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**Implementing Lifelong Learning strategies in Europe:  
Progress report on the follow-up to the  
2002 Council resolution on Lifelong Learning  
Acceding and candidate countries**

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

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## 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 European Commission on the follow-up of the Council Resolution on Lifelong Learning.

The document considered the reports from Bulgaria, the Czech Republic, Cyprus, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovenia, Turkey, Slovakia and Estonia. It also took into account the ETF knowledge acquired about these countries through continuous work in them since 1995. This 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 also benefited from the cross-country report, '13 years of reforms and cooperation in VET in the candidate countries' (published in October 2003 by the ETF), and from recent events organised by the ETF, in particular the Athens conference on 23 – 24 May 2003 on the 'Lifelong development of competencies and qualifications of the workforce: 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 Lifelong Learning (LLL) in Spring 2001 – many reports gave an 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 of the initiatives presented in the country reports were really new. As a consequence, the following document has also been constrained to adopt this wider view<sup>(1)</sup>. In addition to an analysis of each country's 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 reform measures, as most of them are too recent and often still not implemented.

The document also identifies good practices as well as promising initiatives which it seemed interesting to report on as they illustrated well the process of reasoning and also the state of progress in the countries concerned. Such examples of good practice are identified by the listing title 'GP'. Selection was also difficult due to the fact that some examples concern the implementation of concrete policies whereas others refer to projects still to be translated into concrete measures. Nevertheless, in total, 32 good practices were identified, numbered in the text from GP1 to GP 32.

It is not possible to rank countries on the good practice score as many reports were of different length (from seven pages for Malta to 21 pages for Poland), of different content, some countries did not answer all questions and Romania did not follow the structure of the questionnaire.

### 1. Main conclusions

- Two years after the end of the consultation process on the European Commission memorandum on Lifelong Learning, the situation has not changed radically in the acceding and candidate countries. A range of important initiatives has been taken in most of them however they still reflect the persistent imbalance between the formal and non-formal/informal components of the LLL systems, and they have also been too recent or still ongoing so that no assessment is possible yet. Other initiatives that had been taken earlier started to be implemented during these years. Thus, some results are already apparent,

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<sup>(1)</sup> In this context, Turkey presented a particular case as no consultation process had been organised in 2001.

but as for education reforms in general are concerned, it is a long way from decisions to concrete implementation.

- As noted in the cross-country report prepared by the ETF in the summer of 2001<sup>(2)</sup>, the consultation process provoked many debates about education and training issues and had 'well helped to speed up reforms especially within adult education'. However, it is clear that the preparation for the European Employment Policy and for the European Social Fund (ESF) has also been an important force for reforms aimed at developing LLL. Finally, the increase and diversification of Phare funding which now covers most of the main LLL priorities through activities to support the renovation of schools, provide technical equipment, and modernise and create counselling and guidance centres, now play a significant role in the major fields of reforms of the education and training systems, as do the United Nation Development Programme grants and World Bank loans in some countries, the developments of the EU programmes Leonardo da Vinci and Socrates and the EU initiative EQUAL.
- As noted in many reports, the Phare contribution is predominant as part of these EU and international support programmes, working as it does 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, and regional and sectoral operational plans.
- However, the situation varies widely in different countries. The most ambitious and significant initiatives are active in the countries that were already the most advanced in terms of VET reforms as analysed in the cross-country monograph report<sup>(3)</sup>, such as Hungary and Slovenia, but also in the countries that invest more in education<sup>(4)</sup>, such as Estonia, Lithuania Cyprus and possibly in Poland<sup>(5)</sup>.
- The situation is also uneven across sectors. As already seen in 2001, the formal education system continues to receive priority with adult education as an important part of it, while little attention is paid to ways of acquiring job skills and informal forms of learning. This could be partially compensated for by measures taken under the umbrella of the Ministries of Labour as part of the National Action Plans for Employment following the EU guidelines, but with few exceptions the country reports did not demonstrate an in-depth knowledge of developments in that sector.
- Coordination, links and pathways between formal, non-formal and informal learning are still underdeveloped as can be seen in the difficulties involved in improving counselling and guidance and, in particular, in promoting cooperation between the different networks, as well as in the very slow progress in developing recognition of prior learning. However, measures aimed at improving the transition from school to work are developing, which again demonstrates by contrast the priority given to reforms in the formal system.
- Coordination between ministries is still weak and no country has as yet an integrated policy covering LLL. In most countries, the LLL coordination set up in 2001 for the consultation process on the memorandum ceased just after the end of the process. The

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<sup>(2)</sup> Summary and analysis of the feedback from the candidate countries on the Commission's memorandum on LLL, November 2001, ETF.

<sup>(3)</sup> '13 years of VET reforms in the candidate countries', draft presented to the ETF Governing Board, 17 June 2003.

<sup>(4)</sup> As measured in % of GDP devoted to public expenditure in education.

<sup>(5)</sup> The situation is difficult to assess in Poland since the regionalisation process started in 2000, when Poland had public expenditure in education close to the EU average (in % GDP).

progress of programmes and policies in each field depend on priorities set up for each sector. However, integrated policies are in preparation and many countries are striving to achieve better inter-ministerial coordination through different means.

- 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 in that field has been noted in the reports since 2001 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 set up by the European Commission as a follow up to 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 Information and Communication Technologies field (ICT) with important computer and Internet literacy campaigns for the young and adult populations, with the development of local and regional learning centres aimed at making learning closer to home, and using schools or other institutions linked to the development of local partnerships involving key local actors. ICT developments are also the main reason of Public Private Partnerships. Important activities were also initiated to foster access to education in rural areas, for 'at risk' or disadvantaged groups and to develop second-chance opportunities for school leavers.
- However, there is little evidence of learning support in the workplace by means of 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 have been noted. Teacher training is developing, but the important issues linked to re-enhancing the value 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 future member states<sup>(6)</sup>, even if many ongoing initiatives are about to provide better equipment and infrastructure. This presents a negative image in most countries and contributes to the lack of motivation for learning in some groups quoted in the various country reports.

## 2. General framework

### 2.a. Legislative and policy framework

- Although most countries have demonstrated a real mobilisation towards Lifelong Learning during recent years – in particular, as a follow-up to the consultation process on the memorandum on LLL in the Summer of 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 strategies, neither through education action plans, national plans for employment, preparation for structural funds or through amendments to the legislative framework. However, several countries are

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<sup>(6)</sup> Bulgaria, Romania and Turkey.

preparing, or have planned preparation, of such an overall strategy or concept (in Lithuania with the support of Phare 2001, and in Hungary, Malta, the Czech Republic, Slovakia and Bulgaria). In Estonia, a first draft of the 'Project of Lifelong Learning strategy' has been circulated since the beginning of 2002 and the project should be finalised by the end of 2003 after a wide consultation.

