non-statutory voluntary Learning Partnerships (with members ranging from voluntary bodies to further or higher education institutions) have been put in place since 1999. They have been created to promote provider collaboration in support of LLL and to maximise the contribution of learning to local regeneration. In **Scotland** a range of partnerships covering guidance and LLL providers has been created with the support of the Ministry.
16. The role of public libraries as a central point of local learning networks is referred to in a number of reports, but particularly in **Denmark**. Public libraries would appear to be seen as accessible places, and not just in a physical sense, by broad groups of the population, including those who might otherwise be excluded, e.g. migrants. The **Netherlands** also regards schools as a community resource and promotes linkages to libraries to strengthen the role of both in LLL. **Finland** appears to have relatively advanced systems of local and regional partnerships. **Luxembourg** mentions the creation of a network of internet resource centres (*Internetstuff*) for adult education, with one in each local authority area, based on successful cooperation between ministries, local authorities and private associations. **Spain** is also supporting the introduction of new technologies in libraries in association with regions and local government.

Participation of social partners (Q4)

17. The role of the social partners at EU level was the subject of a separate report by them as mentioned above (para 4). The relative lack of specific references to innovative involvement of the social partners in countries’ replies to the questionnaire may perhaps be explained by some uncertainty as to what is truly innovative as opposed to the continuation or adoption of good practice. As one would expect there are many references of a general nature to social-partner involvement in committees and partnerships, and in particular in those relating to initial and continuing VET. This is evidently quite intense in many countries (**D, DK, A, N**). In **Spain**, the social partners are represented in consultative councils not only for VET but also in those which exist for

school education at national and regional levels. In some cases, there appears to be a new effort to strengthen cooperation with the social partners, for example the reopening of social-partner negotiations in **France** in VET in 2003 aimed at adapting VET and giving all workers the scope to develop their competencies continuously. Likewise, in **Italy**, the social partners are heavily involved. In July 2002, the State and Social Partners signed “the Pact for Italy” which aims to promote human resource development. Priority objectives include ensuring that people acquire the necessary key competencies and increasing access to lifelong learning for adults. In the context of the bilateral regional bodies, social partners have responsibility for identifying skills needs of companies (to be used to inform training needs) and on a more long-term basis for better anticipating learning demand. In **Finland** the Ministries for Education and Labour both have joint committees involving the social partners. In **Belgium** there has been agreement in **Flanders** under the *LLL on the right road (LLL in goede banen)* initiative, consultations between Ministries and social partners have led to covenants for 22 sectors, and the social partners will be involved in follow-up measures. In **Wallonia** the Council for Education and Training is active in ensuring dialogue between social partners, while in June 2003 the Regional Minister agreed to further measures to enhance involvement of the social partners in LLL.

18. **Iceland** has largely left it to the unions and employers’ organisations to negotiate terms that safeguard the rights of workers/employees, though in 2003 the Government reached an agreement with the two sides of industry on the creation of an Education and Training Service Centre supported by the Government. Wage agreements contain many provisions that guarantee workers the right to lifelong learning, as well as provisions on funds for lifelong learning, and provisions guaranteeing higher salaries for those who gain qualifications. It has thus come increasingly common for wage agreements to guarantee the right of workers to undertake studies. In the **UK**, the government is promoting the idea among employers that addressing basic skills should be a normal part of workforce development activity. Through the Union Learning Fund, governments in different parts of the country continue (since 1997) to strengthen the trade unions’ capacity to influence both employers and employees to encourage greater take up of learning at work. In **Scotland**, a trade union working party on LLL, chaired by the Minister for Enterprise, Transport and LLL meets quarterly and provides a forum for trade union input to the Scottish executive
19. There are few specific references to social partner involvement in funding arrangements. Nevertheless, where training funds exist – raised through levies on salaries etc., often on a sectoral basis (**I, D, F, A**) – the social partners are clearly involved in their management. **Greece** refers specifically to a fund for employment and vocational training in this connection.

Role of education and training establishments in promoting LLL (Q5)

- combining work and learning

20. The combination of education and training with work is an important factor in developing the LLL reflex. This may take different forms, such as the dual system of the German-speaking countries, or various other forms of alternance or “sandwich” courses practised elsewhere. Replies from several countries suggest that education and training systems are increasingly evolving towards such a dual approach, placing a growing emphasis on work-related practice and employability. **France** has taken a number of measures in the last few years to facilitate the more active engagement of the traditional education system with regional stakeholders and to facilitate cooperation between teaching and/or training establishments in a sectoral or adult-education logic. These measures include the creation in 2001 of *Lycées de métiers* which create partnerships between education and training providers and economic and regional actors around specific technology branches,

facilitating the integration of theoretical and practical learning. The creation in 2002 of public-interest entities (*Groupements d'intérêt public "formation continue et insertion professionnelle"*) facilitates cooperation by public regional bodies responsible for education and training with private operators. All school-based courses leading to vocational qualifications in that country must now include a period of workplace training. A recent (1999) law in **Italy** provides for a system of post-secondary, non-university training to develop high-level technicians, with a 30% work-linked training content. **Austria's** response suggests that there is a well-established and close partnership between industry and government and the education system regarding many aspects of LLL, and that this partnership continues to evolve with each new initiative.

- schools and initial training

21. The greater involvement of schools and other education institutions (including secondary and tertiary level and adult education ones) in LLL is emphasised by all the reports. Some countries (**UK, France**) lay emphasis on measures through which educational institutions could become local learning centres with easier access to them by many different groups. In **Italy**, a scheme aimed to train high-level technicians (IFTS) is a good example of co-operation between schools and universities, and of dialogue between the various institutional players for the definition of needs, planning, design and implementation, and the **French Lycées de métiers** mentioned above share some of these characteristics.
22. The greater involvement can, however, be achieved in different ways. **Sweden** makes the point that LLL in effect presupposes that compulsory schooling achieves the goal of each individual developing his/her own unique characteristics and in this context refers to the broadening of upper secondary education, with a common core of foundation courses in eight subjects, as a means of ensuring progression and avoiding "dead-ends". **Austria** also stresses the importance of key competencies, including self-directed learning, in its curriculum reform for both general and vocational education, and speaks of making the school system both vertically and horizontally permeable, with opportunities for second-chance completion and lateral shifts into different education and training pathways. In **England**, the extended schools programme will be working with up to 240 schools to enable them to provide a core set of services and activities (childcare, health, and social care, LLL opportunities, family learning, parenting support, study support sports and arts and ICT access). **Greece** refers to the broadening of school curricula into areas like health and consumer education and the use of new teaching methods, including ICT.

- higher education

23. Higher education institutions are seen as particularly important, as is their greater involvement in their surrounding communities (**Sweden, Greece, Norway**). The role of tertiary level institutions in promoting LLL is emphasised in **Greece**, where a national level open university has been established as have lifelong learning institutes, of which the target group is the local adult population, in each university. **Finland**, with practically everybody completing comprehensive school and over 90% of children involved in post-compulsory education, has measures to encourage further studies, with universities endeavouring to facilitate recognition of prior studies and non-formal studies, and increasing the number of entry and exit points and individual study tracks.

