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DRAFT

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

Acceding and candidate countries

Drawn up at the request of the European Commission by the European Training Foundation (ETF)

Introduction

This document was prepared by the ETF on request of the European Commission. The aim was to provide a thematic analysis of the country reports prepared by the acceding and candidate countries as answers to the questionnaire launched by the EC on the follow-up of the Council Resolution on Lifelong Learning.

Actually, the document considered the reports coming from Bulgaria, Czech Republic, Cyprus, Hungary, Lithuania, Malta, Poland, Romania, Slovenia, Turkey, Slovakia and Estonia. It took also into account the ETF knowledge acquired on these countries through continuous work in them since 1995 and materialised in particular in the “Monographs on Lifelong Learning systems and public and private employment services systems”, prepared for all acceding and candidate countries with the exception of Turkey. It took also benefit from the cross country report on “13 years of reforms and cooperation in VET in the candidate countries”, presented as a draft to the last meeting of the ETF Governing Board 17 June 2003, and from recent events organised by the ETF in particular the Athens conference 23-24 May 2003 on “Lifelong Development of Competences and Qualifications: roles and responsibilities” involving all candidate and acceding countries.

Although the questionnaire made clear the need for the countries to concentrate “only on new relevant information” (since the consultation process on the memorandum on LLL in Spring 2001), many reports gave a wider overview of activities undertaken in the wider framework of reforms and projects in the fields of education and training. Therefore it was sometimes difficult to identify which initiatives were really new in the set of initiatives presented in the country reports and as a consequence, the document below was also constrained to adopt this wider view¹. In addition to an analysis of the country answers, the document tries to provide an assessment of the general situation as it is now in the different thematic fields rather than an assessment of the measures as most of them are too recent and often still not implemented.

The document also identified good practices as well as promising initiatives it seemed interesting to report on as they illustrated well the way of reasoning and also the state of progress in the countries concerned. Therefore, all boxes highlighted below in the text should not be considered all as real Good Practice, and the text tried to select them by the mention GP. Selection was also difficult due to the fact that some concern the implementation of concrete policies as others refer to projects still to be translated in concrete measures. Nevertheless, in total, 31 Good Practices were identified, numbered in the text from GP1 to GP 31. .

It's not possible to make any ranking among countries on the Good Practice score as all reports were not homogenous both in length (from 7 pages for Malta till 21 for Poland) and in contents, as some countries didn't answer all questions and Romania didn't follow the structure of the questionnaire.

¹ In this context, Turkey presented a particular case as no consultation process had been organised in 2001

1. Main conclusions

- Two years after the end of the consultation process on the EC memorandum on LLL, situation didn't change radically in the acceding and candidate countries, but **a range of important initiatives have been taken in most of them** although they still reflect the persistent imbalance between the formal and non-formal/informal components of the LLL systems, and they were too recent or even on-going so that not any assessment is possible yet. However, some other initiatives had been taken earlier they started to be implemented during these years. Thus, some results are already there, but in general, as for education reforms in general, there is a long way from decisions to concrete implementation.
- As noted in the cross country report prepared by the ETF in summer 2001² the consultation process had provoked many debates about education and training issues and had "*well helped to speed up reforms especially within adult education*". However, it's clear that the preparation for the European Employment Policy and for the ESF has been also an important driver for reforms aimed at developing LLL. Finally, **the increase and diversification of Phare funding** covering now most of the main LLL priorities through a range of activities supporting the renovation of schools, providing technical equipments, modernizing and creating counselling and guidance centres etc, as well as UNDP grants and World Bank loans in some countries, the **developments of the EU programs Leonardo da Vinci, Socrates and the EU initiative EQUAL** play now a significant role in the major fields of reforms of the education and training systems.
- As noted in many reports, as part of these EU and international support, the Phare contribution through the Economic and Social Cohesion scheme aimed at preparing for Structural Funds and in particular to the ESF and based upon the preparation of National development Plans, Community support frameworks, Single programming Documents, Regional and Sectoral Operational Plans is predominant.
- However, **situation is very different among countries**. The most ambitious and significant initiatives are in the countries they were already the most advanced in terms of VET reforms, as analysed in the cross-country monographs report³ such as **HU** and **SLO**, but also in the countries that invest more in education⁴ such as **EE**, **LT**, **CY** and may be in **PL**⁵.
- Situation is **also uneven among sectors** and as already seen in 2001, the formal education system continues to receive priority and adult education is an important part of it while little attention is paid to ways of acquiring job skills and informal forms of

² Summary and analysis of the feedback from the candidate countries on the commission's memorandum on LLL / November 2001/ ETF

³ 13 years of VET reforms in the candidate countries / draft presented to the ETF Governing Board 17 June 2003

⁴ As measured in % of GDP devoted to public expenditures in education

⁵ Situation is difficult to assess in Poland since the regionalisation process started in 2000, when PL had public expenditure in education close to the EU average (in % GDP).

learning. This could be partially compensated by measures taken under the umbrella of Ministries of Labour as part of the National Action Plans for Employment following the EU guidelines, but with few exceptions, the country reports didn't demonstrated an in-depth knowledge of things developing in that sector.

- Coordination, linkages and **pathways between formal, non-formal and informal learning are still underdeveloped** as seen with the difficulties to really improve counselling and guidance and in particular to promote cooperation between the different networks, as well as with the very slow progress in developing recognition of prior learning. On the contrary, measures aimed at improving transition from school to work are developing which again demonstrates by contrast the priority given to reforms in the formal system.
- Thus, **coordination between Ministries is still weak** and not any country has yet an integrated policy covering LLL. In most countries, the LLL coordination (or coordinator) set up in 2001 for the consultation process on the memorandum ceased just after the end of the process. Programmes and policies progress in each field depending on priorities set up for each sector. However integrated policies are in preparation and many countries strived to achieve better inter-ministerial coordination through different ways.
- As well, the **involvement of social partners in the definition and implementation of strategies for LLL is still poor**. Although they are involved in many tripartite committees and advisory councils, no significant progress has to be noticed from the reports since 2001 in that field except at local level where it seems easier in some countries to involve social partners representatives in local partnerships.
- Although this progress report exercise was clearly set up by the EC as a follow up of the Resolution on LLL, **references to the Lisbon objectives as well as the EU benchmark in education and training are surprisingly absent in all country reports**. As well very few reports mention activities linked to the Copenhagen process or the follow up programme on the objectives.
- According to the country reports, activities have been particularly intense in the ICT field with **important computer and Internet literacy campaigns** for young and adult population, in the development of **local and regional learning centres**, aimed at making learning closer to home, using schools or other institutions, linked to the **multiplication of local partnerships involving key local actors**. ICT developments are also the main reason of **public private partnerships**. Important activities were also taken to foster access to education in rural areas and for at risk or disadvantaged groups and to develop second-chance opportunities for school leavers.
- On the contrary, there is **little evidence of support to learning at the workplace** by incentives or other approaches, as well as to initiatives aimed at supporting private investment in training. **New funding mechanisms are not developing substantially and very few examples of redirection of funding** are noticed. Teacher training is developing, but the important issues linked to revalorisation of the teaching profession, are still missing in many countries. The counselling and guidance networks still need further improvement and coordination. Finally, **the quality of the VET system still needs very serious improvement** particularly in the three remaining candidate countries⁶, even if many on-going initiatives are about providing better equipment and infrastructure, which keeps a negative image in most countries and contributes to **the lack of motivation for learning in some groups quoted in some country reports**.

⁶ BG, RO, TK.

2. General framework

2.a) legislative and policy framework

- Although most countries demonstrated a **real mobilization towards LLL during recent years**, in particular as a follow up of the consultation process on the memorandum on LLL in Summer 2001 and in relationship with the preparation for implementation of the European Employment guidelines, there is still **no comprehensive strategy for LLL at present** in the acceding and candidate countries.
- Therefore, in most countries, LLL is still progressing without integrated strategy, either through education action plans, national plans for employment, preparation for structural funds or through amendments to the legislative framework. However, **several countries are preparing or have planned preparation of such overall strategy** or concept (in **LT** with the support of Phare 2001, in **HU, MT, CZ, SK** and **BG**). In **EE**, a first draft of the "Project of Lifelong Learning Strategy" has been circulated since beginning 2002 and the project should be finalised by the end of 2003 after a wide consultation.
- Furthermore, most countries strive to implement LLL principles in **different components of the education and training systems through new legislation or most often appropriate amendments to the existing legislation**. Thus, many Acts have been revised or are in the process to be revised with the view to integrating LLL priorities and principles: this is the case with **Education Acts (LT, HU, MT, BG, RO, CZ,)** or more specific Acts covering different components such as **pre-school education (PL), Higher Education (BG, RO, SK,EE⁷), VET (BG, LT, RO, and the Act on financing VET in HU revised in 2000), Adult Education Acts (HU in 2001), Adult training Act (EE in 2003), Further Education Act (SK), VET for adults Act (RO in 2002), the Vocational Qualification Act in EE (2002) aimed at accelerating the development of qualification standards and at providing recognition of prior learning, the Employment Promotion Act in BG (2002), or in PL, the Public Utility and Voluntary Activities Act aimed at fostering non-formal training in the non-profit sector (May 2003).**

Important strategic documents or programmes concerning developments in education were adopted recently: examples are in **CZ** with a Long Term plan for Education, adopted in 2002 as a follow up of a white paper produced in 2001; in **RO** with a strategy for the development of pre-university education in 2001-2004; in **TK** with the Basic Education Programme; in **PL** with the Strategy for the development of higher education till 2010 and the Strategy of continuing education till 2010⁸; in **SK** with the "Millenium project" adopted in 2002 and more recently the document on Further Development of Tertiary Education.