- 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 of revision with the view to integrating LLL priorities and principles: this is the case with education acts (Lithuania, Hungary, Malta, Bulgaria, Romania and the Czech Republic), or more specific acts covering different components such as pre-school education (Poland); higher education (Bulgaria, Romania, Slovakia and Estonia<sup>(7)</sup>); VET (Bulgaria, Lithuania and Romania, and the act on financing VET in Hungary revised in 2000). There are also the adult education acts (Hungary in 2001); the Adult Training Act (Estonia in 2003); Further Education Act (Slovakia in 2001); VET for Adults Act (Romania in 2002); the Vocational Qualification Act (Estonia in 2002) aimed at accelerating the development of qualification standards and providing recognition of prior learning; the Employment Promotion Act (Bulgaria in 2002); and the Public Utility and Voluntary Activities Act (Poland in May 2003) aimed at fostering non-formal training in the non-profit sector.
- Important strategic documents or programmes concerning developments in education were adopted recently: examples are in the Czech Republic with a Long Term Plan for Education, adopted in 2002 as a follow-up to a white paper produced in 2001; in Latvia with the Education Development Concept accepted by the Government in 2002 and the Vocational Education Development Programme 2003 to 2005 recently adopted in September 2003; in Romania with a strategy for the development of pre-university education from 2001 to 2004; in Turkey with the Basic Education Programme; in Poland with the Strategy for the Development of Higher Education until 2010 and the Strategy of Continuing Education until 2010<sup>(8)</sup>, in Slovakia with the 'Millennium project' adopted in 2002 and, more recently, the document on the Further Development of Tertiary Education.
- In addition, policy documents aimed at preparing for the European Employment Policy and for structural funds make reference to LLL and to the set-up of complete frameworks for integrated Human Resources Development (HRD) policies through national development plans in general, as well as HRD sectoral operational programmes (Hungary, Poland and Slovakia), single programming documents (Lithuania and Estonia), the National Action Plan for Employment (Romania and Slovakia), the Strategic Development Plan set out for the period 1999 to 2003, and an integrated HRD strategy in Cyprus.
- In the countries where they have been recognised, regions play a role in establishing their priorities within the general framework set up at Government level: thus, in the Czech Republic, 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; it is the same case in Slovakia with the transfer of competencies on education and employment to eight regions and the ongoing establishment of regional councils for VET; so too in Slovenia with Regional Human Resource councils; in Turkey with regional or districts boards for public education; in Romania with local committees for the development of social partnership in VET; and in Hungary where the Development and

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<sup>(7)</sup> In Estonia the main purpose is preparing to join the Bologna Process and also to provide recognition of former studies and work experience.

<sup>(8)</sup> This document on the strategy of continuing education should be approved soon. It comes from the Ministry of Education without real involvement or coordination with the Ministry of Labour, which in parallel is preparing a National System of Vocational Education (in fact continuing training).

Training Sub-Fund is allocated to regions according to their priorities, and regional centres of excellence have been set up as part of the Regional Operational Programmes (in the context of the preparation for Structural Funds). In Poland, 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 poor.

- In some countries, local authorities play an important role since they are involved in the financial management of schools, but there is the feeling that they have still not been sufficiently involved in the coordination process on LLL (Estonia).

## **2.b. Inter-ministerial coordination**

- These policy and legislative activities referring to Lifelong Learning generally remain under the supervision of the ministries of education in cooperation with ministries of labour and other ministries, when appropriate. HRD policies linked to preparation for Structural Funds are mainly the responsibility of the ministries of labour in coordination with specific ministries (or national agencies) for regional development as well as with the Ministry of Economy and Ministry of Education, among others. Nevertheless, as noted recently in the ETF monographs<sup>(9)</sup>, inter-ministerial coordination on VET and LLL issues is still a major problem in many countries. This is also reported in some country reports, such as that of Malta, which says, 'With the awaited policy document it is hoped that there will be more synergy between all stakeholders'.
- Thus, some countries either make use of governmental bodies (the Planning Bureau in Cyprus), or they set up specific responsibilities and committees at Prime Minister level (Inter-departmental Committee for Development Policy Coordination in Hungary), or they set up specific offices in charge of coordination in HRD (in 2002 the Czech Republic set up 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. It also serves 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 (Bulgaria, Slovenia and Poland).
- Finally, regular tripartite committees or expert councils set up close to ministries of education and labour and including representatives of social partners, also contribute to coordination work in strategies for HRD, but according to the monographs, coordination under these committees is rather formal. In Estonia the National Council of Adult Education acts as an advisory body to the government; it associates five Ministries and the largest NGOs under the leadership of the Ministry of Education. In Latvia, the Council for Cooperation in Vocational Education was set up in 2000 in order to improve cooperation in VET; it includes representatives of different ministries as well as of the Union of local Governments and Social partners, and representatives of each vocational education establishment.
- In some countries, special ministers were appointed for Information and Communication Technologies (ICT) and are now playing a major role in fostering the ICT dimension of LLL policies in cooperation with Ministry of Education and/or Ministry of Labour: the Minister for

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<sup>(9)</sup> 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 contribute 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 future member states (with the exception of Turkey) and their publication is underway: Lithuania and Slovakia are already available.

Informatics in the Czech Republic in 2003, the Minister of Information Technology and Investment in Malta, and the Minister of Information Society in Slovenia.

## **2.c. Financial framework**

- As well as Lifelong Learning policies, LLL financing operates under the regular funding mechanisms set up for the different components of the education and training systems. Recent reforms took place in Romania with the decentralization of funding to local councils in 2001/02, and in Lithuania with the introduction of a new funding mechanism based upon the 'money follows the learner' idea. Furthermore, incentive schemes were put in place in some countries, and the training funds operating in Cyprus and Hungary were recently redirected towards LLL priorities. New financing schemes are also under preparation in Slovakia 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, also play an important role. In particular it appears that a considerable amount of Phare funds have been made available for reforms linked to LLL during the past few years.