- adult education

24. Adult education naturally receives considerable attention as a key domain for promoting LLL. **Greece** emphasises the role of adult education centres, working through local networks, in both co-ordinating and providing LLL provision at a regional and local level. Other countries (**S, N, DK**) put more emphasis on the access by adults to (primary, lower and upper cycle secondary) general education programmes. **Sweden** also emphasises the need for outreach activities in the framework of adult education and considers activities

like counselling, validation, accessibility and study support as the foundations for LLL. In **Norway**, there are now 130 local learning centres, which are funded by the state and promote co-operation between local enterprises and schools. **Denmark** draws attention to the development of centres of competence to ensure a balance of the demand for and supply of two-year part-time master programmes within the adult education system. **Italy** mentions the setting-up of territorial centres for adult learning across the country whose scope is to provide adults with evening classes leading to a qualification equivalent to that awarded at secondary school level.

III. Insight into the demand for learning

Access to basic skills for all as a foundation (Q6)

- early childhood care and development

25. Demand for care for children of pre-school age was in the past, and to a considerable extent is still, driven by the consideration that it releases parents to work or to pursue their own education. However, there are signs of growing recognition of the importance of early childhood care and development as the first, critical stage in a cradle-to-grave approach to LLL as advocated particularly by **Finland**. The **UK** and **Greece** mention measures ensuring availability of, and access to, pre-school places. Early development is seen as particularly important for children from less-privileged backgrounds to avoid permanent social handicap. The **Netherlands** refers explicitly to pre-school and early childhood care and education as the first step in developing a LLL culture. Its goal is to ensure that by the time they enter third year primary, all pupils should have to cope with as little disadvantage as possible. **Denmark** and **Sweden** also highlight improving programmes so that very young children can begin the learning process in a positive and structured way appropriate to their stage of development. In **Denmark**, 90% of municipalities can give a guarantee of day-care availability and the same percentage of 3-5 year olds are in publicly supervised day-care centres.

- basic skills; literacy

26. As might be expected, basic skills receive considerable attention in most countries' reports as the critically important foundation for further learning. **France** emphasises combating illiteracy and school dropout, school being the primary place to develop basic skills. In order to tackle these problems, it set up a national agency in 2001 to fight against illiteracy. This action is based on interministerial and interinstitutional cooperation. **Ireland** also has a range of measures to tackle adult illiteracy, including use of daytime public-service TV which has been particularly successful in overcoming initial inhibitions on the part of the people concerned. **Austria** and the **Netherlands** both stress acquisition of basic education qualifications, if necessary through second-chance opportunities, as the platform for further progress. For the latter, "basic qualification" is taken to be completed secondary VET level 2 or upper secondary general education, and anyone short of this is regarded as early leaver, and a target for remedial measures of various kinds. **Greece** refers to a programme of second-chance schools geared to those over 18 and faced with exclusion for reasons of functional illiteracy or lack of qualifications. In the **UK**, the **Northern Ireland Essential skills for Living Strategy** programme launched in 2002 adopted a radical new approach (with some specific targets) to literacy and numeracy issues, included the introduction of a regional curriculum, accreditation for adult learners and for improved tutor qualification. **Germany**, on the other hand sees the extension and greater flexibility of the dual system through, for example, vocational preparation measures to assist entry to it, to be a key instrument in preventing exclusion. Tax concessions or grants are available in several countries (**NL**,

F) for firms which train formerly unemployed people to a given qualification level. **France** refers to a law adopted in 2002 which concerns young people without qualifications. This law provides financial support for their training at the workplace. **Spain** is unusual in identifying the development of entrepreneurship as an objective of the education and training system in its legislation.

27. Given the general raising of educational standards and achievements in most Member States during recent years, it is not surprising that they all refer to adults with no, or only low-level, qualifications. The concerns here range from functional illiteracy (**GR, I**) through those who only completed primary or lower secondary education, to those who have become unemployed because the main skill they learnt is no longer needed. That many of these people cannot be helped through traditional formal education structures is widely recognised. Hence the importance of new types of education and training in in- or non-formal settings, and also of the recognition of skills and learning obtained on the job or in other informal situations (**F**). In **England**, the government's strategy for improving adult literacy, language and numeracy skills (*Skills for Life*) was launched in March 2001, with the aim of touching 1.5 million adults by 2007. Literacy and numeracy provision is entirely free to the learner. 170 000 adults have already used a hotline providing information about courses. A *Skills for Families* pilot project delivers literacy, language and numeracy skills to families in schools, workplaces and voluntary organisations. **Scotland** is developing community-based learning partnerships for adult literacy and numeracy.

- specific groups

28. Of the more specific target groups, the one which is most mentioned and very often in an urgent context, is that of migrants, ethnic minorities, refugees and asylum seekers. The reports give the impression that even where the numbers concerned are not enormous, this is seen as an urgent, and in some countries a new issue, needing immediate responses. In virtually all countries, examples of measures are given – many of these relate to the learning of the local/national language as a second language. Whereas the advantages (particularly motivational) of doing this in the workplace are clear, there is also an emphasis on the need for mastering the host-country language in order to function as an active citizen and not just as a member of the workforce (**NL**). There is therefore a need to achieve a balance in this regard in language learning provision. Measures taken often have an intercultural dimension and include those to assist the entry of migrants into mainstream measures, e.g. in **Germany** into the dual system.
29. A number of countries refer to the issue of including prisoners within LLL strategies. These sometimes include specific references to language provision for immigrants/ethnic minorities (**England**).
30. In spite of this being the international year for people with disabilities, relatively few reports make specific references to initiatives for the physically and mentally handicapped. **Denmark** is one of the exceptions. **France** supports access to learning for handicapped people through ODL.
31. Geographic access for people in remote areas to education, including higher education, is still seen as an issue needing attention and in **Sweden** a Net University has been established linking up the programmes already on offer in existing institutions. Possibly going against a trend of rationalisation elsewhere, **Austria** stresses the maintenance of schools in rural areas as a cultural resource for the community.

ICT skills (Q7)

- targets and priorities reflecting diverse national situations

32. Many reports refer to the economy's need for developing ICT skills in schools and the need to do so for the entire population, but it is difficult to discern clear trends in terms of targets and priorities. The fact that they are at different stages of progress in this area, for example in terms of individuals, schools and other organisations having access to PCs and the Internet, increases the differences of emphasis which they place on aspects of ICT. For most countries, it is not just the question of access or of improving that access through a broadband network which is now centre stage. Different targets are set for different components of the population or education and training system. For example, **Northern Ireland** refers to a target in further education of 1 PC for every 5 FTE students and 3 FTE staff; **Denmark** that 70% of families with children at school have Internet access. **France** gives all job-seekers an entitlement to 14 hours' ICT training, with the possibility of a 21-hour extension to develop basic skills in this domain. A number of countries have paid special attention to increasing participation by women in ICT training (**German** goal of 40% by 2005). **Portugal** is making ICT skills an explicit part of the national secondary curriculum, and **Ireland** includes them as a basic competency in many measures for social or labour-market integration.

- pedagogy of ICT

33. Growing weight is now attached to how ICT is used as a learning and an educational instrument. In **England** the National learning Network Transformation programme, still at its formative stage, is designed to embed eLearning in the post-16 sector. A significant part of **Italy's** Action Plan for the New Economy is dedicated to ICT education and training. In 2003, a project called "PCs for young people" was launched to promote the use and acquisition of computers. To accompany the objective of achieving a computer/student ratio of 1 for 10 by 2004, an Action Plan for the ICT training of teachers and a national programme for promoting the use of ICT as part of the didactic tools were launched in 2001. In **Finland** the project 'citizenship skills in the Info. Society', which included immigrants and the over-60s, is part of the strategy 'Education, Training and Research in the Info. Society 2000-04'. In French-speaking **Belgium** in July 2002 the Government adopted a strategic plan to incorporate ICT in the school curriculum, and the **Walloon** region has a *Plan Mobilisateur TIC*, set up in conjunction with the private sector, which helps give job seekers access to ICT. In developing new training programmes for occupations in the IT and Media sectors, attention has been given to how to ensure that the new programmes and examinations are themselves flexible and dynamic (**D**).