In addition, policy documents aimed at preparing for the Employment European policy and for the Structural Funds make reference to LLL and set up overall frameworks for integrated HRD policies through National Development Plans in general and HRD Sectoral Operational Programmes (**HU, PL, SK**), Single Programming Documents (**LT, EE**), the National Action Plan for employment (**RO,SK**),

⁷ Where the main purpose is to prepare to join the Bologna Process and also to provide recognition of former studies and work experience.

⁸ This document on strategy of continuing education should be approved soon. It comes from the Ministry of education without real involvement neither coordination with the Ministry of labour, which in parallel is preparing a National System of Vocational Education (in fact continuing training).

the Strategic Development Plan set out for the period 1999-2003 and including an integrated HRD strategy in **CY**.

- In the countries where they have been established, **Regions play a role in setting up their priorities** in the general framework set up at Government level: thus, in the **CZ** Regions cooperate with the State in setting up priorities for education and co-financing education and training activities and **HRD Regional councils** have been established; the same in **SK** with the transfer of competences on education and employment to 8 regions and the on-going establishment of Regional Councils for VET ; as well in **SL** with Regional Human Resource councils, in **TK** with regional or districts boards for public education; in **RO** with Local Committees for the development of social partnership in VET, and in **HU** the Development and Training sub-fund as a part allocated to regions according to their priorities and regional centres of excellence were set up as part of the Regional Operational Programmes (in the context of the preparation for Structural Funds). In **PL** regions (voivodship) and districts (powiat) play a major role in setting up education and employment related priorities and coordination with the state is difficult and weak.
- In some countries, local authorities play an important role since they are involved in the financing management of schools, but there is the feeling they have still not been sufficiently involved in the coordination process on LLL (**EE**).

2.b) Inter-ministerial coordination

- These policy and legislative activities referring to LLL remain generally under **supervision of Ministries of Education** in cooperation with Ministries of Labour and other Ministries when appropriate, while HRD policies linked to preparation for Structural Funds are under the main responsibilities of **Ministries of Labour** in coordination with specific **Ministries** (or National Agencies) for **Regional development** and also with Ministries of Economy and Ministry of Education inter alia. Nevertheless, as noted recently in the ETF monographs⁹, inter-ministerial coordination on VET and LLL issues is still a major problem in many countries. This is also reported in some country reports like in the Maltese one, which says, "*With the awaited policy document it is hoped that there will be more synergy between all stake holders*".
- Thus some countries make use of Governmental bodies (the Planning Bureau in **CY**), either they set up specific responsibilities and committees at Prime Minister level (Inter-departmental Committee for Development Policy coordination in **HU**), or they set up specific offices in charge of coordination in HRD (**CZ** set up in 2002 a new Office of Deputy Prime Minister for research and development, human rights and human resources, which serves as an umbrella organization for LLL policies, as well as a Government Council for HRD as a standing body providing advice concerning HRD).
- In addition, **ad-hoc inter-ministerial committees** or working groups are set up when appropriate (**BG, SL, PL**). Finally, regular tripartite committees or expert councils set up close to Ministries of Education and Labour and including representatives of social partners contribute also to coordination work in strategies for HRD, but according to the monographs, coordination under these committees is rather formal. In **EE** the National Council of Adult Education act as an advisory body to the government; it associates 5 Ministries and the largest NGOs under the leadership of the Ministry of Education.

⁹ **Monographs on vocational education and training systems and public and private employment systems.** Prepared by the ETF on request of the EC in order to contributing to the monitoring process of the Joint Assessment Papers on employment policies, they were drafted between 2001 and 2003 depending on the countries. They concern all candidate countries (with the exception of Turkey) and their publication is underway: Lithuania and Slovakia already available.

- In some countries, **special Ministers for ICT** were set up and are now playing a major role in fostering the ICT dimension of LLL policies in cooperation with MoE and/or MoL: Minister for Informatics in **CZ** in 2003, Minister of Information Technology and Investment in **MT**, Minister of Information Society in **SL**.

2.c) Financial framework

- As well as LLL policies, **LLL financing operates under the regular funding mechanisms** set up for the different components of the education and training systems. Recent reforms are in **RO** with decentralization of funding to local councils in 2001-2002, or in **LT** with introduction of new funding mechanism based upon “money follows the learner”. Furthermore, some incentives schemes were put in place in some countries and the training funds operating in **CY** and **HU** were recently redirected towards LL priorities. New financing schemes are also under preparation in **SK** with the view to increasing the involvement of secondary schools and higher education institutions in LLL. Finally Phare grants, World Bank loans or private supports coming from industries such as Microsoft play an important role. In particular it appears that a **considerable amount of Phare funds has been made available for reforms linked to LLL during last years.**

3. Building up partnership

3-a) Local-level partnerships

- Bringing learning closer to home had been during the consultation process on the LLL memorandum one of the most popular messages in all CCs. This is confirmed now with a **variety of initiatives taken with the view to involve local players to promote LLL.**

Some countries set up specific **committees or councils at region or local level** with the view to organize better cooperation between all players and to develop the role of existing schools or universities in LLL programmes (**CZ** with Regional committees for education and employment, **RO** with Local Committees for the development of social partnership in VET, **LT** with Regional Forums, **SK** with Regional Councils for VET), while other countries make use of existing structures, local councils (**MT**), local authorities (**CY**) or Provincial or district boards of public education (**TK**) and also the tripartite committees to the Regional and Local Labour Offices (**SK**). But these initiatives depend on the quality of respective representatives and on the quality of co-operation of Labour Offices with local educational authorities, and they are often braked by the still “*insufficient cooperation between schools and companies*” (**CZ**)

- Other countries set up or continued to develop specialised Centres including **Regional Training Centres** able to act as provider and/or catalyst for LLL schemes: **HU** with Regional Centres of excellence to support the role of Higher Education institutions¹⁰; **LT** with 6 Regional Centres already in place; **EE** with 8 Regional Centres; **CZ** with

¹⁰ In addition, pursuant to the HE Act (1993), it is the obligation of higher education institutions to set up so-called Social Council to involve, on a regular and institutional basis, partners acting in the field of training. The Social Councils include the most-competent representatives, committed to cooperation, of the economic, political, municipal and cultural spheres of the region. These boards monitor and assist the formulation of institutional strategies may initiate the launch of new programmes and the establishment of other forms of cooperation and special working groups.

some initiatives with social partners (see below) or **SL** with Guidance and counselling centres for adult education:

- **GP1.** In Slovenia, **11 local guidance and counselling centres for adult education** have been established during the last three years. Every centre also plays the role of **co-ordination between relevant players in the local environment** (social partners, learning providers on all levels, local authorities, employment services) confirmed by an act signed as part of the opening ceremony of each local centre. It is an opportunity for the providers to gain insight into the needs of participants and interest of relevant stakeholders and to tailor the provision accordingly.

- Furthermore, some countries make use of grant schemes in order to foster such local partnerships (**LT, HU**) or of EU schemes or programmes such as EQUAL (**CZ**) or Phare (**LT**). Sometimes, with the support of local governments, general and vocational schools start to play a role of LLL centres (**EE**).
- Other countries make also use of the decentralized part of the national curricula to develop discussions on the training needs with all relevant players (**SL**).

3-b) Social partnership in LLL

- As stated above (chapter 1), **tripartite committees or councils** were set up in all countries as consultative bodies aimed at giving advice to Governments and/or Ministries on the developments of education and training. They constitute the main basis for social partnership on LLL issues. Thus, social partners are formally involved in policy documents such as National Action Plans for employment, Single programming documents for Structural Funds, Education programmes or strategies.
- In addition, some countries recently set up dedicated bodies aimed at reinforcing investment on LLL components: in **LT** with the **National Education Forum** set up in 2001 following the Dakar World Education Forum; in **HU** with the **National Council for Adult Education** in 2001; in **CZ** Social partners should be involved in activities of the newly established **Government Council for HRD**.
- However, as it was noticed in the conclusions of a **recent conference on LLL and social partnership**¹¹: *“The use of national tripartite structures as a predominant platform for social dialogue in acceding and candidate countries has offered only a **limited potential in terms of promoting in practice the concept of responsibility sharing**. In fact the experience of the transition process in Central and Eastern Europe demonstrates that in most cases governments have kept a leading role in setting the agenda of these structures while the possibilities for social partners to have through them an effective influence on the policy making process have remained rather marginal. This situation should be linked with **the still important deficit in many countries of autonomous social dialogue at sector and plant levels**”*. As well, the **SL** report complains on the lack of *“effective engagement of trade unions”* and the **SK** document reports that *“LLL, as a subject of social dialogue, is not sufficiently developed at the top, as well as at sectoral or enterprise level”*.
- A good example is given in **EE** with the tripartite agreement on Employment signed in 2002 and including the establishment of a working group for developing financing schemes for continuing training. As well **PL** is trying to achieve a substantial involvement of social partners in the preparation of the National System of Vocational Education aimed at providing a conceptual, financial and cooperative framework for the development of continuing training.

¹¹ Conference “Lifelong Development of Competences and Qualifications: roles and responsibilities” 23-24 May 2003 Athens; organised jointly by the ETF, CEDEFOP, the Federation of Greek Industries and the Greek General Confederation of Labour.

GP2. In Poland, the cooperation with social partners may be investigated on the example of Phare 2000 project *National System of Vocational Education*. The Ministry of Labour established the Working Group as a forum for debates on the problems of employees and unemployed training. The representatives of 5 main Employers Organizations and Trade Unions participated in the Working Group. The partners adopted 5 priorities (1) financing the system, (2) development of information and stimulating the quality of training, (3) support instruments for employers (4) support instruments for employees (5) organizational and legal frameworks of the dialogue between the Government and social partners for the development and implementation of the policy of vocational training of employees and unemployed. Till the end of 2003 within the frameworks of Phare 2000 program it is planned to: (1) prepare the analytical overview of solutions applied in 5 EU states, (2) develop elements of Polish model of cooperation between social partners, (3) Prepare a conference and publications concerning the cooperation between social partners in the field of training of employees.