## **3. Building up partnership**

### **3.a. Local-level partnerships**

- Bringing learning closer to home has been one of the most popular messages from all future member states during the consultation process on the Lifelong Learning memorandum. This has now been confirmed 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 regional or local level with the view to organising better cooperation between all players and to develop the role of existing schools or universities in LLL programmes (the Czech Republic with regional committees for education and employment, Romania with local committees for the development of social partnership in VET, Lithuania's Regional Forums, and Slovakia with Regional Councils for VET), while other countries make use of existing structures, local councils (Malta), local authorities (Cyprus) or provincial or district boards of public education (Turkey), as well as the tripartite committees to the Regional and Local Labour Offices (Slovakia). But these initiatives depend on the quality of respective representatives and on the quality of cooperation between Labour Offices and local educational authorities. They are often hindered still by the 'insufficient cooperation between schools and companies' (the Czech Republic).
- Other countries set up or continued to develop specialised centres including Regional Training Centres able to act as providers and/or catalysts for LLL schemes: Hungary with Regional Centres of Excellence to support the role of higher education institutions<sup>(10)</sup>; Lithuania with six regional centres already in place; Estonia with five regional centres; the Czech Republic with some initiatives with social partners; Slovenia with Guidance and

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

Counselling Centres for Adult Education (see GP1, below); and Latvia with the Latvian local Government Training Centres, often combined with adult education centres.

**GP 1.** In Slovenia, 11 local Guidance and Counselling Centres for Adult Education have been established during the last three years. Every centre plays the role of coordinator 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 the interests of relevant stakeholders, and to tailor the provision accordingly.

- Furthermore, some countries make use of either grant schemes in order to foster such local partnerships (Lithuania and Hungary) or of EU schemes or programmes such as EQUAL (the Czech Republic) or Phare (Lithuania). Sometimes, with the support of local governments, general and vocational schools start to play a role of LLL centres (Estonia).
- Slovenia makes use of the decentralised part of the national curricula to develop discussions on the training needs with all relevant players

### **3.b. Social partnership in Lifelong Learning**

- As stated in section 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 Lifelong Learning 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 Lithuania the National Education Forum was set up in 2001 following the Dakar World Education Forum; in Hungary it was the National Council for Adult Education in 2001; in Latvia, the National Tripartite Sub-Council<sup>(11)</sup> for cooperation in VET and employment was set up in 2000 with the idea to establish regional sub-councils; and in the Czech Republic social partners should be involved in activities of the newly established Government Council for HRD.
- However, as noted in the conclusions of a recent conference on LLL and social partnership<sup>(12)</sup>: '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

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<sup>(11)</sup> This sub-council is part of the institutional system of the National Tripartite Council for Cooperation, whose aim is to promote cooperation between government, employers and employee organisations on planning and implementation of national policies and of strategy in vocational education. This is different from the Council for Cooperation in VET mentioned above in 2.b., which comprises one representative of each VET school as well as other organisations.

<sup>(12)</sup> Conference 'Lifelong Development of Competencies and Qualifications of the Workforce: Roles and Responsibilities' (Athens, 23-24 May 2003), organised jointly by the ETF, Cedefop, the Federation of Greek Industries and the Greek General Confederation of Labour.



levels'. As well, the Slovenia report complains of the lack of 'effective engagement of trade unions' and also 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 Estonia with the tripartite agreement on employment signed in 2002 which included the establishment of a working group for developing financing schemes for continuing training. Poland is also 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:

**GP 2.** In Poland, the cooperation with social partners may be investigated on the example of the 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 five main employers organizations and trade unions participated in the Working Group. The partners adopted five priorities: (1) financing the system; (2) developing information and stimulating the quality of training; (3) support instruments for employers; (4) support instruments for employees; and (5) establishing the organisational 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. Until the end of 2003, within the frameworks of the Phare 2000 programme, it is planned to: (1) prepare the analytical overview of solutions applied in five EU states; (2) develop elements of the Polish model of cooperation between social partners; and (3) prepare a conference and publications concerning the cooperation between social partners in the field of training employees.

- Also worth mentioning is the important role of the social partners in Estonia in the consultation process regarding the Project of Lifelong Learning 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, as well as from the private and public sector. At the start of 2002, the working group presented to the Ministry of Education the first draft of the strategy. It was sent to more than 40 organisations for comments – ministries, training institutions, employers and employees organisations. At the start of 2003 the working group began amending the text of the strategy according to the proposals. A working group has been founded to compile the Strategy of Education. The first version of the strategy was 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 were made. The Strategy of Education should be finally compiled by the end of 2003. After that it is planned that the Project of Lifelong Learning Strategy be given to the Minister of Education and Research to take a stand. The idea is that the Strategy of Education is the document which encompasses the different spheres of education as well as including strategies for every sphere (for example the Lifelong Learning Strategy).

- The 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 those of the Czech Republic:

**GP 4.** Social partners also take active part in a Phare project in the Moravia-Silesia Region entitled KRAJ (a Czech acronym for Comprehensive Development of Activities of Individuals), 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 this region, which should deliver formally recognised Lifelong Learning courses in cooperation with social partners in the development of the respective courses, their evaluation and arrangement for placements of the trainees.

- To be mentioned as well is the role played in some countries by important NGOs involved in adult education which associate numerous partners from different spheres, such as ANDRAS<sup>(13)</sup> and the Estonian Non-formal Adult Education Association in Estonia.

### 3.c. Participation of education and training establishments

- In general, participation of education and training institutions in Lifelong Learning programmes is supported by governments through regular consultation with heads of schools or university presidents, but also through specific programmes often combined with dedicated funding (for example, in Cyprus with HRDA<sup>(14)</sup> support, in Hungary through the Development and Training Fund, in Lithuania through open tendering, in the Czech Republic through the Higher Education Institutions Development Fund in particular), and/or Phare and EU programme funding (Socrates and Leonardo da Vinci), such as in Lithuania:

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. For example, the number of schools participating in the Socrates programme is annually increasing: in the Comenius programme the number increased from 73 schools in 2000 to 121 in 2002; in the Erasmus programme 14 state universities and eight colleges took part in the 2000/01 academic year, in 2001/02 this number increased by two private universities; the number of Grundtvig programme projects expanded from nine in 2001 to 17 in 2002. Ongoing Grundtvig projects, like the '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 the 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. For example, in the Phare 2001 call for proposals, 22% of all applicants comprised education institutions (universities, colleges, vocational and general education schools).

- Most countries insist on the role of universities in delivering continuing training programmes (Hungary, Bulgaria, the Czech Republic, Lithuania, Malta, Turkey, Poland, and Estonia), and opening structures to part-time students (Slovakia and Estonia). Several set up 'third age universities' (for instance, the Czech Republic, Malta, Poland, Slovenia and Slovakia), as well as open universities for adults which aim at offering formal education and flexible in service training, as in Estonia with the Tiger University State Programme. This has been reinforced by the possibility to register previous studies and work experience given by the Universities Act in 2003.
- Other countries insist rather on the use of schools (even primary schools in some countries and also VET schools) often called on to become local learning centres, LLL centres or non-formal education centres, as well as offering other training centres aimed at proposing LLL and in particular ICT courses or other specific activities, such as giving support to parents in Malta. In this context, schools start to be opened beyond the 'normal' schooling time:

**GP 5.** In Turkey, in order to provide education for more people by making use of buildings, facilities, equipment and personnel of vocational and technical education schools, institutions are open between 7 a.m. and 12 p.m.