- ICT as a tool for access to learning

34. The internet is widely used as a means for building up partnerships between and the accessibility of different organisations and ministries. **Luxembourg** has built up a series of Internet resource centres (one in each local administration area) to provide hands-on IT experience. **Norway** sees development of ICT as a tool to broaden access to knowledge and create flexible and user-friendly opportunities. It has developed a CD-ROM to motivate and train adults how to use the Internet, while a **Danish** NGO (DaneAge Association) organises free courses for senior citizens.

- teachers and trainers

35. A theme common to many countries' replies is the key role of teachers and trainers (**D**, **Northern Ireland**, **Greece**) how to improve their ICT skills (**N**, **DK**) and how to improve ICT-based pedagogy (**F**). In **Greece**, teaching of IT in all grades of secondary education has now been achieved, and the emphasis is now on achieving the same in primary education. The aim has been that all teachers should have had IT training by 2002, while networks have been put in place to provide further up-dating, also through distance

training of teachers skills in this regard. **France** is currently establishing a national pole for identifying good content and pedagogic practice.

Promoting LLL in the workplace (Q8)

36. Possibly because of how the replies were drawn up, most reports from Member States have very little detail on new initiatives in this regard originating in the workplace (but see also paragraph A.6 above). Even familiar concepts such as the learning organisation or *l'organisation qualifiante du travail* are noteworthy for their absence. However, the Investors in People (IiP) programme continues to grow in the **UK** – with **England** increasing support especially for SMEs and **Scotland**, where 35 000 companies participate, also continuing to use it as a key tool in developing learning organisations. In 2002, the **Netherlands** introduced Investors in People and launched a major programme to promote training in SMEs, including training for training advisors and the development of a self-diagnostic instrument for firms. **Portugal** highlights targets for minimum annual hours of continuing training, applicable to all workers and negotiated as part of tripartite agreements; such agreements also provide specific action for young workers with inadequate formal education.
37. **Norway** refers to additional funding and programmes to create more opportunities for continuing training for employees within the framework of the Competence Building Programme, and **Greece** highlights the training of self-employed people and of civil servants within the framework of the Structural Funds. **Finland** has a system of work-based learning in which 45,000 students participated in 2002. A new programme for on-the-job learning includes the aim to train 10,000 teachers and 20,000 on-the-job instructors within 5 years, co-financed by the ESF. The workplace development programme TYKE has contributed greatly since 1996. In that country, SMEs, especially in the metal sector, are very active in workplace learning development. In **Belgium**, a project is under way in **Flanders** to examine work-experience data banks in which supply and demand will be connected, and the **Walloon** authorities provide financial incentives for greater training of active workers, and matching demand for skills with supply. **Denmark**, in its *Integration Action Plan*, sees the enterprise as one of the places for teaching **Danish** to immigrants, and **England** emphasises the role of employers in terms of improving basic skills by offering literacy, language and numeracy courses (Employer Training Pilots, launched in September 2002).

Incentives for companies to invest in LLL (Q9)

38. In the **UK**, the small Firm Development Account (SFDA) pilot project (**England**) offers financial incentives to small firms to submit development plans and then to organise training; the **Scottish** Skills fund (SSF) was established in 2001 to improve high-quality in-work training at sector level (UKL 0.5m p.a.). Also in **Belgium (Flanders)** SMEs participate in a programme of November 2002 whereby the Flemish government provides training cheques. Other initiatives such as the *Godfather Project* promote loans, on-the-job training, and alternative-learning study groups. The **Greek** report refers to the use of funds under the Competitiveness Operational Programme to support the development of integrated business plans including study and training activities for those under 35 years of age. **Austria** has introduced new tax incentives for both individuals and firms covering certain expenditures on education by people who are working. Providing incentives to invest in LLL is a strong feature of the **Italian** report, which mentions interprofessional training funds run by social partners and organised at territorial level (financed through employers' contributions), and a law from 2000 which recognises a general right to lifelong learning and introduces training leave schemes and tax cuts

Teachers, trainers (Q 10)

39. Several reports refer to the new role in which working in a lifelong learning context places teachers, trainers, counsellors, tutors, etc. The challenges facing all of these groups derive not just from changing structures and institutional frameworks, but also the enormous changes in teaching and learning methods deriving from the introduction of new programmes and curricula, but above all from the widespread use of new information technologies in all their forms. The teacher/learner relationship has undergone, and continues to undergo, fundamental changes. To assist a large and disparate group of people to face up to, welcome and then adapt to these changes is a major task.
40. The **Netherlands** points out that the emphasis in teacher training is shifting from skills-based education to seeing the teacher as a coach for independent learning. **In Northern Ireland**, a number of initiatives have been taken to develop initial teacher education and early professional development (second and third years of teaching practice) in both schools and further education. The aim of a 2001 national training project in **Scotland** is to deliver immediate training opportunities to practitioners in all sectors, while there is a specific target to increase the number of full-time lecturers in Further Education who hold a teaching qualification to 90%. **Finland** has launched a 'Life as Learning' programme 2002-06 focussing on LLL within the education system, in working life and teachers' initial and further training. The **Netherlands** makes ICT-based training available for mature entrants into the teaching profession. **Greece** provides figures on the amount of retraining of teachers and, like **France**, emphasises the use of distance learning techniques in this connection for teachers and trainers, whether within the formal education system or not. The retraining of learning facilitators (trainers, teachers, tutors, and educators) is central to the **Italian** strategy, with a particular recent focus on apprenticeship tutors and tutors for young people who mainly have a guidance and counselling role. Other actions in **Italy**, partly funded through the ESF, include distance training of trainers and pilot initiatives for the retraining of school teachers, while a 2001 decree introduced quality criteria for training bodies which need to be certified to be able to apply for public funds. In **England**, the emphasis appears to be on the skills of those providing guidance and counselling whether they are doing this as personal advisers in the *Connexions* service or as careers education teachers in schools. **England** also refers to proposals in the November 2002 report on Success for All, which emphasised the need for developing leaders, teachers, trainers and support staff in the Further Education sector. In **Wallonia** new laws have been introduced to identify competencies and axes of training in order to adapt the educational systems more to LLL. A text of July 2002 deals with training of students in higher institutes (CAPAES) At the Regional level training of trainers has become one of the main tasks of the FOREM (employment service) since a new decree of March 2003.
41. **Luxembourg** underlines the particular problems of teachers in adult education, who may not have adequate (or indeed any) pedagogical training. A **Finnish** programme targets teacher needs in adult education. Universities and polytechnics will be looked at shortly. **Ireland** too provides opportunities to develop skills in the specific pedagogy of adult education, both for undergraduate teacher trainees who can take adult education as an option and for graduates who can combine it with training in guidance and counselling or human-resources studies for the business environment. In **Flanders** the DIVA project group 'Specific courses for trainers in adult education' started writing occupational profiles of experienced trainers of adults at the end of 2002, followed by working out of basic skills and standards of competencies and modules for learning courses that should be ready by the end of 2003.