- To be mentioned as well the important role of the Social Partners in **EE** in the consultation process about the Project of LLL strategy :

GP 3: In Estonia, Social partners are also involved in compiling the Project of Lifelong Learning Strategy. The strategy working group includes experts from different educational sectors, also from private and public sector. In the beginning of 2002 working group presented to the Ministry of Education first draft of the Strategy. It was sent for comments to more than 40 organisations - ministries, training institutions, employers' and employee organisations. In the beginning of 2003 the working group started to amend the text of strategy according to the proposals. There has been founded a working group to compile the Strategy of Education. The first version of the strategy has been sent for comments to the expert group, which consists of Estonia's previous ministers of education. The strategy was accepted by the expert group, but some proposals have been made. The Strategy of Education should be finally compiled in the end of 2003. After that the Project of Lifelong Learning Strategy is planned to give to the Minister of Education – and Research to take a stand. The idea is that the Strategy of Education is the document which handles with different spheres of education and it also includes strategies for every sphere (for example the Lifelong Learning Strategy).

- Involvement of social partners in LLL is sometimes **more effective at local level**, in the context of the local partnerships analysed above, in particular through concrete activities such as the following in **CZ**:

GP4. Social partners also take active part in a Phare project entitled **KRAJ** (a Czech acronym standing for Comprehensive Development of Activities of Individuals in the Moravia-Silesia Region), which is being implemented under the patronage of the National Institute for Technical and Vocational Education. The project aims to **establish a regional centre for lifelong learning in the Moravia-Silesia region, which should deliver formally recognized lifelong learning courses** in co-operation with social partners in the development of the respective courses, their evaluation and arrangement for placements of the trainees.

- To be mentioned as well the role played in some countries by important NGOs involved in adult education which associate numerous partners of different spheres, such as ANDRAS¹² and the Estonian Non-formal Adult Education Association in **EE**.

3-c) Participation of education and training establishments

- In general, **participation of education and training institutions is supported by Governments** through regular addresses to heads of schools or universities presidents, but also through specific programmes, often combined with dedicated funding (**CY** with HRDA¹³ support, **HU** through the Development and Training Fund, **LT** through open tendering, **MT**, **CZ** through the Higher Education Institutions Development Fund in particular), and / or Phare and EU programmes funding (Socrates, Leonardo da Vinci) such as in **LT**:

¹² Association of Estonian Adult Educators

¹³ Human Resources Development Authority

IN LITHUANIA, Leonardo da Vinci and Socrates provide wide opportunities for schools, universities and other training institutions to improve the quality and relevance of education and training for all. E.g., the number of schools participating in Socrates programme is annually increasing: **in Comenius programme from 73 schools in 2000 to 121 in 2002**; in Erasmus programme 14 state universities and 8 colleges took part in 2000/2001 academic year, in 2001/2002 this number increased by two private universities; the number of projects of Grundtvig programme expanded from 9 in 2001 to 17 in 2002. On-going Grundtvig projects, like **‘Strategy of motivating adults to learn’, ‘LLL and Gender equality in Europe-a challenge for adult education’, and ‘Guidance, evaluation and methodologies for LLL’** are directly dedicated for the investigation of LLL phenomenon and promotion of LLL.

In Lithuania as well, participation of schools and universities in lifelong learning will be fostered by their involvement in **PHARE Economic and Social Cohesion (ESC) programmes**. E.g., in PHARE 2001 Call for proposals 22 per cent of all applicants comprised educational institutions- universities, colleges, vocational and general education schools.

- Some countries insist on the role of Universities in delivering continuing training programmes (**HU, BG, CZ, LT, MT, TK, PL,EE**), opening structures to part-time students (**SK,EE**), and several set up “third age universities” (for instance **CZ, MT, PL, SL, SK**), as well as Open Universities for adults aimed at offering formal education as well as in service training in a flexible way (**EE** with the Tiger University state programme). This has been reinforced in **EE** with the possibility given by the Universities Act in 2003 to register of previous studies and work experience.
- Other countries insist rather on the use of schools (even primary schools in some countries and also VET schools) **called often to become local learning centres, LLL centres** or non-formal education centres, and other training centres aimed at proposing LLL and in particular ICT courses or other specific activities such as support to parents in **MT**. In this context, schools start to be opened beyond the “normal” schooling time:

GP5. In Turkey, In order to provide education for more people by making use of the buildings, facilities, equipment and personnel of vocational and technical education schools, institutions are open between 7 am-12 pm including weekends, mid-term and summer vacations in accordance with the “Full Day-Full Year Education” implementation. Within the context of these implementations, taking into consideration the interests, demands and skills of individuals, provides all types of long and short-term certificate/diploma programs.

- Participation in education and training has also benefited in most countries of important development of private schools and training centres for youth and adults (**EE, SK**, but also **HU, CZ, PL**). As a consequence, there is a lack of transparency and in particular, as mentioned in **EE**, a lack of database on learning opportunities.

4. Insight into the demand for learning.

4-a) Access to basic skills for all citizens¹⁴

- This priority has been taken by all countries through **a variety of policies and measures aimed at facilitating access, mainly in the formal education system**. **The first** concern infrastructures, through expanding the education and training system (see above 2-c), modernizing schools and other training centres, equipping

¹⁴ Answers from countries cover either the message “for all” or the message “basic skills” and rarely the complete message. Therefore, the document reflects this diversified approach, though it could have been arguable to analyse the first kind of answers under the chapter on access.

them with ICT and Internet facilities. Furthermore, **LT** developed in 2000 the “**yellow bus**” project facilitating transportation of schoolchildren especially in rural areas; **HU** started a programme of refurbishment schools and in particular VET schools including particular focus on dormitories:

GP6. In Hungary, a “**Development Programme**” has been made for vocational schools). It will be implemented in the period between 2003 and 2006 and will include 20-25 percent of schools performing vocational training (approximately 90-100 schools). Learning materials and methodological reference materials to be developed, as part of the programme will be accessible for every school. The total budget of the programme to be completed by 2006), to be covered in part from the central budget and in part from the Fund for Vocational Training

- **The second** is about general measures concerning **the age, the duration and the organisation of schooling**, with **RO** increasing compulsory education from 8 to 10 years starting at 6 instead of 7 and **TK** thinking to similar increases and with **PL** making compulsory one year preschool attendance at 6 after having increased compulsory education until 18. Interesting is the initiative taken in **EE** in 2002 in general secondary schools and expanded in 2003 to VET schools to introduce the possibility for adults to learn by subject instead of by class and therefore, to choose the length of the studies, beyond the normal 3 years.
- **The third** refers to **curricula reforms with the introduction of basic and core skills**, in particular for VET curricula, and the use of the decentralized part of the national curricula to adapt to specific local needs (**HU**). This reform process is ongoing in all countries, but still far to be completed according to the monographs reports. It still faces difficulties when setting up appropriate structures (in **SK** with the National Curricular Council which was still to be set up by the end of 2002) and needs an important effort in teachers training (mentioned in **SL**) and specific adaptation for adult training (**RO**). **Modularisation of curricula** is also mentioned as a condition to facilitate access, in particular to receive lower level qualifications (**HU, RO**). Finally, greater autonomy given to schools in the management of additional budget encourages schools to take more responsibility in developing pupil’s knowledge and skills (**PL**).
- **The fourth** concerns the specific focus given to some **target groups**: the youngest with the generalization of kindergarten (**RO**); the early school leavers and drop outs with **second chance schools** (**CY, LT, MT, HU**), or special classes for slow learners (**MT**) or **specific training given to teachers** working with these pupils (**SL**), or with **apprentice schemes** (**CY**) as another opportunity to acquire relevant qualification and also through **folk universities** (**SL**); the children with special needs (**LT**) and the disabled in tertiary education (**SK**), the low skilled adult population (for whom second chance, evening classes and other special classes at school are available in most countries), particularly in rural areas (with special Farmers training centres in **CY**); the Roma children in **SK** with the creation of a “Zero grade school” aimed at preparing integration of Roma children in basic education and of 240 Roma teacher assistants in schools with the role of facilitating this policy; and the unemployed with the limited sets of active labour market measures¹⁵. In **TK**, a special project was launched in 1997 (and completed in 2000) on the **Education of Girls and Women**.
- **The fifth is about basic skills themselves: focus was in general on basic literacy and numeracy** (**MT, SL, RO**) but also on **computer literacy** (**TK, SL, MT, HU, PL**,

¹⁵ Linked to the limited funding available from the employment funds in most acceding and candidate countries (see the ETF monographs).

EE), on **entrepreneurship (TK, LT, PL)** and on **foreign languages (SL, TK, PL)** with an interesting initiative foreseen in **HU**:

GP7. In Hungary, the Ministry of Education intends to ensure that each student learns at least one foreign language, therefore, as part of the amendment to the Act on Education, it intends to ensure, as of 2004, **the introduction of a preparatory class in grade 9 of each general secondary and vocational secondary school, where the student wishing to attend such classes can learn foreign languages in at least 40 percent of the available time frame.**

4-b) Developing ICT skills

- All countries set up **specific policies aimed at introducing ICT and developing ICT skills** as one of their major priorities. As a result, ICT equipment and Internet access at school increased considerably in all countries, even if the ratio of students by computer is still not comparable to the EU average in most countries. Particular examples are given with the creation of dedicated Ministries (**CZ, MT, SL**), with special budget allocated to ICT developments (**PL**), with Governmental programmes like in **EE** with the "Tiger Leap" project and since 2001 the "Tiger Leap Plus" programme, in **SK** with the INFOVEK and the Slovak Telecom projects, and in **TK** stating "*eLearning will be put into force at every level of formal and non-formal education*", with the National Strategy for the implementation of an Information Technology Society (**RO**) or with the National Information Society Development Concept adopted in 2001 in **LT** with much work at Government and Parliament level:

GP8 In Estonia, Tiger Leap helps to provide teachers with elementary computer skills and guides them to use the opportunities offered by information technologies, supports curriculum development, encourages creation of original software on the Estonian language, supports schools in establishment of Internet connection. Tiger Leap Foundation was created in 1997. From 1997 to 2000 the Foundation administered financial resources allocated to the Program from the national budget. In the year 2000, Estonian schools were furnished with means of information and communication technology to the following extent: 25 pupils per computer on the average (there are no upper secondary schools nor basic schools without computers), 75% of all the schools got online Internet connections and remaining schools have dial-up option. In 2001 the Tiger Leap Plus program was approved by the session of Estonian Government. It focuses on support for ICT development general education and teachers training. Implementation of the development plan will help to great preconditions in all the schools for the use of ICT means as integral part of the learning process.