<sup>(13)</sup> Association of Estonian Adult Educators.

<sup>(14)</sup> Human Resources Development Authority.

including weekends, mid-term and summer vacations in accordance with the 'Full Day-Full Year Education' implementation. Within the context of these implementations, and taking into consideration the interests, demands and skills of individuals, the institutions provide all types of long- and short-term certificate/diploma programmes.

- Participation in education and training has in most countries also benefited the important development of private schools and training centres for both the young and adults (Estonia and Slovakia, but also Hungary, the Czech Republic and Poland). However, as a consequence, there is a lack of transparency and in particular, in the case of Estonia, a lack of databases on learning opportunities.
- In some countries, adult education associations or foundations play an important role such as in Latvia the Latvian Adult Education Association, a non-governmental umbrella organisation and network of providers of adult education, founded in 1993 with the view to facilitating the development of adult education, to participating in the LLL policy development and to promoting the development of civic, democratic and open society.

## 4. Insight into the demand for learning

### 4.a. Access to basic skills for all citizens<sup>(15)</sup>

- This has been made a priority by all countries through a variety of policies and measures aimed at facilitating access, mainly in the formal education system. The first measure concerns developing infrastructures through expanding the education and training system (see 2.c. above), modernising schools and other training centres, and equipping them with ICT and Internet facilities. Furthermore, in 2000 Lithuania developed the 'yellow bus' project offering transport to schoolchildren, especially in rural areas. Hungary also started a programme of refurbishment of schools and in particular VET schools, including particular focus on dormitories:

**GP 6.** In Hungary, a 'Development Programme' has been created for vocational schools. It will be implemented in the period between 2003 and 2006 and will include 20-25% 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 is to be completed by 2006, and will be covered in part from the central budget and in part from the Fund for Vocational Training

- The second measure concerns the age, duration and organisation of schooling, with Romania increasing compulsory education from eight to 10 years starting at six years of age instead of seven, Turkey considering similar increases and Poland making compulsory one year preschool attendance at six years of age after having increased compulsory education age to 18. Interesting is the initiative taken in Estonia 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 three years.

<sup>(15)</sup> Answers from countries cover either "for all" or "basic skills", but rarely both elements. Therefore, the document reflects this diversified approach, though it could have been argued to analyse the first kind of answers under the chapter on access.

- The third measure refers to curricula reforms with the introduction of basic and core skills – in particular for VET curricula – and the use of the decentralised part of the national curricula to adapt to specific local needs (Hungary). This reform process is ongoing in all countries, but still far from being completed according to the reports. It still faces difficulties when setting up appropriate structures (in Slovakia with the National Curricular Council, which was still to be set up at the end of 2002), and needs a concerted effort in terms of teachers training (mentioned in Slovenia) and specific adaptation for adult training (Romania). Modularisation of curricula is also mentioned as a condition to allow access, in particular to lower level qualifications (Hungary and Romania). Finally, greater autonomy given to schools in the management of additional budgets encourages schools to take more responsibility in developing pupils' knowledge and skills (Poland).
- The fourth measure concerns the specific focus given to some target groups: the youngest with the generalization of kindergarten (Romania); the early school leavers and dropouts with second chance schools (Cyprus, Lithuania, Malta and Hungary) or special classes for slow learners (Malta); teachers working alongside these pupils with specific training (Slovenia) or with apprentice schemes (Cyprus) as another means to acquire relevant qualifications as well as through folk universities (Slovenia); the children with special needs (Lithuania) and the disabled in tertiary education (Slovakia); 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 Cyprus); the Roma children in Slovakia with the creation of a 'zero grade school' aimed at preparing integration of Roma children in basic education as well as 240 Roma teacher assistants in schools with the role of carrying out this policy; and the unemployed with the limited sets of active labour market measures<sup>(16)</sup>. In Turkey, a special project was launched in 1997 (and completed in 2000) on the education of girls and women.
- The fifth measure is about basic skills themselves: in general the focus was on basic literacy and numeracy (Malta, Slovenia and Romania) but also on computer literacy (Turkey, Slovenia, Malta, Hungary, Poland, Estonia and Latvia), on entrepreneurship (Turkey, Lithuania and Poland), on foreign languages (Slovenia, Turkey, Poland and Latvia) and in social sciences and human behaviour (Latvia), with an interesting initiative foreseen in Hungary:

**GP 7.** 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% of the available time frame.

#### **4.b. Developing Information and Communication Technologies (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 in schools increased considerably in all countries, even if the ratio of students per computer in most countries is still not comparable to the EU average. Particular examples are given with the creation of dedicated ministries (the Czech Republic, Malta and Slovenia), with special budgets allocated to ICT development (Poland), with government programmes, such as the 'Tiger Leap' project in Estonia and since 2001 the 'Tiger Leap Plus' programme, the INFOVEK and the Slovak Telecom projects in Slovakia, and in Turkey which states that

<sup>(16)</sup> Linked to the limited funding available from the employment funds in most acceding and candidate countries (see the ETF monographs).

'eLearning will be put into force at every level of formal and non-formal education', the National Strategy for the Implementation of an Information Technology Society in Romania, or the National Information Society Development Concept adopted in 2001 in Lithuania involving much work at government and parliament level:

**GP 8.** In Estonia, 'Tiger Leap' helps to provide teachers with elementary computer skills, and it guides them to use the opportunities offered by information technologies, supports curriculum development, encourages creation of original software in the Estonian language, and supports schools in getting connected to the Internet. The Tiger Leap Foundation was created in 1997, and from 1997 to 2000 the foundation administered financial resources allocated to the programme from the national budget. In 2000, Estonian schools were furnished with the means of information and communication technology to the following extent: 25 pupils per computer on the average (there are no upper secondary schools or basic schools without computers); 75% of all the schools have constant Internet connections and the remaining schools have a dial-up option. In 2001 the Tiger Leap Plus programme was approved by the session of the Estonian Government. It focuses on support for ICT development in 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.