IV. Adequate resourcing

Government targets for investment in human resources (Q11)

42. In the current budgetary climate, the lack of targets expressed in financial terms is perhaps unsurprising. While many replies contain some budgetary information on individual initiatives, most targets are expressed in terms of participation rather than investment. Thus **Belgium**, for example refers to a commitment to achieving a learning society for all – or at least for all inhabitants aged between 25 and 65 years – in **Flanders** by 2010, and **Wallonia** has fixed the target of achieving a 50% increase in the level of participation in vocational training compared to 2000. It is noted that budgets for training have considerably increased in 2003, and some budgets for technical training have doubled in recent years. The **Netherlands** aims to ensure that the percentage of the population undergoing some form of education or training is as high as the top two EU Member States. It reports good progress, and additional funding continues to be made available in specific areas (improvement of VET, basic qualifications for previously unemployed people). **Ireland** sets out a range of targets, expressed either as percentages of the population concerned (e.g. a 90% retention rate to completion of upper secondary education), or in the form of international benchmarking (e.g. for participation in post-secondary education and training by reference to the top quartile of OECD countries).
43. Some countries are clearly addressing the broader economic issue of investment in human resources. For example in **Germany**, following a parliamentary decision, the Federal Minister established an independent expert commission on the financing of LLL. In 2002, this commission published a review of existing LLL provision, demand and participation, while its final report and recommendations are expected at the end of 2003. Some replies point to the relatively high investment (compared with other OECD partners) in education (**N**) or to recent increases in educational expenditure (**D**). There is more emphasis on expansion of spending in relation to the adult population (**GR**) rather than on initial (primary and secondary) education. **Austria** observes that its expenditure on education is already above international averages, and it is focusing on maintaining investment, increasing its efficiency and catering for increased access. **France's** priority for 2003 is the implementation of validation of informal and non-formal learning, including the establishment of a national nomenclature of qualifications, an information and guidance network and measures to ensure access to a qualification to facilitate employment. As part of the *Pact for Italy*, a target of 700,000 adults annually participating in further learning has been set.

New or re-directed funding for new priority sectors (Q12)

- second-chance access to basic education

44. Recognition of the responsibility of the state for funding all initial education and training and to provide support systems enabling people to avail of the opportunities provided seems universal, but the messages relating to continuing education and training are less clear. Overall, the reports emphasise access free of charge for adults who have inadequate educational qualifications to basic and further education programmes. This can be seen as second-chance provision of State funding for initial education irrespective of the age of the individual. Under the Adult Education Reform Act, from January 2001, in **Denmark**, new financial support systems (in 2003, DKK 2.3 billion) are available for adults participating in basic and further general education and in vocational adult education. In January 2003, **Sweden** introduced a new adult education recruitment grant scheme. This scheme aimed at people aged 25 to 50, with relatively little initial education, is designed to enable them to undertake basic adult education at the equivalent of basic and upper secondary education level. The budget provided is SEK 2 billion per year and it is expected to support about 30 000 full-time students. In **Finland** the Ministries for Education and Labour have joined in a new 5-year programme to boost learning among the least trained and to encourage those between 30 and 54 to study for a secondary qualification and computer driving licence. About ten percent of training is geared to the needs of business which defrays half the costs. In the **UK**, the Extended Schools

Programme in **England** (described in paragraph C.20 above) is receiving £52.2 million over the period 2003 to 2006, and **Scotland** plans to invest £40m in community learning partnerships for adult literacy and numeracy by 2006. In **Ireland**, spending on adult literacy has increased nineteenfold since 1998, possibly reflecting a reaction to the results of OECD studies.

- Better value for money

45. Generally, rather than on new funding there is an emphasis on getting quality for the money spent and on seeing how money should best be channelled. **France** indicates that money previously devoted to artistic education will be used for recruitment of additional teachers and increased educational expenditure. In 2003 resources are being concentrated on supporting groups in difficulty, strengthening basic education accreditation of non-formal learning and providing ICT in schools. Adult vocational education and training initiatives will focus on groups least likely to have access to upgrading of their skills (SME workers, especially in the services sector where employment is precarious). In **Finland** adult student grants and loans have been made available since 2001 for employed adults and entrepreneurs who want to upgrade their training and skills on their own initiative. Grants are also available to those who take leave to study and lose income, under certain conditions.

Stimulating private investment in education (Q13)

46. In contrast with initial education and training, there is a greater emphasis on the responsibility of employers and the individual for continuing training, particularly at the higher competence level. The **Swedish** proposal in a 2002 bill, approved by the parliament, is based on the assumption that the acquisition of knowledge and competence development is a tripartite responsibility between the individual, the employer and the state. The initiative has not yet been introduced and is under further investigations, so that a more detailed bill will be presented in the near future.
47. If the idea that money should follow the learner (**DK, NL**) has growing acceptance, precisely how this can best be organised remains open. Should money be channelled through employers, the providers of learning opportunities or directly through the learners or a mixture of all three? In the **UK (England)**, not only has support to employers, particularly in SMEs, been increased through the Investors in People programme, but so also have educational maintenance allowances, for example for young people to remain on in school.
48. The introduction of individual learning accounts (ILA) (**UK, S, NL, A**) has in some instances been accompanied by some difficulties. New ILA schemes are about to be launched in the **UK (Wales and Scotland)**. Many financing systems are in the process of review, but arrangements which ensure that "successful" schools and other learning places are rewarded by attracting additional resources are in some instances already in place or being put into place. In **England**, for example, higher funding rates linked to performance will apply from 2004/05. In **Belgium (Wallonia)** there are financial and other incentive available to adult workers, including the *cheque-formation* and the *credit-adaptation* facilities.
49. There is very little mention in the reports (except for **Greece and France**) of funding of learning by employees through levies on employers on a national or sectoral. **France** points out that employers' contributions to vocational education and training for their employees amount to 3.16% of payroll, compared with a legal requirement of 1.5%, and it focuses more on securing private-sector involvement in the organisation and content of the activities financed rather than on increasing the level of investment.
50. There are differences in relation to the financing of higher education, although this is not a theme covered directly in many of the reports. The **Swedish** report argues that higher

education should be free of charge for students, who should also obtain advantageous conditions for study grants. The recent or current discussion on student fees and support systems in many countries (e.g. **D, UK, IRL**) should perhaps be placed within an LLL framework, as its outcome is clearly likely to have an impact on access to, and uptake of, learning opportunities at a later stage in life. In **Austria**, vocational HE is privately organised, though with state subsidies per student and, as in many other countries, institutions are encouraged to look for additional funds from other sources

51. Particularly in countries where education and training and also guidance and employment services have been essentially a public function, an issue is the creation and effective regulation of a market for educational and training providers. There has been recent legislation on this in some countries (**D, F, IT**), with a particular emphasis on quality control.