GP9. In February 2001, the Lithuanian Government approved the **National Information Society Development Concept, where** the major priority is strengthening of the ICT competency of the Lithuanian population. As part of the **School Library Concept** approved in 2001: the future of school libraries is seen as of an open learning and information centres with multi-media facilities which should ensure the access to information for all stratum of the society. The Programme of Renovation and Modernization of Libraries in 2003-2013 was approved by the Government in September 2002. A PARLIAMENTARY RESOLUTION FROM 2001 PROPOSES TO INTRODUCE COMPUTER LITERACY AS A REQUIREMENT AT SCHOOLS OF GENERAL EDUCATION AND TO INCLUDE THE COMPUTER LITERACY EXAM INTO THE CURRICULUM STARTING FROM 2003.

- Therefore, the aim is to introducing ICT skills for all (**CZ, LT, HU, BG, MT**), and to use schools and other local training centres as the vehicles for such ICT literacy activities often organized in reference to the **ECDL (LT, MT, EE)** and other more advanced certificates. As an example in **SL**:

GP10. In Slovenia, the Ministries of Education and of Information Society have jointly established a network of presently **21 e-schools as centres of ICT learning** in local environments). The involvement of local

communities in providing the necessary workforce for the functioning of these centres is rewarded by investment in hardware and Internet facilities. They are designed to provide the population that is not able to access ICT from home to acquire the basic skills in this area and effectively use the technology and thus prevent the creation of the digital divide. The e-schools also provide opportunity for **intergenerational learning** – passing of knowledge and skills from the younger to the older generation in this particular case.

- This supposed dedicated action plans (**all countries**), often concerning specific target groups (unemployed from industries affected by restructuring in **SL**, adult women in **LT**, teachers and trainers in **CZ** and **CY**, rural populations in **CZ** and **EE**), and also important efforts for continuing to equip schools and training centres. As examples, under the “SuliNet Expressz” in **HU**, every school will have access to Internet by 2005; **LT** will set up one computer for 10 pupils at every school by 2004; these endeavours are supported by state funding, but also by other grants coming from **Phare, the UNDP, the eEurope initiative and also private contributions** (Microsoft in **LT** for instance) and Foundations (Soros in particular). In **EE**, Internet is also used as a tool for improving the quality of life for Estonian residents through the “Look @World” project::

GP11 To support the use of Internet and improving the quality of life of the Estonian residents and the competitive power of the state in Europe the project Look@World (Vaata maailma) was created. The project was initiated by the private sector, but it found partners also in governmental and non-governmental sectors. The project provides learners free of charge Internet education (8 hours block) the participants of the project get an opportunity to use web-based public services offered by the state and local municipalities and other Internet-based facilities. By now the project has offered training for more than 60 000 inhabitants of Estonia.

- As part of these plans, **Distance Education** is also receiving support including Phare funding, in particular through the ESC Phare programmes.
- In general, ICT literacy programmes met the needs of large groups of the population and receive an “immense popularity” (**MT**). However, there is the need to differentiate between computer literacy and the much more ambitious attempts to use ICT and Internet as a tool to learn other subjects than computers. Thus, ICT developments are still slow in some countries due to the limited number of private initiatives and the lack of adequate resources in schools (**SK**). As well, as seen in the monographs reports, success is not always guaranteed as most teachers are in general not well trained, Universities are also starting to develop appropriate training programmes and many of the teachers are therefore reluctant to change their way of teaching.

4-c) Promotion of learning at the workplace

- As we know since publication of the CVTS2 study by Eurostat, **training for employees at the work place is developing but at a significant lower level than the one observed in the EU in most of the acceding and candidate countries.** ETF monographs confirm this analyse concluding that most employers don't consider training as an investment. However, as stated during the Athens conference on Lifelong development of competences and qualifications (see above), development of training for employees and particularly at the workplace is often seen as a crucial need: In particular, ***“Firms have a major role in creating an appropriate learning environment at the workplace by making competence development a constituent part of their human resource and business strategies. Firms can equally contribute to preserving and improving the employability of their staff notably by facilitating access to competence development opportunities for all employees. Public authorities and social partners are well placed to develop policy frameworks with the aim to stimulate, through suitable mechanisms and tools (e.g. co-investment approaches, schemes to validate competences acquired through professional experience, etc.), a higher and more efficient investment in skills and qualifications as well as to promote a***

more equitable access to learning opportunities for all (workers in SMEs, older workers, low-skilled, temporary staff)”.

- Thus, relevant measures must be done at company level, but it's **also up to governmental authorities to contribute to the setting up of an adequate framework**. In this respect, **few initiatives** have to be mentioned: in **HU**, the Adult Education Act (2001) provides consumer protection to those participating in training at the workplace, and contributes to ensuring transparency and quality in the CVT system through the establishment of dedicated institutions (Accreditation Board and National Institute for Adult Training); in **CY**, under the Training Support Scheme supported by the HRDA, technical and financial support is given to enterprises for the design and implementation of initial and continuing VET; in **EE**, according to the Adult Education Act (1993), study leave is granted for the employees who wish to participate in training (at least 30 days per year for formal education and 7 days for non-formal learning); in **PL**, where tax incentives already exist, the best tools and approaches to develop training in companies are under discussion as part of the working group set up in the context of the Phare project concerning the National System of Vocational Training ¹⁶; however, some initiatives were already launched such as :

GP12. In Poland, a program “Investor in Human Resources” is run under the auspices of the MELSP. **The firms, which invest in human resources, are awarded a special prize.** Every year an emblem “Investor in Human Resources” is awarded to approx. 40 firms, including large, worldwide consortiums, as well as small Polish firms. The enterprises, which were awarded this emblem, may compete for the title: Leader in Human Resources Management, A competition organized by the Institute of Labour and Social Policy. 3rd edition of the competition Leader in Human Resources Management took place in 2002. 14 firms were awarded this title. The President of the Republic of Poland overtook the patronage of honour over this competition in 2003.

- References to in-service training have been also introduced in the **Labour Code** in several countries and recently in **LT** (2002) where it's proposed that the time spent in training be considered as working time, and **TK** shows an interesting initiative:

GP13. In Turkey, it was agreed to establish **educational units at the enterprises** with the Law no 4702 put in force on July 10, 2001. Not only in-service training of the employees but also the skill development education of vocational education students have been ensured by establishing educational units at enterprises which employ “20 or more staff “.

- **Incentives for individuals** are also a way to promote training for employees. **SL** mentions the recent adoption of tax relieve for persons investing in learning and knowledge in addition to a voucher system aimed at giving opportunities to achieve a higher degree of formal education and/or to undertake learning languages.
- Moreover, some countries mentioned specific arrangements for civil servants aimed at providing or facilitating training (**MT, BG, TK, CY**).
- In addition, some country reports understood workplace training also as practical training for students, or apprenticeship training (**MT, BG, SL**), by expressing an interest to develop such training in combination with school attendance.

4-d) Incentives to help companies particularly SMEs

¹⁶ See above under 3.b). In this working group, The discussion concentrated on such instruments as: Enterprise Training Fund, Enterprise or out – of Enterprise Training Plans, longer individual training leaves for employees, replacement of an employee who undergoes a training, documentation of professional qualifications, certificate “Investor in Human Resources”, a collection of, recommended by the state, training modules, a collection of standard professional qualifications.

- Following the conclusions above on the under-development of training at the workplace, the Athens conference reinforced the conclusions by emphasizing the lack of adequate resources for the training of employees, at state level but also at company and individual level: **“Attracting companies and individuals towards investing in lifelong learning remains a difficulty in most countries due to lack of interest (older employees), lack of free time (self-employed) or resources (Sme’s)”**.
- Nevertheless, Training Funds are available for supporting workplace training in few countries, **HU** with the Development and Training Fund, **CY** with the HRDA:

GP 14. In Cyprus, the national agency responsible for vocational training, the **Human Resource Development Authority**, in 2002, has completed the revision of its schemes and funding policy based on the *State Aid Law*, and the *Regulation on Vocational Training*, which are based on *Commission Regulation 68/2001*. For every scheme, the authority sets aid intensities for SMEs and for large enterprises, for both general and specific training, and eligible expenses in full compliance with the Training Regulations.

In the revised schemes, which came into force in **January 2003**, **particular emphasis is placed on SMEs**. Learning in SMEs typically takes place in a non-formal (and often on informal) context and is largely dependent on employers' attitude to promoting learning. HRDA's objective is to facilitate learning in SMEs. Particular **emphasis is placed on new technology and ICT-based learning**. In this context the authority provides additional incentives to SMEs for implementing lifelong learning. SMEs now receive grants covering up to 75% of eligible training costs, while large enterprises receive up to 55% of eligible training costs. Also, trainee costs are now included in the calculation of eligible expenses for funding in-company training, which provides additional incentives for organizing staff training.