**GP 9.** In February 2001, the Lithuanian Government approved the National Information Society Development Concept, in which the major priority is strengthening 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 open learning and information centres with multimedia facilities, which should ensure the access to information for all strata of society. The Programme of Renovation and Modernisation of Libraries to run from 2003 to 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 introduce ICT skills for all (the Czech Republic, Lithuania, Hungary, Bulgaria and Malta) and to use schools and other local training centres as the vehicles for such ICT literacy activities, often organised in reference to the European Computer Driving Licence (ECDL) (Lithuania, Malta and Estonia) and other more advanced certificates. As for example in Slovenia:

**GP 10.** In Slovenia, the ministries of Education and of Information Society have jointly established a network which presently consists of 21 e-schools as centres of ICT learning in local environments. The involvement of local communities in providing the necessary workforce for these centres to function is rewarded by investment in hardware and Internet facilities. They are designed to provide the population not able to access ICT from home with the basic skills in this area and effectively use the technology, to prevent the creation of the digital divide. The e-schools also provide opportunities for inter-generational learning – passing of knowledge and skills from the younger to the older generation, in this particular case.

- These dedicated action plans (all countries), often concerning specific target groups (unemployed from industries affected by restructuring in Slovenia, adult women in Lithuania, teachers and trainers in the Czech Republic and Cyprus, rural populations in the Czech Republic and Estonia), are also important because of their efforts in continuing to equip schools and training centres. As examples, under the 'SuliNet Expressz' in Hungary, every school will have access to the Internet by 2005, and Lithuania will set up one computer for every 10 pupils in every school by 2004. These endeavours are supported by state funding and by other grants coming from Phare, the UNDP, the eEurope initiative as well as private contributions (Microsoft in Lithuania) and foundations (Soros, in particular). In Estonia, the Internet is also used as a tool for improving the quality of life for Estonian

residents through the 'Look@World' project.

**GP 11.** To support the use of Internet and improve 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 also found partners in government and non-government sectors. The project provides learners with free-of-charge Internet education (in eight hour blocks) and the participants in the project get an opportunity to use web-based public services offered by the State and local municipalities as well as 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 meet the needs of large groups of the population and are the subject of 'immense popularity' (Malta). However, there is the need to differentiate between computer literacy and the much more ambitious attempts to use ICT and the Internet as a tool to learn subjects other than computing. 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 (Slovakia). Also, as seen in the monograph reports, success is not always guaranteed as, in general, most teachers are 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 in the workplace**

- As we know since publication of the CVTS2 study by Eurostat, training for employees in the workplace is developing but at a significantly lower level in most of the acceding and candidate countries than in the EU. ETF monographs confirm this analyse, concluding that most employers do not consider training as an investment. However, as stated during the Athens conference on 'Lifelong Development of Competencies and Qualifications of the Workforce: Roles and Responsibilities' (see above), development of training for employees, particularly in the workplace, is often seen as a crucial need. In particular, 'Firms have a major role in creating an appropriate learning environment in 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 taken at company level, but it is also up to government authorities to contribute to the setting up of an adequate framework. In this respect, a few initiatives have to be mentioned: in Hungary, the Adult Education Act (2001) provides consumer protection to those participating in training in 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 Cyprus, under the Training Support Scheme supported by the HRDA, technical and financial support is given to businesses for the design and implementation of initial and continuing VET; in Estonia, 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 seven days for non-formal learning); in Poland, where tax incentives already exist, the best tools and approaches to develop training in companies are still under discussion as part of the working group set up in the context of the Phare project concerning the National System of Vocational Training<sup>(17)</sup>; however, other initiatives have already been launched in Poland, such as:

**GP 12.** In Poland, the 'Investor in Human Resources' programme is run under the auspice of the MELSP. The firms which invest in human resources are awarded a special prize. Every year the emblem 'Investor in Human Resources' is awarded to approx. 40 firms, including large, worldwide consortiums and small Polish firms. The businesses awarded this emblem may compete for the title 'Leader in Human Resources Management' – a competition organised by the Institute of Labour and Social Policy. The third edition of the 'Leader in Human Resources Management' competition took place in 2002: 14 firms were awarded this title. The President of the Republic of Poland took over the patronage of honour over this competition in 2003.

- References to in-service training have also been introduced in the Labour Code in several countries and recently in Lithuania (2002) where it is proposed that the time spent in training should be considered as working time. Turkey shows an interesting initiative:

**GP 13.** In Turkey, it was agreed to establish educational units at the businesses as a result of Law no. 4702 enforced on 10 July 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 businesses which employ 20 or more staff.

- Incentives for individuals are also a way to promote training for employees. Slovenia mentions the recent adoption of tax relief for people 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 (Malta, Bulgaria, Turkey and Cyprus).
- In addition, some country reports understood workplace training also as practical training for students, or apprenticeship training (Malta, Bulgaria and Slovenia) by expressing an interest to develop such training in combination with school attendance, or in the context of preparation for state exams and diploma thesis (Latvia).

#### **4.d. Incentives to help companies, particularly SMEs**

- Following the conclusions above on the underdevelopment of training in the workplace, the Athens conference reinforced the conclusions by emphasising 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

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<sup>(17)</sup> See above under 3.b. In this working group, the discussion concentrated on such instruments as the Enterprise Training Fund, the Enterprise Training Plans, longer individual training leaves for employees, replacement of an employee who undergoes a training, documentation of professional qualifications, certificate of 'Investor in Human Resources', a collection of training modules recommended by the state, and a collection of standard professional qualifications.

(self-employed) or resources (SMEs)'.

- Nevertheless, training funds are available for supporting workplace training in a few countries, such as in Hungary with the Development and Training Fund, and in Cyprus with the HRDA:

**GP 14.** In Cyprus in 2002, the national agency responsible for vocational training, the Human Resource Development Authority, 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 companies 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 informal) context and is largely dependent on the 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 businesses 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 in being set up. As a result, 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 Slovakia.
- However, ministries of economy and/or national agencies contribute to the development of small businesses (Malta, Turkey and Lithuania) by supporting the development of business information centres or business incubators, as well as through tax exemptions aimed at promoting training (Turkey) and specific initiatives such as Enterprise Estonia in Estonia, which provides financing products, counselling, cooperation opportunities and training for entrepreneurs, as well as a support training project for employees as part of the national support system for entrepreneurship.
- In 2003, Hungary 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 the payer on the certificate issued by the accredited institution of adult education. The amount of tax-reducing support is 30% 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 countries<sup>(18)</sup>. However, although the important endeavour was towards teacher training, still many country reports do not demonstrate that this priority has received sufficient resources and attention as yet.