Public-private partnerships (Q14)

52. There seems to be a need to define what is meant by public-private partnerships. Many countries already have long traditions of substantial parts of their education and training systems being run and, to a more limited but varying degree, also financed by private bodies. But these are mostly non-profit organisations (churches, social partner organisations, professional groups, etc.). The reports do not suggest that there has been either a substantial increase in, or a major role for, private-sector investment in educational institutions. On the other hand, there is a widespread view that learning must be paid for, not just by public authorities, but also by employers and the individual. This is encouraged by tax relief on educational expenditure for both companies and individuals (**DK, I, S, NL**). In **Denmark** also, expenditure by the individual on continuing vocational training is deductible for income tax purposes, as are any contributions, e.g. from employers, towards expenses in that connection. There are however schemes like the *Connexions Card* in **England**, which has the objective of encouraging young people to stay in learning, where the private investments would appear to be offering some services to the “learning” public at a reduced cost or free of charge. In **France**, where the training levy system is well-developed and investment in training runs at around twice the legal minimum, the emphasis in public-private partnerships is not on financing, but on promoting substantive participation from industry in the definition of the content of training. In its reply on local-level partnerships, **Austria** notes that 40% of its schools receive sponsorship from industry, though it does not indicate how significant this sponsorship is in terms of overall school finances. **Flanders** mentions a new decree which is being drafted to regulate conditions for public-private partnerships. It has introduced a number of initiatives, especially in the ICT area, including the ‘Digikids’ partnership between prominent firms, the media and the government, which has helped 1,700 schools with access to the internet. **Ireland** notes that an education technology investment fund established by the government to tackle skill needs via further education has not attracted private funds as hoped: some firms contribute large-scale resources to specific ventures in third-level colleges, but are reluctant to contribute to a more general fund. Other public-private partnerships identified in that country are a matter of financial engineering of public investment rather than education-based partnership.

V. Facilitating access to learning opportunities

Barriers to access to learning, social inclusion (QQ15, 16)

53. All countries speak of removing barriers to learning and improving access for various groups, particularly for those affected by social disadvantage due inter alia to difficult urban or rural environments, for immigrants or ethnic groups and for those who have not completed basic education. Many responses also indicate that schools and other educational institutions should be much more open to their local communities and to each other.

- social inclusion

54. Social inclusion is particularly emphasised, and this is reflected in **England** through a number of measures concerned with neighbourhood, ethnic or similar exclusion issues. Most countries have many measures targeting various groups. Target groups range from the general (poorly qualified adults) to the specific (immigrants, asylum-seekers, Roma) in a local context. The replies emphasise categories outside the compulsory education (4/6 to 16/18-year-old age) age-group. Reintegration schemes for jobseekers commonly include a training component (**NL, F**). **Greece** and **Germany** identify all-day schools as a means of counteracting exclusion both in terms of providing a better education to young people, but also enabling parents, particularly mothers, to work or improve their qualifications. **France** stresses ICT-based ODL, especially for pupils with handicaps, children in remote rural areas or in hospital, and a website is being developed to facilitate continuity in the education of travellers' children. ODL, including satellite TV, is also being used in vocational training in **France** to facilitate access, especially by SME owners and employees. **Italy**, partly with the support of ESF funds, has been tackling the issue of early school leaving, in particular through the setting-up of resource centres in urban as well as in peripheral and isolated areas. **Ireland** also stresses prevention of early school leaving, including holistic approaches combining school-based and out-of-school measures for particularly vulnerable target populations, and the development of links to third-level institutions to encourage the children concerned to aspire third-level education.

- immigrant and ethnic groups

55. Countries differ in how they categorise those from various ethnic or national backgrounds – immigrants, asylum-seekers, refugees, ethnic minorities, Roma, etc. – for the purpose of specific initiatives. However, the important place given them in many of the reports underlines an increasing concern about successful integration of such groups into society generally. Effective language provision for all such groups, particularly the language of the host country is seen as a vital issue, and projects on approaches to doing this successfully are mentioned in many reports (**DK, D, GR, L, UK, N**). **Greece** refers also to its specific problems with the sizeable number of Greeks who have returned from abroad. In addition to literacy and basic education for immigrants, the **Netherlands** is unusual in also highlighting a literacy campaign for members of its own native-born population as a means of combating rejection of immigrants. Its integration programmes targeting immigrants are moving beyond a focus on language training to include a dual vocational training component, and it is also the only country to indicate that it has launched an action plan to improve the labour-market status of more highly-qualified refugees through recognition of their qualifications. In **Denmark**, the public library system is providing special services to ethnic minorities. **Italy** refers to the national action plan for social inclusion as part of the European Social Inclusion Process which includes a very wide number of measures for migrants, prisoners and people with disabilities: priority is given to incentives to companies to hire people from disadvantaged groups, integrated measures for the retraining of people with disabilities, apprenticeship schemes, literacy programmes and guidance and counselling services. According to a 1999 law, in **Finland** immigrants and asylum seekers have a right to an education and training plan within their first 3 years of arrival. Special interest groups in **Flanders** get precedence for financing, and exemptions from certain charges. The VDAP organises vocational education for a number of categories of disadvantaged persons. In **Wallonia**, decrees target specified categories of disadvantaged people following a policy of positive discrimination. There is an increase in the number of asylum seekers applying for training assistance, including both literacy training and ICT.

- gender equality

56. Gender inequality is referred to in some of the reports. The emphasis is as much on what has been achieved, e.g. increased female participation rates in higher education and vocational training, as much as in what remains to be done. Germany, however, refers to the need to expand female participation in the VET and particularly amongst VET trainers, while Greece is amongst those countries with an emphasis on gender equality in IT fields. In Wallonia, women training to acquire ICT skills receive special support for their children. Austria combats sex-stereotyping of scientific and technical careers through information campaigns and “taster” courses (short courses to allow prospective recruits to sample the tuition available). None of the reports comments on the increasingly noted problem of underperformance by males in school, which is often the first step towards social exclusion.

- prisoners and ex-offenders

57. Schemes for prisoners and ex-offenders include literacy and general education as well as vocational training, and **France** provides for accreditation of skills acquired while working during imprisonment

- access to ICT

58. Unequal access to ICT is also highlighted by **France** and the **Netherlands** as a factor of exclusion requiring specific remedies, e.g. through its inclusion in active labour-market support for jobseekers or through familiarisation in the context of adult learners’ weeks or measures targeting older learners.

- adults lacking basic competencies

59. Many measures are concerned with adult workers and unemployed people, and with the provision of basic competencies to those who missed out in their initial schooling is to the forefront. This can be done by accessing formal initial education (mainly secondary) programmes or through specific vocational or general adult education in various formal and in-formal settings. Literacy and numeracy programmes are mentioned in many reports, and a prominent place is accorded to accompanying support measures to help people openly speak of their educational deficits and be willing to follow courses. Several reports refer to the barriers that adults have in admitting the need for programmes relating to basic skills such as literacy and numeracy and refer to the need to help them across these. There are many opportunities in **Finland** for adults to pursue the upper secondary curriculum in folk high schools, adult education centres and vocational training institutes, which also offer information technology training. A family-based approach in **Scotland** appears to be an innovative one. In **Denmark**, two major trade unions for low skilled workers backed an action government action plan on competence development launched in February 2003. **France** has recently introduced a training contract scheme whereby unemployed persons without suitable skills spend part of their time in a training establishment and the remainder in a company which assigns an experienced worker to mentor them.