- In other countries incentives are under discussion but face difficulties to be set up. Thus the proposal to introduce a 1% levy on the company payroll to finance further training, which was included in the draft amendment of the Act on Further Education, was finally dropped by the government in **SK**.
- However, Ministries of Economy and/or National Agencies contribute to the development of small businesses (**MT, TK, LT**), by supporting the development of business information centres or business incubators but also through tax exemptions aimed at promoting training (**TK**) and specific initiatives such as Enterprise Estonia in **EE**, which provides financing products, counselling, cooperation opportunities and training for entrepreneurs, and support training project for employees as part of the national support system for entrepreneurship.
- Just in 2003, **HU** expanded its support to adult training by introducing a **personal income tax benefit**, aimed at adult education:

GP 15. In Hungary, such benefits are due to any private person participating in adult education, his/her spouse, parent (adoptive, step- and foster parents also included), grandparent, sister or brother indicated as payer on the certificate issued by the accredited institution of adult education. **The amount of tax-reducing support is 30 percent of the training fees** (fees of examinations included) paid in the given tax year but its maximum limit, including the tax allowance for the sum spent on IT equipment, is HUF 60,000 (245 €) per tax year.

- Finally, Labour Offices play also a role in supporting SMEs according to the National Action Plans for employment, as well as a number of Phare ESC programmes.

4-e) Recent measures to support the role of learning facilitators.

- According to the monographs, the poor situation of teachers, concerning their status, salaries, careers and training facilities were seen as one of the weakest points in the education system in most countries¹⁷. However, although important endeavour was on

¹⁷ Picture is diverse according to countries: for instance teachers' salaries were relatively at the same level as in the EU in CY, MT and TK when they were markedly below in other countries.

teacher training, still many country reports don't demonstrate that this priority received sufficient resources and attention yet.

- However, in **HU**, measures were taken to increase attractiveness of the profession, in particular through a one-off 50 percent salary rise; but no other country mentions such upgrading. In **PL**, as part of a decision taken in 2000, teachers' remuneration and professional promotion were upgraded on the basis of a differentiation introduced among four categories:

GP 16. In Poland, from May 2001 to May 2003 the implementation of the system of professional promotion of teachers in the education system (level 0-4 ISCED) connected with the reform of their remunerations, introduced by the Act from February 2000, will be continued. The adopted solutions subjected the amount of teacher remuneration to teacher's qualifications, invention and consequences in in – service training. 4 levels of professional promotion were set up: (1) teacher - trainee, (2) contract teacher, (3) appointed teacher, (4) chartered teacher, (5) for specific achievements – the title of professor of honour of education. The basis for the promotion is to make **an apprenticeship concluded by a positive assessment of professional teaching achievements** and moreover obtaining the acceptance of the Qualification Commission or passing an exam before the Examination Commission. Within the period of the apprenticeship for the higher level of promotion a teacher is obliged to deepen his/her knowledge and skills aiming to personal development and the improvement of the level of schoolwork. The adopted system regulations encourage teachers to improve their performance, innovations and personal development. The considerable increase of their performance has been noted. In the period from January 2000 to February 2003, 100.623 teachers submitted their applications for the professional promotion. The introduction of the professional promotion was connected with the determination of state guaranteed average salaries. The relation between the amount of average remuneration on given levels of professional and the basic amount of average remuneration in the state budgetary sphere were as follows: January 200 [chartered teacher – 150%; appointed teacher – 145%; contract teacher – 121% teacher-trainee – 82%]; October 2002 [chartered teacher – 225%; appointed teacher – 175%; contract teacher – 125% teacher-trainee – 82%].

- In most countries, **in-service training has been reinforced (CY, CZ, LT, MT, HU, BG, SL, PL)**, as part of activities undertaken by the Ministries of education and/or national agencies for education. Sometimes it was made compulsory like in **PL** where each school is obliged since January 2002 to allocate funds for finance in-service teacher training in the amount of 1% of their annual financial resources, or encouraged by specific incentives concerning career advancement (**HU**), or by a measure in **EE** where the training of teachers can't amount less than 3% of their yearly salary fund. . In **SK**, educational vouchers for in-service training are under discussion at the Ministry of Education.

GP 17. In Hungary, the Act on Public Education provides that teachers should participate in in-service training at least once every seven years. The successful completion by a teacher of a training course should be recognized by a one-off material allowance provided once every seven years, namely, by reducing with one year the period before an automatic advancement in salary class. The State covers 80 percent of the training costs from the amount ensured for this purpose in the Act on the Central Budget. Upon the fulfilment of certain conditions, the State covers 100 percent of the costs of training. The Decree on the in-service training of teachers, as amended, included the continuing training of teachers in the framework of Act CI on Adult Education. By doing so, it included in-service training courses for teachers in the registry of institutions of adult training, regulated by a decree issued by the Ministry of Education. As a result of the amendment of the law, the in-service further training of teachers has become part of the Hungarian system of lifelong learning.

- In other countries, teacher training benefited from the decentralization of the training services closer to schools (**LT, CZ**) and from the role played by NGOs such as ANDRAS¹⁸ in **EE**. However, there is no evidence of a systematic in-service teacher training system except in **SL** and since the law on Adult education in **HU**.

¹⁸ Association of Estonian Adult Educators

- Nevertheless, there are attempts in some countries to set up adequate standards for teacher training and to cooperate with universities in that context: **LT** gives an interesting example where a new updated concept for Vocational Teacher/Lecturer was adopted in 2002¹⁹:

In Lithuania, conception for Vocational Teacher/Lecturer in Education and Training and a Professional Standard for Vocational Teacher/Lecturer were prepared in 2002. The initial training of vocational teachers has started in Vytautas Magnus University since the academic year 2002-2003.

- Finally, several initiatives were launched in the context of EU programmes, Phare, Leonardo da Vinci, Socrates, Grundtvig in most countries. **BG** made use of a Phare project "Improving Vocational Education and Training" to ensure further qualification of teachers in a specific component, as well as a Leonardo da Vinci project for "Promotion of continuous qualification improvement for vocational schools' teachers".
- Three countries mention specific training schemes for adult education trainers: **MT**, **LT** and **SL**.

5. Adequate resourcing

5.a) Target for investment in human resources

- Except in **CZ** where a Policy Statement issued by the Government and the Long Term Plan for Education both adopted in 2002 set out the aim of increasing public expenditure on education to 6% of the GDP by 2006 and in **SK** where the National Programme of Upbringing and Education in the SR for the next 15-20 years sets the same quantitative priority (i.e. increasing the State budget for education and training to a minimum of 6% of the GDP), **there is no global target on investment in LLL in other countries**. However, the Integrated LLL strategies to come in several countries should include such targets (**MT**).
- **SL** set up specific targets related to different LLL components (ICT, education buildings and equipments, support to less advantaged students, subsidies for transport, adult education) as part of a 2002 law on increasing investment in education and research
- In general, acceding and candidate countries preferred to set up general objectives related to outputs such as education attainment and/or participation in LLL. It is done through qualitative statements as part of the policy documents mentioned above. And these statements are often supported by budgetary commitments including sometimes references to the structural Funds (**HU**).
- However, some countries set up also quantitative targets, but **without reference to the EU benchmarks, neither to 2010**: thus **LT** has targeted for 2012 that *no less than 95% schoolchildren acquire basic education, the share of early school leavers/drop outs don't exceed 9%, more than 80% of the 25-29 years gain at least secondary education and no less than 85% of working age population have real access to ICT and ICT skills*. **PL** has targets coming from the JAP process, although they were not mentioned in the report²⁰ As well **TK** has schooling targets as part of its 8th Five Year Development Plan ending in 2005; *25% at pre-school education, 100% at primary education, 75% at secondary education and 37.3% at Higher education*.

¹⁹ This project had been supported by the EU in particular by the ETF and Leonardo da Vinci.

²⁰ % of the 25-64 participating in education and training from 3.8 in 2002 to 18-20 in 2006; or % of the 25-30 with university education from 16 in 2002 to 18-23 in 2006.

- Other countries set up specific goals: **CY** has the goal to become a regional reference for LLL through investment at all levels and particular support to the establishment of two new public universities.

5.b) New or re-directed funding

- In general, countries refer to **budgetary increases**²¹ for different areas of the education and training systems (**CZ, HU, TK, CY, PL**). Some state explicitly **new funding** such as **LT** for pre-school education, the setting up of social teachers and the State Distance Education programme; **HU** with the financing of plan for the “Development of the Education Infrastructure” through funds allocated to the HRD OP and with some programmes supported by Phare (“School of the 21st century” giving special emphasis on ICT); **BG** with some LLL projects supported by Phare (Renovating institutions for VET, LLL and VET, and Professional Qualification); **MT** with the initiative “Let Me Learn” concerning slow learners; **TK** with funds allocated to pre-school and primary education and also to non-formal education as part of the 2003 budget; **EE** with the support given from the state budget to non-formal adult education institutions by supporting the salaries of the manager and up to three teachers, as part of the 2003 Adult Training Act.
- **Redirecting funding** is mentioned in **SL**, with funds from the National Budget in 2002 and 2003 redirected to the objective of increasing participation of adults in formal education, and the tax incentive for individuals undertaking training; in **LT** with more funds allocated to quality in education and to the yellow bus programme (with the support of the World Bank); in **CY** with the HRDA re-directing funding towards learning in SMEs; in **HU** with a greater part of the Development and Training Fund allocated to employees training; in **PL** with the teachers’ remuneration and career upgrading (see above). And in **SK**, the massive introduction of preparatory “zero classes” to facilitate integration in basic education for socially disadvantaged pupils (predominantly Roma) should cause important reallocation of funding in the future. Although not mentioned in the reports, we should also consider as “redirecting funding” related operations, **the optimisation processes of the school networks** undertaken in most countries, but at a slow pace.
- It is clear from this analysis that redirecting funding is easier in the countries that invest most in education or in countries that already have set up training funds (**HU, CY**). Thus it isn’t surprising to see **LT, SL** and **CY** in this list knowing their public expenditure in education as percentage of the GDP reaching 6 in **LT**, 5.6 in **SL** and 5.9 in **CY** (EU average 5).. It is also interesting to see the **considerable and probably increasing contribution of Phare** funds in LLL related reforms and projects during last years.