- However, in Hungary, measures were taken to increase attractiveness of the profession, in particular through a one-off 50% salary rise; in Latvia, a mechanism has been developed during the last two years for raising teachers' salaries – however, the average teacher's wage is still lower than the national average. In Poland, 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 for teachers in the education system (level 0-4 ISCED) will be continued and remain connected with the reform of their remunerations, introduced by the Act from February 2000. The adopted solutions subject the amount of teacher remuneration to the teacher's qualifications, invention and consequences in service training. Five 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 conclude by a positive assessment of professional teaching achievements, and moreover obtain the acceptance of the Qualification Commission or pass 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 aimed at personal development and the improvement of the level of schoolwork. The adopted system regulations encourage teachers to improve their performance, innovation 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 the profession and the basic amount of average remuneration in the state budgetary sphere were as follows: January 2001 [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 (Cyprus, the Czech Republic, Lithuania, Malta, Hungary, Bulgaria, Slovenia and Poland) as part of the activities undertaken by the ministries of education and/or national agencies for education. Sometimes it was made compulsory, as in Poland where, since January 2002, each school is obliged to allocate funds to finance in-service teacher training to the amount of 1% of their annual financial resources. It has also been encouraged by specific incentives concerning career advancement (Hungary) or by the measure in Estonia where the training of teachers cannot amount to less than 3% of their yearly salary fund. In Slovakia, educational vouchers for in-service training are under discussion at the Ministry of Education. In Latvia, the Vocational Education Teacher Certification Committee (instated in 2002 by the Minister of Education and Science) evaluates and takes decisions concerning the compliance of knowledge and skills acquired by teachers through professional development courses or through self-learning.

**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 recognised by a one-off material allowance provided once every seven years, namely, by reducing by one year the period before an automatic advancement in salary class. The State covers 80% of the training costs from the amount ensured for this purpose in the act on the Central Budget. Upon the fulfilment of certain conditions,

<sup>(18)</sup> Picture is diverse according to the countries: for instance teachers' salaries were relatively similar to the EU in Cyprus, Malta and Turkey when they were markedly below in other countries.

the State covers 100% 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 (Lithuania and the Czech Republic), and from the role played by NGOs such as ANDRAS<sup>(19)</sup> in Estonia. However, there is no evidence of systematic in-service teacher training except in Slovenia and in Hungary since the law on adult education was passed.
- Nevertheless, there are attempts in some countries to set up adequate standards for teacher training and to cooperate with universities in that context: Lithuania gives an interesting example where a new updated concept for Vocational Teacher/Lecturer was adopted in 2002<sup>(20)</sup>.

In Lithuania, the concept of a 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 started in Vytautas Magnus University at the start of the 2002/03 academic year.

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

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<sup>(19)</sup> Association of Estonian Adult Educators.

<sup>(20)</sup> This project had been supported by the EU in particular by the ETF and Leonardo da Vinci.

## 5. Adequate resourcing

### 5.a. Target for investment in human resources

- There is no global target for investment in Lifelong Learning in the acceding and candidate countries, with the exception of the Czech Republic, where a government policy statement 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 the exception also of Slovakia where the National Programme of Upbringing and Education in the Slovak Republic over the next 15 to 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). However, the Integrated LLL strategies to come in several countries should include such targets (Malta).
- Slovenia set up specific targets related to different LLL components (ICT, education buildings and equipment, support to less advantaged students, subsidies for transport and 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. This is done through qualitative statements as part of the policy documents mentioned above. These statements are often supported by budgetary commitments including sometimes references to the Structural Funds (Hungary).
- However, some countries also set up quantitative targets, but without reference to the EU benchmarks, neither to 2010: thus Lithuania has targeted for 2012 that no less than 95% schoolchildren acquire basic education, the share of early school leavers/dropouts does not exceed 9%, more than 80% of the 25 to 29 year-olds gain at least secondary education and no less than 85% of the working age population have real access to ICT and ICT skills. Poland's targets come from the JAP process, although they were not mentioned in the report<sup>(21)</sup>. Also, Turkey's schooling targets as part of its eighth Five Year Development Plan ending in 2005 are 25% at pre-school education, 100% at primary education, 75% at secondary education and 37.3% at higher education.
- Cyprus has also set 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 redirected funding

- In general, countries refer to budgetary increases<sup>(22)</sup> for different areas of the education and training systems (the Czech Republic, Hungary, Turkey, Cyprus and Poland). Some explicitly state new funding, and include: Lithuania for pre-school education, the setting up of social teachers and the State Distance Education Programme; Hungary with the financing of the plan for the 'Development of the Education Infrastructure' through funds allocated to the Human Resources Development Operational Plan and with some programmes supported by Phare (the 'School of the 21st century' placing special emphasis on ICT); Bulgaria with some Lifelong Learning projects supported by Phare (renovating institutions for VET, LLL and professional qualification); Malta with the initiative

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<sup>(21)</sup> 25 to 64 year-olds participating in education and training from 3.8% in 2002 to 18-20% in 2006; or 25 to 30 year-olds with university education from 16% in 2002 to 18-23% in 2006.

<sup>(22)</sup> This will have to be confirmed by international measurement as the last statistics provided by Eurostat and the monographs showed, to the contrary, a stagnation or decrease in public expenditure except for Cyprus, Lithuania and Bulgaria.

'Let Me Learn' concerning slow learners; Turkey with funds allocated to pre-school and primary education as well as to non-formal education as part of the 2003 budget; and Estonia with the support given from the state budget to non-formal adult education institutions to support the salaries of the manager and up to three teachers, as part of the 2003 Adult Training Act.

- Redirecting funding is mentioned in Slovenia where funds from the National Budget in 2002 and 2003 are redirected to the objective of increasing participation of adults in formal education, and the tax incentive for individuals undertaking training; in Lithuania where more funds are allocated to quality in education and to the yellow bus programme (with the support of the World Bank); in Cyprus where the HRDA is redirecting funding towards learning in SMEs; in Hungary where a greater part of the Development and Training Fund is allocated to employees training; and in Poland with the teachers' remuneration and career upgrading (see above). In Slovakia, the massive introduction of preparatory 'zero classes' to facilitate integration in basic education for socially disadvantaged pupils (predominantly Roma) should result in important reallocation of funding in the future. Although not mentioned in the reports, the optimisation processes of the school networks undertaken in most countries should also be considered as "redirecting funding" related operations, although 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 the countries that already have training funds set up (Hungary and Cyprus). Thus it is not surprising to see Lithuania, Slovenia and Cyprus in this list, knowing their public expenditure on education reaches 6% of the GDP in Lithuania, 5.6% in Slovenia and 5.9% in Cyprus (EU average is 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**