Young people (Q17)

60. Young people in general are not automatically identified as a specific target group for specific LLL policy measures, apart from tackling issues like early school leaving or literacy. This may reflect an incomplete appreciation of the concept of lifelong learning. However, the role and importance of youth organisations and youth groups is referred to in a number of countries and settings (**DK, GR, I, F**). In **Greece**, the *Youth under 30* programme is a collaborative effort involving 6 Ministries and amongst other things is concerned with the development of equipment in 500 libraries, programmes of health and consumer education and renovation of school buildings. There is also (e.g. **Northern Ireland, Scotland**) emphasis on retaining young people in the education system and expanding entry into further and higher education, particularly for those from

disadvantaged backgrounds. In the **Netherlands**, a personal education and training ID number is being given to every person up to age 23 (including school dropouts who are compulsorily registered) so that each year's school intake can be monitored and participation in and the performance of the education and training system can be tracked on a reliable, quantitative countrywide basis over time. In **France**, some measures target young people in "difficult" circumstances, but others indicate a more general approach to promote education for democratic citizenship: the latter include the creation of youth councils at national and *département* level and a legal formula to enable young people to establish associations while still minors. An **Austrian** law of 2001 offers financial support for youth organisations to train to fulfil their educational function, and a training "passport" for young people records both education and experience in youth activities. In **Finland** a law of 2003 launched a project to promote inclusion and prevent exclusion among the young, with 15 special measures. Efforts are being made at the regional level to improve young persons' life management and motivation.

Ageing population (Q18)

61. More surprisingly, very few activities specifically geared to older age groups are referred to. **England** speaks of encouraging older people to access mainstream learning, and has a well-established culture of "active ageing". **Austria** also provides explicitly for access by older people to higher education in cooperation with traditional adult education provision: LLL appears to be a well-integrated component of a wider-ranging set of policies on *Senioren* in that country. **Scotland** and **Italy** refer to ICT programmes specifically for older citizens and workers. Several of the measures mentioned in connection with the ageing population are linked to the European Social Fund.
62. In the context of demographic trends as they affect the individual workplace, **France** has a comprehensive set of measures to reduce the incidence of early retirement, including management of the skill and employment demographics of the firm to allow for timely retraining, using older workers as mentors for younger colleagues, validating experiential learning and career development reviews. **Germany** also refers to the issue of older workers in the framework of synergies and transfer of knowledge and experience from older to younger workers and report on research projects concerned with the place of older workers in an economy with rapidly changing work organisation and practices. **Austria** has an ESF-funded retraining initiative based on demographic perspectives and increased training allowances for people over 45. The "taboo" against retraining among older workers is noted. As mentioned above the new law of 2003 in **Finland** has targeted persons aged 30 to 54. **Flanders** on the other hand targets workers over 45 with special programmes. In **Wallonia**, special measures are taken to assist those over 50 in accessing vocational training. Some actions target the over-50s, others the over-40s. There are special reconversion cells whose tasks are to retrain older workers in cases of large-scale lay-offs, this being done in conjunction with the ESF and having an 80% success rate.

Guidance (Q19)

63. Information, guidance and counselling are seen as key issues by quite a few countries and many of the reports deal with new guidance initiatives, geared to specific target groups. If guidance was previously seen as being essentially to help young people make the transition from education to working life, there is now some evidence of an increased awareness of the fact that it must be permanently available, lifelong and life-wide, and supported by highly-trained personnel. However, there seems to be some way to go before one can speak of a coherent lifelong guidance system being widely available throughout the Union, nor is there reason to believe that access to guidance is widely available for those at work as well as in education.
64. There are nonetheless some promising signs. **Austria**, for example, has an apparently well-developed guidance system. The compulsory school-based vocational and study

guidance system has been substantially reinforced with IT-based support, and the school psychological service is also involved. Adult education advisors for people of working age are available in schools and the whole country is covered by a network of job information centres which give advice on vocational training which is available and required to take up jobs. **Italy** has a diverse guidance system with a good geographical coverage: alongside private bodies, a series of public bodies play an active role in providing guidance: vocational training centres, employment centres, youth guidance offices. **Spain** points out that its National Resource Centre for Vocational Guidance, which operates in conjunction with the Ministry of Education, is part of the Leonardo da Vinci *Euroguidance* network, one of whose objectives is to provide information at both national and European levels. **Norway** refers to a project specifically concerned with increasing motivation and also to a follow-up guidance service for young people, who have dropped out of school and are not in work or training. The use of ICT in guidance provision is highlighted in several reports: **Spain**, for example, has a portal for professional information and guidance covering issues like training opportunities including insertion and reinsertion courses and opportunities for evaluation and certification of competencies in addition to employment and professional mobility opportunities. **Ireland** has provided €35m to develop a comprehensive adult guidance system to be in place by 2006; it will include a web-accessible database of adult learning options. **Finland** has introduced many innovations. The shortage of student counsellors is being addressed. At the national and regional level there are guidance plans, the main principle of which is LLL. There are special information and counselling services for adults. A new educational portal which includes information and counselling has been opened, and a new extensive programme of the Ministry of labour is developing materials relating to working life, both of these measures receiving ESF funding. In **Flanders** the SOHO project assists students with their career choice and there is a pilot project to assist part-time vocational education guidance. An apprenticeship training scheme provides guidance and also helps lay the foundations for later entrepreneurship. In **Wallonia**, guidance systems mentioned appear to focus on those in vocational training.

65. **Norway** refers to the importance of validation of non-formal and informal learning in the context of removing barriers to further learning. While validation is not necessarily a guidance issue as such, it can be the first stage in identifying complementary training needs and provide motivation to complete the necessary training. A **French** instrument worthy of note in this respect is the *bilan de compétences* [assessment of competencies], discussed below (Q 21). The **Danish** parliament in April 2003 agreed an act reforming the entire initial guidance and counselling system. Combined with the 2002 act on Transparency and Openness in Education, it should enable young people to have a better basis for realistic choices in relation to their choice of educational programmes and occupation. A bill reforming adult guidance services is expected soon. The **Netherlands** launched a knowledge centre for assessment and validation of prior experiential learning in 2001.
66. In many and varied settings, the reports suggest a message that it is the negotiation process between the individual seeking education and training and the provider that is key to a better matching of supply and demand. Intensive lifelong and lifewide guidance is essential, above all in dealing with disadvantaged groups. A question not dealt with, but which seems important, is how far individuals can be obliged to receive and accept educational and vocational guidance and other types of counselling, for example as a condition of receiving social benefits.

VI. Creating a learning culture

Measures to promote a learning culture (Q20)

67. This section of the questionnaire inevitably gives rise to a certain amount of overlap with other sections, and the relevant information in other sections is, as far as possible, not duplicated here. In some countries, however, it is worth noting that the strong emphasis on pre-school care and learning (**NL**) is explicitly linked to the creation of a learning culture. **Greece** highlights the wider importance of parents and in association with parents' associations has developed a programme of parents' education.
68. **Austria** has asked teacher training colleges to place more emphasis on LLL in their curricula. The object is to create an awareness of the need for a lifelong commitment to learning including self-directed learning in children from an early age. While this is an important development, its impact will inevitably be very long-term.
69. **Norway** is planning an overall network for the education and training sector ("National Learning network", which provides access to information on all learning opportunities – the first step was the opening of a higher education portal in March 2003. In **Finland** the level of participation in post-compulsory education is so high that there is seen to be no great need for special promotion. In that country the strategy for 'Education, Training and Research in the Information Society' includes access to a virtual school, virtual polytechnic and virtual university. Universities have opened courses to all-comers, anyone can participate. The aim of the third-age university is to target elderly persons, regardless of age or prior learning.
70. Finland is only one of several countries in which initial vocational training has a poor image among young people, and there has been a campaign organised to change perceptions. This is targeted at comprehensive school pupils, their parents and career counsellors. In **Belgium** too (**Wallonia**), the attractiveness of vocational training is indirectly encouraged by the two new activities under the July 2001 law which introduced two new types of sandwich courses.
71. Few countries report specific measures aimed at promoting a positive image of learning. However, some countries have run media programmes to motivate people to learn. 40% of the population is thought to have been aware of **Denmark's** autumn 2002 one based on television, with 124 000 adults considering taking up a course as a result and by December 26 000 having actually done so. Several measures highlighted during the European Year of Lifelong Learning have been adopted by several countries. Thus, a number of countries (**UK, L, NL**) have adult or more general learners' weeks, involving networking of adult education centres, community groups and centres, libraries and museums to bring learning closer to people. In several countries (**UK, NL, A**) these include "taster courses" which may be held where people gather socially (leisure centres, pubs etc.) rather than in the traditional learning institutions. Student and careers fairs in several countries (**F, A, IRL**) contribute to the promotion of a learning culture. **Ireland** also refers to a number of initiatives supported by business (Young Scientists' Competition, Young Enterprise Award etc.) which are widely reported in the media and encourage young people to take part in project work and other activities which support their formal education.