5.c) Initiatives to stimulate private investment in education.

- With the exception of **CY**, where the Human Resource Development Authority engages private investment by co-financing training activities and projects initiated by enterprises and private training institutions, and at a lesser extent **HU** through the Development and Training fund which devotes the major part of its subsidies to VET schools, and **TK** which introduced tax exemption for private initiatives aimed at setting up universities and more recently schools, there is **no real global policy aimed at stimulating private investment in education and public-private cooperation in**

²¹ This will have to be confirmed by international measurement as the last statistics provided by Eurostat and the monographs showed on the contrary a stagnation or decrease in public expenses except for Cyprus, Lithuania and Bulgaria;

education is rather ad-hoc. (As well **RO** foresees a tax exemption for authorised providers as part of the 2002 law on adult education).

- However, some countries support private operators when they run public education institutions through normative budget support (**HU, SL**), subsidies given to individuals through a “voucher system” (**SL**); other mention the support given to private training institutions through the accreditation processes (**CY**), or the support to private companies through the purchase of ICT hardware and software (**MT, SL**
- Thus, as stated in the conclusions of the Athens conference, “*Public authorities and social partners are well placed to develop policy frameworks with the aim to stimulate, through suitable mechanisms and tools (e.g. co-investment approaches, schemes to validate competences acquired through professional experience, etc.), a higher and more efficient investment in skills and qualifications as well as to promote a more equitable access to learning opportunities for all (workers in SMEs, older workers, low-skilled, temporary staff)*”. Thus at present, as analysed above, the weak involvement of Social Partners in education and training at national level in most countries is a considerable obstacle for any policy aimed at stimulating private investment in education and private-public partnerships.

5.d) Examples of private-public partnerships in LLL

- In total, **ICT** is probably the sector where public/private partnership progressed the quickest. It covers ICT courses available to the general public in private schools through the support of the Ministry of Information Technology and Investment in **MT**, or the support of the Ministry of informatics for the development of ICT literacy for adults in rural areas in **CZ**, the cooperation between public and private funding when equipping schools in **SL, LT, TK**, in delivering ICT courses in **CY** or in developing Internet access facilities to a large audience through the Look @ World project in **EE**. Moreover, a global partnership is in preparation in **MT** with Microsoft:

GP 18. In Malta, Microsoft Corporation and the Malta Government are in the process of setting up a PPP (private public partnership) with a number of aims including: the latest technological expertise to be made available; an Academy to promote excellence in IT; an extensive training and development program.

- Another example is given in **LT** with the “Window to the future” project, developed in cooperation among local and central governments, telecommunication companies, IT companies and banks with the view to develop Internet through public access points disseminated in the country. Through a network of 100 centres mainly based upon libraries and cultural centres, the project aims at providing 300,000 citizens with Internet basic skills by 2005.
- Other examples of ad-hoc public-private partnership are given in **CZ** with the KRAJ project setting up a LLL regional centre (see above), in **SL** with the first inter-company VET centre set up in 2002 with state and private funding, in **CY** with cooperation between public and private universities in organizing special seminars and other courses, in **TK** with private donations for school constructions, in **HU** for the future construction of dormitories and other higher education investments.
- Other prominent initiatives come from **LT** with the support of the Soros Foundation:

GP 19. IN LITHUANIA, ONE OF THE MOST OVERWHELMING EXAMPLES OF PRIVATE-PUBLIC PARTNERSHIPS (PPP) IN THE FIELD OF LIFELONG EDUCATION AND TRAINING IS THE ACTIVITY OF THE **OPEN SOCIETY FUND-LITHUANIA**

(OSFL) SET UP BY THE G. SOROS FOUNDATION WITH CLOSE COOPERATION WITH THE MoES. FROM 1991 TO 2003 OSFL DEDICATED ALMOST 18,5 MLN. USD FOR SCIENCE AND EDUCATION PROJECTS. ONE OF THE LAST PROGRAMMES IMPLEMENTED IN 2002 BY THE OSF WAS MAINLY DEDICATED TO THE LIFELONG LEARNING IMPLEMENTATION, E.G. '**LLL OPPORTUNITIES IN UTENA REGION**', 'DRAFTING OF THE REGIONAL EDUCATION STRATEGY IN KAISHIADORIAI REGION'. A FOUNDATION FOR EDUCATIONAL CHANGE ESTABLISHED BY THE OSFL IN 1999 IS TAKING ACTIVITIES IN DEVELOPMENT OF THE EDUCATION REFORM; MODERNIZATION OF THE EDUCATION PROCESSES AND CURRICULA; IMPLEMENTATION OF VARIOUS PROGRAMMES (*SUPPORT TO LITHUANIAN ROMA CHILDREN; SCHOOL IN A MULTICULTURAL COMMUNITY; DEVELOPMENT OF PRE-SCHOOL EDUCATION; WORK WITH CHILDREN WITH SPECIAL NEEDS IN AN INTEGRATED CLASS*) IN SCHOOLS TO ENSURE EQUAL OPPORTUNITIES AND ETC.

GP 20: In Slovakia an example of the successful public-private co-operation is the activity initiated and financed by the Guild of Motor Vehicles Dealers and Services (GMVDS) aimed at the reform of VET in related branches. In March 2002, the guild invited all key players to create a steering committee and a special taskforce meeting on regular basis.

The first visible step was setting job and graduate profiles based on international experience. The guild paid for visiting relevant countries, e.g. Germany, France, the Czech Republic and Hungary, and studying experiences. Curricula renewal process in co-operation with State Institute of Vocational Education and Training started in October 2002. There were more than 40 teachers identified to review the old curricula and to meet standards set by the guild. Since January 2003 a group of experts concentrated on preparing "basic educational documents (BED)"- formal and administrative expression of the curricular reform. Consequently, the Ministry of Education approved new BEDs for three ISCED 3C training branches coming in force since the school year 2003/2004. The fourth ISCED 3C training branches as well as three post-secondary two-year ISCED 4 programmes are in the process of approval. Out of the existing 124 schools the guild has selected 12 schools according to the strictly regulated selection process based on the list of over 100 criteria. These 12 schools spread all over the country will create a special network serving the guild. The schools will be equipped according to the specially elaborated normative, co-financed by the guild, higher territorial units, and hopefully European projects the guild has started to prepare. In one of these schools a training centre for educators will be set. Six new textbooks are in the process of preparation.

6. Facilitating access to learning opportunities.

6.a) Measures to remove barriers to learning

- Country reports **don't express heavy concerns towards inequalities in education and training** as many of them indicate having created good conditions to remove the most important barriers to learning. Indeed, as reported by Eurostat, acceding countries have markedly lower early school leavers rates than the EU (which is not true for the three remaining candidate countries²²) which could be seen interpreted as less barriers to initial education opportunities. However, as analysed in the monographs reports, situation for unemployed and adult population in general is less promising and the lack of appropriate public funds for active labour market measures in most countries prevent them to fight efficiently against barriers to training and learning and to reduce social exclusion which concerns in particular the Roma population and the long-term unemployed. As well, some countries (**BG, RO** for instance) have still entrance exams at the beginning of some upper secondary education routes, and in general systems are still not very flexible. In addition, as mentioned in the **SK** report, there are social barriers hampering Roma minority to access quality education as they are often directed into the Special schools for disabled. Recent policies such as the introduction of preparatory "zero classes" and employment of assistant teachers of Roma origin are aimed at counteracting these phenomena.

²² BG, RO, TK

- Thus, country reports mention as remaining barriers **the lack of motivation for learning on the part of some unemployed and elderly citizens (CZ, SL, EE)**, but also the **lack of learning opportunities for youth and adult population in rural areas (TK, CY)**, the **transportation issues (LT)**, the difficult access to **education for girls (TK)**, and for the ageing population (LT), the costs of access to Higher Education (HU, PL) and to adult training opportunities in the private sector (EE), and the access issues for the disabled and the disadvantaged people.

As the main measures taken to improve access, many countries refer to the **modernization of the education and training systems**, including introduction of National Qualification standards, allowing for recognition of prior learning, promoting transparency, introducing modular approaches (HU, BG, RO, TK)

In Bulgaria, the MES is an active participant in the elaboration of the **International Francophone Agency project on development of the VET in the Central and Eastern European countries**. Standards for acquisition of professional qualification and pilot introduction of bilingual training by professions are in a process of development. The expected results are related to **recognition of professional qualifications in the European countries**.

- Others insist on the extending access to the formal system through evening courses, part time courses and distance education with important initiatives in some countries such as **HU, TK, LT, EE and CY**:

GP 21. In Cyprus, the establishment of an Open University is an important innovation. The Open University will be an institution of distance learning and it will be **open to all citizens of Cyprus and abroad**. There will be no other entry requirements apart from a school leaving certificate for undergraduate courses and the tutors will be available to offer help and guide the students through the learning process. Students will be able to work on their own study pace.

GP 22. In Hungary, the first steps towards elaborating e-learning programmes in adult professional training have been also made. **e-learning programmes regarding remedial or catch-up courses** are being developed in the fields of mother tongue and communication, mathematics, physics, chemistry and biology. The e-learning module of **“Behaviour and communication in community education”** assists preparation for adult age learning. In terms of selecting professional modules, the experts directing the elaboration of the e-programme expressed as a goal that in the first phase of elaboration, so-called common modules should be developed that can be utilized while mastering several specific professions.