- There is no real global policy aimed at stimulating private investment in education and public/private cooperation in education. The exceptions are Cyprus where the Human Resource Development Authority (HDRA) engages private investment by co-financing training activities and projects initiated by businesses and private training institutions, to a lesser extent Hungary through the Development and Training Fund which devotes the major part of its subsidies to VET schools, and Turkey which introduced tax exemption for private initiatives aimed at setting up universities and more recently schools. (Romania also foresees a tax exemption for authorised providers as part of the 2002 law on adult education.)
- Although it was not specifically asked in the questionnaire, some countries refer to a significant funding of training courses by individuals (in Latvia 25% of fees in adult education are paid by participants, and this ratio has increased in the last two years, in a context where participation in adult education has increased sharply from 100,000 in 1996 to 210,000 in 2002).
- However, some countries support private operators when they run public education institutions through budget support based on normal standards (Hungary and Slovenia), subsidies given to individuals through a 'voucher system' (Slovenia) or study grants and student loans for higher education (in Latvia since 1997, and also in Hungary and Poland). Others mention the support given to private training institutions through the accreditation processes (Cyprus) or the support given to private companies through the purchase of ICT hardware and software (Malta and Slovenia).

- 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 Public Private Partnerships.

#### 5.d. Examples of Public Private Partnerships in Lifelong Learning

- In total, ICT is probably the sector where Public Private Partnership has progressed most rapidly. It covers ICT courses available to the general public in private schools through, for example the support of the Ministry of Information Technology and Investment in Malta, the support of the Ministry of Informatics for the development of ICT literacy for adults in rural areas in the Czech Republic, the cooperation between public and private funding when equipping schools in Slovenia, Lithuania and Turkey, in delivering ICT courses in Cyprus, or in developing Internet access facilities to a large audience through the Look@World project in Estonia. Moreover, a global partnership is in preparation in Malta with Microsoft.

**GP 18.** In Malta, the Microsoft Corporation and the Maltese Government are in the process of setting up a PPP (Public Private Partnership) with a number of aims including: the latest technological expertise to be made available, an Academy to promote excellence in IT, and an extensive training and development programme.

- Another example is given in Lithuania with the 'Window to the future' project, developed in cooperation among local and central government, telecommunications companies, IT companies and banks, with the view to developing Internet through public access points disseminated throughout the country. Through a network of 100 centres, mainly based in libraries and cultural centres, the project aims at providing 300,000 citizens with basic Internet skills by 2005.
- Other examples of ad hoc Public Private Partnership are present in the Czech Republic with the KRAJ project setting up a Lifelong Learning regional centre (see above), in Slovenia with the first inter-company VET centre set up in 2002 with state and private funding, in Cyprus with cooperation between public and private universities in organising special seminars and other courses, in Turkey with private donations for school constructions, and in Hungary for the future construction of dormitories and other higher education investments.
- Other prominent initiatives come from Lithuania with the support of the Soros Foundation.

**GP 19.** In Lithuania, one of the most overwhelming examples of Public Private 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 million for science and education projects. One of the last programmes implemented in 2002 by the OSFL was mainly dedicated to lifelong learning implementation, for example 'LLL opportunities in Utena region' and 'Drafting of the regional education strategy in Kaishiodoriai region'. The Foundation for Educational Change established by the OSFL in 1999 is motivating activities in the development of the education reform,

modernising the education processes and curricula, implementing various programmes (for example, 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 among other factors, equal opportunities.

**GP 20.** In Slovakia, an example of the successful public/private cooperation 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 to meet on a regular basis.

The first visible step was setting job and graduate profiles based on international experience. The guild paid for visiting relevant countries, such as Germany, France, the Czech Republic and Hungary, as well as studying experiences. The curricula renewal process in cooperation with the 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 have concentrated on preparing 'basic educational documents (BED)' – a formal and administrative expression of the curricular reform. Consequently, the Ministry of Education approved new BEDs for three ISCED 3C training branches coming into force from the start of the 2003/04 school year. 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, cofinanced by the guild, higher territorial units, and hopefully European projects the guild has started to prepare. A training centre for educators will be located in one of these schools. 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 do not 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 future member states<sup>(23)</sup>) which could be interpreted as having less barriers to initial education opportunities. However, as analysed in the monograph reports, the situation for the unemployed and adult population in general is less promising. The lack of appropriate public funds for active labour market measures in most countries prevent them from fighting efficiently against barriers to training and learning, and thereby reduce social exclusion which concerns, in particular, the Roma population and the long-term unemployed. As well, some countries (Bulgaria and Romania, for instance) still have 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 Slovakia report, there are social barriers hampering Roma minority's access to quality education as they are often directed into the special schools for the 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.
- Thus, country reports also mention, as remaining barriers, the lack of motivation for learning on the part of some unemployed and elderly citizens (the Czech Republic, Slovenia and Estonia), and also the lack of learning opportunities for the youth and adult population in rural areas (Turkey and Cyprus), the transportation issues (Lithuania), the difficult access to education for girls (Turkey) and for the ageing population (Lithuania), the

<sup>(23)</sup> Bulgaria, Romania and Turkey.

costs of access to higher education (Hungary and Poland) and to adult training opportunities in the private sector (Estonia), as well as the access issues for the disabled and the disadvantaged.

- As the main measures taken to improve access, many countries refer to the modernisation of the education and training systems, including the introduction of national qualification standards, allowing for recognition of prior learning, promoting transparency, and introducing modular approaches (Hungary, Bulgaria, Romania and Turkey).

In Bulgaria, the MES is an active participant in the elaboration of the International Francophone Agency project on the development of VET in the Central and Eastern European countries. The standards for acquiring professional qualifications and the pilot introduction of bilingual training by profession are in the process of development. The expected results will be related to the recognition of professional qualifications in the European countries.

- Others insist on extending access to the formal system through evening courses, part-time courses and distance education with important initiatives in some countries such as Hungary, Turkey, Lithuania, Estonia, Latvia and Cyprus.

**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 guidance to the students throughout the learning process. Students will be able to work at 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 the mother tongue and communication, mathematics, physics, chemistry and biology. The e-learning module '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 utilised while mastering several specific professions.