The life-wide dimension of LLL (Q21)

72. One of the key issues is the creation of qualification structures and systems which without sacrificing quality are flexible and comprehensive, and provide progression for all learners from one level to another. The objective should be a qualifications framework which not only integrates the different streams and levels of general education and learning, but also those of vocational and technical education and training. Many reports refer not only to this, but also to the need to find ways of recognising prior learning and particularly skills and competences obtained on the job (**E, F, I, L S**). In a sense a qualifications structure could be said to be the skeleton on which, from an individual's point of view, a lifelong learning strategy could be hung and developed.

73. Most countries report on some initiatives in this field, but they vary in scope and ambition and many are still in the process of development. In **England**, in early 2003, Ministers requested the Qualifications Curriculum Authority to continue its work on the “unitisation” of qualifications, with implementation in four phases expected to be completed in summer 2007. The **Scottish** credit and qualifications framework provides a single, unified integrated framework encompassing a wide range of education and training provision. In **Finland** one can take secondary qualifications based on competence, however acquired, and it is legally possible, to participate in examinations for comprehensive and upper secondary school without having participated in the relevant formal courses normally leading to these examinations. **Ireland’s** new qualifications framework (from basic literacy to doctoral level) reflects a commitment to accreditation on the basis of outcomes irrespective of the learning context, and provides for modular recognition of partial competencies. A 2002 law on **Spain’s** new qualifications framework allows for evaluation and recognition of non-formally acquired competencies, including partial recognition in certain circumstances. Special attention is given to groups such as early school-leavers, unqualified adults and immigrants for whom these facilities are especially relevant. In **Wallonia** there are two routes which ensure passage from the non-formal to the formal sector, one for secondary level and the other for university. Recently there has been an initiative to ensure validation of competencies within LLL, within the context of the Lisbon Council 2000 objectives.
74. The **French** *bilan de compétences* (review of competencies) is a particularly well-structured measure designed to promote validation of non-formal and informal learning. For every five years in employment, each worker is entitled to an in-depth review of his/her skills. This is of benefit both for the individual and for the firm, allowing both to be aware of the worker’s existing capabilities, career development options and possible training needs or scope for validation of experiential learning. Job-seekers are also entitled to use this service, which is provided by a countrywide network of public centres.
75. Intimately linked to the identification of competencies (where the individual him/herself is the primary target) is the issue of their validation (which is particularly relevant for prospective employers). An illustration of this is the **Norwegian** “real competence project”, which provides a way of documenting all skills, knowledge, abilities, attitudes and insights that people may have gained from formal, informal and non-formal learning. The documentation is the property of the individual and the arrangements supporting the system are jointly underpinned by the state and the social partners. The 2001 adult education reform in **Denmark** provided accreditation of prior learning and a personal study plan within a VET framework. **Ireland** and **Portugal** have taken recent measures to develop comprehensive qualifications frameworks combined with accreditation systems which provide for recognition of competencies however acquired. In 2002 **France** introduced legislation creating a right to validation of prior learning, including the right to special leave and financial assistance to undergo the validation process, which can constitute all or part of the basis of a qualification. Experience gained outside the workplace, e.g. in voluntary activities, can be taken into account. This radical departure is supported by a national nomenclature of qualifications, a publicity campaign and the creation of a country-wide network of advice centres. In **Austria**, on the other hand, partial validation is the norm: informal learning can be used as a partial basis for access to examinations – a new bill on CVT will allow accreditation of PEL to count for up to two-thirds of study time – but accreditation without passing the examinations is rare. This approach arguably strengthens the learning culture, inasmuch as informal learning has to be complemented by formal study to prepare for the examinations.

VII. Striving for excellence

Improving the quality of lifelong learning provision (Q22)

76. Many of the reports reflect concerns for ensuring quality of provision. Some of these quality mechanisms are specific to the education and training system, others result from wider-ranging initiatives concerning quality in the provision of public services or services contracted out to private operators. In **Sweden**, quality is being enhanced at all levels (from pre-school to tertiary) and a new system for evaluating quality in higher education has recently been launched. With this in view the National Agency for Education was, in spring 2003, split into two separate agencies with one focusing on monitoring and evaluation. Schools and municipalities must present annual quality reports. In **England** in April 2001, a new national framework for raising standards was established with a Common Inspection Framework. Under this there is a formal assessment of every provider twice each year. In **Scotland** and **Wales** too there are moves to create a quality management framework for all post-compulsory education and training. The **Austrian** government has recently established a commission on the future of schools whose tasks include developing a national quality management system and identifying performance criteria. Reference is also made to improvement of teacher and trainer education and development (e.g. **Northern Ireland, Luxembourg**).
77. As part of a wider initiative to improve the quality of services contracted out to private operators, **France** introduced specific measures in 2002 concerning VET, including requirements concerning the qualifications of training agency staff. Many countries (**DK, Scotland, England...**) indicate that most measures have a provision for review, which is often an independent one, within a certain fixed period, and often before a measure is mainlined or made permanent. In **Italy**, measures have recently been introduced to evaluate the quality of education and training processes, systems and outputs
78. **Norway** is about to establish a *Learning Condition Monitor* to find benchmarks relating to what provides good conditions for learning in adult life. In **Finland** a number of legislative, structural and operational measures have been made to ensure the quality of education and training provision; responsibility is that of the providers and two specialist councils who undertake appropriate evaluations. In **Flanders** the inspectorate checks schools to ensure they are fulfilling their social tasks and that community funds are being used responsibly. There is also a decree which allows for the internal and external monitoring of the quality of university tuition. There is an annual evaluation of the execution of the action plan for LLL and a special Inter-Cabinet Group meets regularly to discuss progress in the area of LLL. In **Wallonia** there are also instances for improving education and training provision, and the employment and training service *FOREM* is undertaking a quality process which includes a follow-up to track trainees for 6 months to one year after tuition ends.

Review of policies and assessment of the links to other policy fields (Q23)

79. Responses on this topic were generally quite limited. In **Greece** a special service for horizontal monitoring of ESF actions looks at the progress achieved and the effectiveness of interventions. In **Austria** too, ESF involvement is identified as the trigger for some monitoring mechanisms, suggesting that the review evaluation culture associated with the structural funds has had some influence on national practice. **Austria** also mentions its participation in an OECD country review of adult learning as providing the occasion for coordination, consultation and consideration of future reforms.