- Other relevant policies include the development and the modernization of the counselling and career guidance networks (LT, RO, SL), with motivation courses provided particularly for unemployed (CZ), adequate transportation to schools (LT), specific centres in rural areas (TK, CY), loans schemes and scholarships for students entering higher education (HU, PL), and the development of private (non-state) higher education institutions in small and medium cities without state universities, offering alternative and cheaper solutions for “students from not very rich families”.
- Moreover, specific programmes and/or policies addressing specific groups are analysed below (5.b) and some references are made at this stage. They refer to elderly people (in LT with the 55+ programme), girls (in TK with Vocational High Schools for girls), disabled (BG), disadvantaged (LT) and prisoners (EE).
- As a tool to increase motivation for learning, **SL** set up a LLL week:

GP 23. In Slovenia, a week of lifelong learning funded and supported by the government has developed into a **festival of lifelong learning**, in some environments covering the whole month of October and central events with high representatives of the Government taking part. **Extensive coverage by media** contributes to motivation for learning, spreading information about learning opportunities and to general awareness of the

importance of lifelong learning among all stakeholders (decision-makers at all levels, enterprises, individuals, learning providers).

6.b) Groups at special risk of exclusion.

- Important priority is now given at government level to **Roma population** in all countries concerned²³. National policies have been set up at the end of the 90s. With a considerable support of Phare and other donors (in particular the Soros Foundation) national programmes have been launched by Ministries of Labour and Social affairs with the view to ensuring employment and social integration (in **BG** with the National programme “From social care to employment”, in **LT** with the Programme for increasing employment 2001-2004 with a special component for job training and employment of the Roma adults and in **RO**, and in **SK** with the “zero classes” and the assistant teachers of Roma origin).
- During last years, actions were developed as well in the field of education with projects such as the Roma plan on better integration and participation in education, introducing in particular quota in upper-secondary and higher education and also special training for teachers (**RO**); on Basic schools providing a full day programme for socially and culturally disadvantaged children, on Multi-cultural education and support for Roma integration, and a Programme for Roma community integration in **CZ** since 2002. These programmes were based upon a Strategy set up in 2001:

GP 24. In 2001 the Ministry of Education, Youth and Sports worked out a policy document **Strategy for Improving the Education of Roma Children** in which it defined principal strategic aims, which will enhance the situation concerning the education of Roma children. The aims cover the following areas:

- Pre-primary education and preparation for entering compulsory education
- Optional teaching of the Roma language, history and culture for Roma children and others children who express interest
- Assistance in the course of compulsory education
- Career counselling
- Assistance to students during studies vocational training

- Although the problem is less prominent than in the EU countries, **the early school leavers** are seen as the “*greatest problem of VET with special emphasis on vocational schools*” in **HU** and an issue, which deserves *special attention* in **SL**, where a special law was taken on “self awareness programme for young early school leavers”. In these countries, it is a priority to get these young people back to education. Although not being exactly early school leavers, children working in **TK** in agriculture and industry are even more at risk of exclusion, Therefore, specific measures have been taken such as:

In Hungary, the measure entitled “**Development of Vocational Training with Respect to Content, Methodology and Structure**” Aims at elaborating a training alternative whereby the school is able to keep students exposed to the danger of dropping out in training and can ensure that they obtain qualifications. Teacher training is part of this programme.

- On the opposite, the issue of disabled is mentioned as a priority in almost all country reports (**HU, BG, CZ, CY, LT, PL**) with specific policies combining the development of special institutions and their integration in the mainstream of education. This concerns secondary but also higher education as in **HU**:

GP 25. In Hungary, the Act on Higher Education (Act LXXX of 1993) amended several times and enacted on 1st September 2002, contains provisions on ensuring conditions facilitating **equal opportunities needed for**

²³ Although surprisingly the Hungarian report doesn't mention it.

the studies of students living with a disability. Upon application, supplementary support may be granted to institutions in respect of students living with a disability. In 2002, to establish the conditions assisting the studies of students living with a limitation in motion, the Ministry of Education appropriated a specific funding for removing obstacles from the buildings of higher education institutions that may apply for funding along with providing proof of 50 percent own sources. In 2003 own sources to be provided by the institution will be reduced to 30 percent.

- As part of the social integration policies, other programmes cover socially disadvantaged people (**BG, HU**), students with special needs (**SL, BG, MT**), people living in rural areas (**TK, LT**), women returning to work (**LT, EE**) and children of migrants (**LT**). In **PL**, a special programme has been set up for the benefit of youth endangered by unemployment and social exclusion, youth unemployed and disabled:

GP 26. In Poland, a program „**First work**” within the framework of Governmental Social and Economic Strategy „Entrepreneurship – Development – Work: has been realized since 2002. The aim is to help young people to obtain first professional experience, which will enable them to check the knowledge and skills acquired at school and will increase their chance to enter on the labour market. This program introduced new instruments and undertakings facilitating the professional start of young people. The most important instruments are as follows: (1) allocating grants for the development of academic **offices of professional career** and establishing Gmina’s Information Centres (2) providing all secondary schools with publication “**Occupational guidance kit** for the candidates for the certificate of upper secondary school” (3) dissemination of a manual “Independence in seeking first job” for running information and training group activities with school graduates, (4) publishing “**Vademecum of best practice**” in a form of series of manuals presenting the most important solutions in the scope of graduates performance, (5) implementation of a project “**Green workplaces**” addressed mainly to graduates of forestry secondary schools and children of former workers of state farms. Within the framework of the program „First work” from June 2002 to May 2003 – 155.000 graduates participated in such active programs of labour market as: traineeships, trainings, subsidized employment. 600.000 graduates received other kind of aid in a form of professional counselling or help from the employment agencies.

- In **RO** integration of students with special needs in mainstream education is important as follows:

GP 27. In Romania, too many young people (especially Roma) have ended up in institutions for special needs education for physically and mentally disadvantaged in the past. The Romanian policy aims to integrate the special needs and disadvantaged groups in regular education rather than separating them from the rest of society. Reform started in 2002 with support of Phare. This will result in closing down some special needs institutions, reconvertng the best ones into regional centres of expertise. Regular schools will receive training and guidance for teachers and career counsellors and adapted curricula.

- In **CY**, initiative was taken to use telecommunications and Internet as a tool to touch several groups as part of policy aimed at promoting equal opportunities.

GP 28. The Cyprus Telecommunication Authority of Cyprus (CYTA) Which is a semi government organisation, offers the programme " **internet for all**" which provides the opportunity to all interested persons to be trained free of charge and to familiarise themselves with the internet. As part of its social contribution CYTA also facilitates communication for deaf people through its "**telephone service for the Deaf 1408/1409**". This service is offered on a 24 hours basis to people both in Cyprus and abroad, who have access to a fax machine. CYTA offers three free connections (wire phone, mobile and internet) to persons with disabilities (deaf persons, blind persons and persons with sever motor disabilities). Persons with disabilities are funded to buy their own new technology related equipment (e.g. PCs, mobiles, fax machines etc) through the **Self Employment Scheme**, which is part of the effort towards the vocational rehabilitation of the disabled and the Scheme for special financial assistance to the disabled persons for the provision of technical aids and equipment for facilitating their living and employment.

6.c) Participation in LLL of young people, not covered by the formal system.

- Acceding countries have set up recent policies dedicated to youth outside the formal education system. It concerns young unemployed but also early school leavers and dropouts, but also young students for out of school activities. Country reports present different measures concerning different types of situation.
- **Integration of young unemployed into the labour market** is promoted in **LT**, **CZ** and **CY** through different schemes:

GP 29. In Cyprus the HRDA, also provides training opportunities to young people leaving school without skills. They can participate in the following initial training programmes: **Multi-company accelerated training programmes** mainly addressed to school leavers and unemployed adults seeking employment in occupations where there are labour shortages. They are organized by HRDA in partnership with public and private institutions. They combine theoretical and workshop training at a centre with workplace training. **In-company (single-company) initial training programmes:** organized by enterprises for meeting the initial training needs of their newly employed personnel. These programmes cover a wide range of transferable basic skills needed in various sectors of the economy. **Management/industrial training of tertiary education graduates:** Newly employed tertiary education graduates may participate in these training programmes for the purpose of acquiring hands-on experience and management knowledge for a period of either 6 or 12 months.

GP 30. Since the year 2000 the Lithuanian Labour Exchange has implemented the programmes “**The First step in labour market**” and of Active integration, addressed to school graduates, registered at labour exchanges. The goal of the programmes is to integrate young people with professional qualification into the labour market within 6 months. The programme includes carrier planning elements and participation in active labour market measures, e.g. participation in supported works for gaining practical skills, short-time training courses for narrow specialization and etc.

- **Participation to local community activities, socialization, education to leisure and voluntary work** are also subjects of policies adopted recently and developed through non-formal and informal learning. This was done in 2003 in **CZ** through the adoption by the government of the Policy for Children and Young People until 2007, through the Youth for Community (2000) and Youth for Village (2001) programs and also through a Program on Socialization of Children and Youth adopted in 2002 in **LT**, through activities of local youth councils in **SL** and through the activities of the Labour Corps Ochotnice Hufce Pracy (OHP) in **PL**. This made often use of the EU Youth programme (**EE**). This type of measures involves often cooperation between Ministries of Education, Labour, Health, Interior and Social Affairs. Other initiative is the creation of a Chamber for Young people in **CZ** in 2001:

In the Czech Republic, in 2001 the Minister of Education, Youth and Sports set up a **Chamber for Young People**, which is an inter-ministerial advisory body to the Minister. The Chamber for Young People is involved in developing a coherent outline for state policy concerning young people. Moreover, a Council for Leisure Education was formed at the level of the Ministry of Education, Youth and Sports.