Annex

QUESTIONNAIRE on the Follow-up of the Council Resolution Lifelong Learning

INTRODUCTION

In its Resolution of 27 June 2002 on Lifelong Learning⁹, the Council of the European Union considered that "education and training are an indispensable means for promoting social cohesion, active citizenship, personal and professional fulfilment, adaptability and employability". Lifelong learning "facilitates free mobility for European citizens and allows the achievement of the goals and aspirations of European Union: to become more prosperous, competitive, tolerant and democratic".

The Council also welcomed the Commission's Communication "Making a European Area of Lifelong Learning a Reality"¹⁰, noting that it establishes lifelong learning as one of the guiding principles for education and training.

To pursue the objectives and priorities stated in its Resolution, the Council invited Member States, within the framework of their responsibilities, to pursue an important number of policies and actions. It also asked the Commission to prepare, in co-operation with Member States, a progress report on the follow-up to the Council's Resolution and the Commission's Communication before the European Spring Council of 2004. Candidate and EEA countries will participate in this exercise, according to the conclusions of the Bratislava Ministerial Conference (June 2002).

In the light of the "integrated approach" to policy initiatives in the field of education and training, which seeks to facilitate convergence and coherence, this report will be part of the interim report on the Follow-up of the Work Programme on the Concrete Objectives of Education and Training Systems due to be presented in time for the Spring 2004 European Council.

To prepare this report, the Commission needs the contribution of the competent authorities in Member States, Candidate and EEA countries, in order to gather the necessary information on the progress of the different countries in defining and implementing lifelong learning strategies and policies.

The Commission is aware that a large consultation has followed the publication of its Memorandum on Lifelong Learning, in October 2000¹¹. This consultation resulted in the Commission having access to extremely useful information on the views and perspectives on lifelong learning from Member States, candidate and EEA countries, and civil society.

This information was very useful in terms of preparing the subsequent Communication and also in terms of providing a very detailed picture of the situation in the different countries.

Also in the context of the European Employment Strategy, Member States submitted their national action plans in May 2002 which provided further information regarding national lifelong learning strategies, although mainly from a labour-market perspective. The Commission will also use the information contained therein as part of this lifelong learning report exercise. However, Member States will submit their new national action plan – related to the new generation of guidelines – only after the summer break, i.e. too late for consideration as part of the Commission's report on the implementation of the lifelong learning resolution and Communication.

⁹ Council Resolution of 27 June 2002, no. 2002 163/1, OJ C163, p. 1

¹⁰ COM(2002) 678 final (November 2001)

¹¹ SEC(2000) 1832, of 30 October 2000

With this questionnaire, the Commission therefore does not ask countries to duplicate the amount of work already done. When filling out the questionnaire, countries are invited to **provide only relevant new information** on lifelong learning policies, strategies, and on recent policies, programmes, projects, and actions.

A first draft of this questionnaire was distributed to the Group of National Lifelong Learning Co-ordinators during their meeting in Brussels, on 2 December 2002. The present version takes into account comments made during the meeting and the written comments forwarded to the Commission in the meantime.

Countries should return the questionnaire to the Commission no later than 30 May 2003, in time for the Commission to be able to prepare its report during the summer. They should be addressed to:

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QUESTIONNAIRE

ON THE IMPLEMENTATION OF LIFELONG LEARNING BY MEMBER STATES

The Council Resolution on Lifelong Learning invites Member States to "develop and implement comprehensive and coherent strategies reflecting the principles and building blocks identified in the Commission's Communication and involving all relevant players, in particular the social partners, civil society, local and regional authorities". The Council also asks Member States, "in conjunction with the European Employment Strategy, to mobilise resources for those strategies and to promote lifelong learning for all by setting targets for an increase in investment in human resources, including lifelong learning, and optimising use of available resources, developing initiatives to stimulate private investment in learning and considering a more targeted use of Community funding resources, including the European Investment Bank".

I. GENERAL FRAMEWORK

1. Describe the legislative and financial framework in which lifelong learning strategies are implemented in your country. In the case of regional governments or decentralised decision-making, please detail the responsibilities of the different levels of Government in this process.
2. Describe how your Government ensures effective co-ordination and coherence in policy between different Ministries and departments as far as the definition and implementation of lifelong learning policies are concerned.

II. BUILDING-UP PARTNERSHIPS

3. Local level partnerships. Describe measures taken in order to foster local level partnerships in the definition of actions or projects intended to promote lifelong learning for all.
4. Social partners. Describe how the involvement of social partners in the definition and implementation of lifelong strategy and policies is being ensured.
5. Schools and Universities. Describe specific measures aimed at fostering the participation of schools and universities in lifelong learning programmes and projects.

III. INSIGHT INTO THE DEMAND FOR LEARNING

6. Describe how your Government ensures that everyone has access to the basic skills that should be provided to all citizens as a necessary foundation for any further learning.
7. Describe recent measures aimed at developing ICT skills for the general population or for specific groups of citizens, as a means to improve access to the knowledge society.
8. What recent measures have been taken to promote learning at the workplace?
9. Have specific incentives (financial, fiscal, etc.) been recently introduced to help economic sectors and / or companies (in particular SMEs) to implement lifelong learning programmes and actions in your country?

10. Describe recent measures taken to support the role of learning facilitators (teachers, trainers, adult educators, guidance workers, etc.) and their adaptation to the needs resulting from the implementation of lifelong learning strategies and policies.

IV. ADEQUATE RESOURCING

11. Has a target for investment in human resources been established by your Government and, in the affirmative, what is that target? What progress has been achieved so far as regards the achievement of this target?
12. Has new funding been accorded to, or existing funding re-directed towards, new priority sectors (e.g., pre-school learning, non-formal and informal learning, adult education, etc.)?
13. Describe initiatives undertaken to stimulate private investment in education (e.g., public-private partnerships).
14. Give examples of private-public partnerships (PPP) in the field of lifelong education and training (e.g. joint funding to develop infrastructure and/or human resources).

V. FACILITATING ACCESS TO LEARNING OPPORTUNITIES

15. Describe measures taken to improve access to learning, by removing the most important barriers to learning (age, social barriers, geographical barriers, motivation, etc.).
16. Groups at special risk of exclusion. Describe measures addressed at promoting lifelong learning amongst groups at special risk of exclusion from the knowledge-based society (migrants, people living outside urban centres or in disadvantaged neighbourhoods, single parent women, etc.).
17. Youth. What specific measures address improving the participation in lifelong learning of young people, not covered by the formal systems of education and training?
18. Ageing population. Have specific measures been taken addressed at improving the participation in lifelong learning for mature workers and citizens who have not had the benefits of post-compulsory education and who need to upgrade their competencies to remain in the workforce, or senior citizens preparing for retirement?
19. How are guidance and counselling services being developed to meet the needs of specific target groups and to raise awareness of the benefits of learning?

V. CREATING A LEARNING CULTURE

20. Describe measures taken to promote positive perceptions of learning and raising awareness of its entitlements and benefits, at pre-school, school and higher education levels, as well as in youth organisations and among the adult population.
21. How does the formal systems of education and training take account of the life-wide perspective and, in particular, how are entry, progression and recognition requirements in the formal sector (e.g. mechanisms for accreditation of prior learning, methodologies and systems for assessment and validation of competence) being adapted accordingly?

V. STRIVING FOR EXCELLENCE

22. Describe the general framework for improving quality of lifelong learning provision and, in particular, for evaluating lifelong strategies, programs and projects in your country?
23. Is there a mechanism to regularly review these strategies and to assess their relevance, effectiveness and synergy with other Government policies and initiatives (lifelong learning and employment, innovation, research and development, etc)?