- Other countries insist on the alternative to formal schooling by promoting apprentice schemes as an adequate solution for drop outs in **MT** and **CY**²⁴, or a network of “open education” institutions including the project on “Open Education Society Learning Centre” in **TK**, or even a second chance school in **MT**.
- Finally, **CZ** initiated in 2002 a program aimed at providing financial support for projects designed to promote international exchanges of children and young people.

6.d) Ageing population

²⁴ Which doesn't seem to be appropriate as according to the monograph on Cyprus, the quality of the apprenticeship system is rather poor.

- LLL activities concerning ageing population were also considered by some countries during recent years. Particularly in **LT** with specific program in 2002 addressing long term unemployed including pre-pension age people with low qualification, and in 2003 with the "55+" program addressed to senior citizens with the aim to facilitate their better re-integration into the labour market.
- In general, many countries state the opening of all kind of education and training activities for all, without any age barrier, in normal setting or through specific arrangements such as evening courses, distance education (as proposed in **BG**) including the project of Open University in **CY**.
- In addition, some **third age universities** provide elderly people with a variety of training courses (**CZ, SL, PL, MT, SK**).

6.e) Counselling and guidance services

- The monographs reports had seen the counselling and guidance services well developed in all countries, but without real coordination between the different networks working in the school system and under the employment services. They were seen as well as not well prepared for the challenges of a rapidly changing labour market and LLL.
- In general, **the country reports mention only few recent initiatives** in that field and as stated by the **HU** one, *"The current career orientation framework is not efficient enough. The career orientation and guidance scheme is not uniformed and is incomplete. Properly trained professionals and equipment are not available. Also, the information systems of the existing education, training and labour market institutions are not interconnected"*.
- Nevertheless, recent important initiatives were taken in **LT** in 2002 with two **Youth job centres** established, a general support of Internet to the Lithuanian Education Information system and to the Lithuanian Labour market training authority with the support of a Leonardo da Vinci project, and also the establishment of a special mobile Centre for vocational consultation and guidance in 2001; in addition, a general upgrading and technical modernization of the Vocational guidance system is the objective of a 2001 Phare program. **PL** introduced in 2003 the idea of **school professional advisor** into the pedagogical practice. As well in **SL**, several projects are on-going in the context of Socrates and Leonardo da Vinci programs; and an important initiative was taken recently with the 11 **centres for guidance and consulting for adult education** (see above 2-a), aimed at multiply soon with the support of the ESF. In **RO**, the provision for counselling and guidance is seen as developing quicker than the demand. **HU** reports on active developments of **career orientation and counselling in higher education** and **CY** indicates the reinforcement of its network by the setting up of the National Resource Centre for Guidance. Finally, **SK** reports on the use of dedicated Leonardo da Vinci projects.

7 Creating a learning culture.

7.a) Measures to promote positive perceptions of learning

- As noted by the **BG** report, *"the culture of learning is mainly associated with the school system, including the system of vocational education and training, and in most of the cases it has been examined inadequately, incompletely and without considering its' interrelations with other social phenomena. Necessary finance resources should be allocated as well as a number of structural and institutional obstacles should be*

overcome to the effect of creating a “learning culture.” This summarizes well some of the major problems most of the acceding and candidate countries are still confronted with: the predominance of the formal school system, the poor situation of the VET system as part of the education system and the lack of and communication between education and the labour market in particular. As noted also in the BG paper, this doesn't prevent young people to continue further studies through quickly increased enrolment in higher education, which demonstrates an appetite for learning. However, this increased enrolment in HE is also the result of the high level of unemployment rate for young people having just secondary education qualification.

- Therefore, promoting positive perceptions of learning has to come first from the continuous improvement of the education system and in particular the initial VET system through better adaptation to Labour Market needs, but also from the stress on developing a diversified, flexible and quality non-formal education system, which is still largely missing in most countries. Positive perception will come as well from the acknowledgement of the value of learning and **HU** took that way in 2002 in the public sector:

GP 31 In Hungary, one of the most important measures of the new government taking office in 2002 indicating acknowledgement of the value of learning was **to raise the minimum wage of those holding a degree** in the public sector to HUF 100,000, which is twice the value of the mandatory minimum wage.

- Other incentives are used in **SL** with special prizes rewarding school pupils after competition among schools or classes, special certificates given to the best craftsmen by the chamber of crafts, and another one aimed at promoting reading

In Slovenia, other promotional activities have been in place in the formal education and training system. More than half of compulsory school pupils are awarded special prizes (“reading badge”) every year for having read a number of books from a list defined by experts on a regional level. The initiative has been spread to Slovenes living outside national boundaries and reading in foreign languages (English, Italian, German).

- Moreover, other initiatives are the presentation of National education and training strategies to and **public debates** with a wider audience through conferences (**MT, CZ**), forums (with the example of the **LT** National Forum and then regional forums set up as a follow up of the Dakar Summit), a yearly learning festival (**SL**), special fairs, **Adult education weeks (CZ, SL, LT, EE)**, education TV networks (**MT, PL**), Ministerial web pages (**TK**) have been used in the last years.
- Another important measure consists in interesting parents by working with them to promote positive perceptions of learning in general (**LT**), or to support girls participation (in the Vocational High Schools for girls (**TK**), or even to involve them in the management of the education system as reported in **HU**:

In Hungary, **involving parents and making them interested in their children's studies** is the basic principle of the administration of public education. Parents are entitled to several rights during the school age studies of their children: “parents are entitled to the right of selecting the education and training institution; also, to the right to make a decision according to their children's capacities, abilities, interests, their own religious beliefs and national or ethnic status.” Parents are entitled to get acquainted with the pedagogic programme of the institution; Parents must receive continuous detailed and substantial information on a regular basis as to the progress of their children's studies. Classes in education and training institutions are organized as compulsory and alternative frames. Parents and children may request to attend alternative classes under described conditions set forth by the institutions.

- Finally, counselling and guidance services can also play a major role in this endeavour but only **CY** refers to them.

7-b) Progression and recognition requirements in the formal sector.

- Recognition of prior learning and validation of competences by the formal system are out of the most crucial issues for the development of LLL systems. This has been recognized as a priority by the candidate countries during the consultation process on the memorandum in 2001. But progress is slow. According to the **SL** report *“there is little evidence of the impact of this (recognition of prior learning) in the classroom. Education institutions are still rather rigid in their behaviour and tend to rely on formal evidence when learners pass between the systems of work and learning, between different education systems or between different paths within the system.”*
- Thus, according to the reports, appropriate systems are under development in **CZ, MT, RO, CY, TK, EE** and **LT**, and still under reflection in **BG**. And the on-going development of national qualification frameworks is already a basis for the recognition of non-formal and informal learning in VET programs in **SL** and **HU**. **MT** has the same objective and already put in place the Malta Qualification and Recognition Information Centre, which should help the promotion of the certificate supplement and the adoption of the European Credit Transfer system.

In Hungary, in adult education it is possible to reduce the time frame of studies via the recognition of prior studies or by fulfilment, in one school year, of the obligations of more than one school year. It must be noted, however, that certificates can only be obtained as a result of a successful completion of all grades of the given school level or school type; school grades cannot be left out. It is not possible to sit for the final upper secondary school leaving examinations without formally completing secondary school grades. **Vocational training is an exception to this, as, in certain professional areas, qualification tests may be taken and qualifications may be obtained on the basis of individual learning.** It is clear from the above that although it is possible in adult education to recognize previously obtained knowledge but only in subjects and knowledge gained in formal education, provided that the participant can provide proof of such studies and knowledge.

- In general, certification systems in the formal system are also under revision and some initiatives are taken such as in **LT** the transfer of responsibility for assessment of acquired qualifications for vocational students to the Chambers of commerce, Industry and Crafts.

8 Striving for excellence.

8.a) Improving quality

- According to the reports, mechanisms are in place for assessing the quality of the systems, most often as part of the general policies in education (**MT, CZ, TK, LT**). It goes generally through inspection missions by inspectors or Ministry staff.
- In addition, self-assessment procedures for education institutions are promoted in **MT, SL** and **LT**. In **SL**, this goes in hand with output-oriented assessment where the results of students in national examinations are the main criteria.
- Although this was not covered by the country reports, it appears important to mention in many countries the development of quality assurance systems, mainly through the setting up of **National Accreditation Agencies for adult education (HU, BG²⁵, RO,**

²⁵ In Bulgaria, it's part of the NAVET (National Agency for VET)

EE²⁶ in particular, **PL** for higher education) with the view to regulate and improve quality of the developing non-formal system.

- In SK a National Programme on Quality 2004-2008 is under preparation.
- As far as LLL strategies are concerned, only **CZ** mention the regular annual report done by the Minister of Education to the Parliament.

8.b) Reviewing strategies regularly

- In relationship with the lack of integrated LLL strategy, there are no central mechanisms reviewing them regularly, may be with the exception of **CY** where the planning bureau play such central role at government level;
- However, the strategic plan for education in **CZ, LT** or in **MT** are regularly reviewed through dedicated systems internal to the relevant Ministries. Other countries refer to the annual presentation of Ministries activities to the parliaments (**SL, CZ**). In **EE**, the National Council of Adult Education plays a certain role in setting priorities as well as making assessments. In **SK** the Slovak Governance Institute is a platform used for systematic reflection on policies in the education and social sector.
- **TK** and **LT** have developed research activities linked to reforms in education and set up a specific commission (**LT** in 2001) and a specific database (**TK**) open to all through Internet as a communication tool able to provide external assessments by consumers.
- Finally, **LT** mentions participation to international studies such as IALS and TIMSS and **PL** to PISA.

²⁶ In EE, a National Qualification Authority has been established in 2001

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

INTRODUCTION

In its Resolution of 27 June 2002 on Lifelong Learning²⁷, 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"²⁸, 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 2000²⁹. 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.

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.

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

²⁸ COM(2002) 678 final (November 2001)

²⁹ SEC(2000) 1832, of 30 October 2000

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)?