- Other relevant policies include the development and modernisation of the counselling and career guidance networks (Lithuania, Romania and Slovenia) with motivation courses provided particularly for the unemployed (the Czech Republic), adequate transportation to schools (Lithuania), specific centres in rural areas (Turkey and Cyprus), loans schemes and scholarships for students entering higher education (Hungary, Poland and Latvia), and the development of private (non-state) higher education institutions in small and medium cities lacking 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 (6.b.) and some references are made at this stage. They refer to elderly people (in Lithuania with the 55+ programme), girls (in Turkey with Vocational High Schools for girls), disabled (Bulgaria), disadvantaged (Lithuania) and prisoners (Estonia). In Latvia, a National Programme was set up in 2001 with the view to promote social inclusion, in particular through measures promoting bilingual education.
- As a tool to increase motivation for learning, Slovenia set up a Lifelong Learning 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, with central events and high representatives of the government taking part. Extensive coverage by the 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, businesses, individuals and learning providers).

### 6.b. Groups at special risk of exclusion

- An important priority at government level is now the Roma population in all countries concerned<sup>(24)</sup>. National policies were set up at the end of the 1990s. With the 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 Bulgaria with the National programme 'From social care to employment', in Lithuania with the programme for increasing employment 2001-2004, and with a special component for job training and employment of the Roma adults in Romania and in Slovakia with the 'zero classes' and the assistant teachers of Roma origin).
- During the past few years as well, activities have been developed 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 (Romania), on basic schools providing a full day programme for socially and culturally disadvantaged children, on multicultural education and support for Roma integration, and a programme for Roma community integration in the Czech Republic (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 some principal strategic aims to 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 other children who express an 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 in Hungary are seen as the 'greatest problem of VET with special emphasis on vocational schools' and an issue which deserves special attention in Slovenia where a special law was passed on a '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 Turkey in agriculture and industry are even more at risk of exclusion. Therefore, specific measures have been taken:

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 retain students exposed to

<sup>(24)</sup> Although surprisingly the Hungarian report does not mention it.



the risk of dropping out in training, and can ensure that they obtain their qualifications. Teacher training is part of this programme.

- The issue of the disabled is mentioned as a priority in almost all country reports (Hungary, Bulgaria, the Czech Republic, Cyprus, Lithuania and Poland) 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 Hungary:

**GP 25.** In Hungary, the Act on Higher Education (Act LXXX of 1993), amended several times and enacted on 1 September 2002, contains provisions for ensuring conditions for facilitating equal opportunities needed for 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 specific funding for the removal of obstacles from the buildings of higher education institutions. These institutions may apply for funding along with proof that they will pay 50% of the cost from their own sources. In 2003 the cost to be provided by the institutions will be reduced to 30%.

- As part of the social integration policies, other programmes cover socially disadvantaged people (Bulgaria and Hungary), students with special needs (Slovenia, Bulgaria and Malta), those living in rural areas (Turkey and Lithuania), women returning to work (Lithuania and Estonia) and children of migrants (Lithuania). In Poland, a special programme has been set up for the benefit of youth at risk of unemployment and social exclusion, and the youth unemployed and disabled:

**GP 26.** In Poland, the 'First work' programme within the framework of the government's Social and Economic Strategy, 'Entrepreneurship – Development – Work', has been working since 2002. The aim is to help young people obtain first-hand professional experience, which will enable them to assess the knowledge and skills acquired at school and will increase their chance of entering the labour market. This programme introduced new instruments and undertakings to improve the professional start of young people. The most important instruments are as follows: (1) allocating grants for the development of academic offices of professional careers and establishing Gmina's Information Centres; (2) providing all secondary schools with the publication 'Occupational guidance kit for the candidates for the certificate of upper secondary school'; (3) dissemination of the manual 'Independence in seeking first job' for running information and training group activities with school graduates; (4) publishing 'Vademecum of best practice' in the form of a series of manuals presenting the most important solutions in the scope of graduate performance; (5) implementation of the project 'Green workplaces' addressed mainly to graduates of forestry secondary schools and children of former workers of state farms. Within the framework of the 'First work' programme from June 2002 to May 2003, 155,000 graduates participated in such active labour market programmes as: traineeships, trainings and subsidised employment. 600,000 graduates received other kind of aid in the form of professional counselling or help from the employment agencies.

- In Romania the integration of students with special needs in mainstream education is of great importance:

**GP 27.** In the past in Romania, too many young people (especially Roma) have ended up in institutions for special needs education for the physically and mentally disadvantaged. 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 the support of Phare. This will result in closing some special needs institutions and converting the best ones into regional centres of expertise. Regular schools will receive training and guidance for teachers, career counselors and adapting the curricula.

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

**GP 28.** The Telecommunication Authority of Cyprus (CYTA), which is a semi-government organisation, offers the programme 'Internet for all' which provides the opportunity to all interested parties to be trained free-of-charge and to familiarise themselves with the Internet. As part of its social contribution, CYTA also provides communication for deaf people through its 'telephone service for the Deaf 1408/1409'. This service is offered on a 24-hour 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 people with disabilities (the deaf, blind and individuals with severe motor disabilities). Those with disabilities are funded to buy their own new technology-related equipment (for example PCs, mobiles, fax machines and so on) through the Self Employment Scheme, which is part of the vocational rehabilitation of the disabled and the scheme for special financial assistance to the disabled individuals for the provision of technical aids and equipment to facilitate their living and employment.

- In Latvia, a Programme of Social Correction was introduced in 1999 for children from risk families, in particular:

**GP 29.** For those young people who are early school leavers, risk children and so on, a Programme of Social Correction has been introduced (*Law on General Education, Paragraph 59, 1998*). The main objective of the social correction classes/schools is to offer programmes of social or pedagogical correction, providing quality education to children from risk families or juvenile delinquents, for example. According to legislation, any school has a right to open a class of social correction for children who need social or pedagogical correction. All schools that offer a programme of social correction must guarantee the afternoon classes for individual work with the pupils concerned.

### **6.c. Participation in Lifelong Learning of young people not covered by the formal system**

- Acceding countries have recently set up policies dedicated to young people outside the formal education system. It concerns the young unemployed, as well as 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 the young unemployed into the labour market is promoted in Lithuania, the Czech Republic, Latvia and Cyprus through different schemes.

**GP 30.** In Cyprus the HRDA provides training opportunities to young people leaving school without skills. They can participate in the following initial training programmes: *Multi-company accelerated training* – mainly addressed to school leavers and unemployed adults seeking employment in occupations where there are labour shortages. They are organised by the 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* – organised by businesses 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 six or 12 months.

**GP 31.** 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 qualifications into the labour market within six months. The programme includes carrier planning elements and participation in active labour market measures, for example participation in supported works for gaining practical skills, short-time training courses for narrow specialization and so on.

- Participation in local community activities, socialisation, 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 the Czech Republic through the government's adoption of the Policy for Children and Young People (to run until 2007), through the Youth for Community (2000) and Youth for Village (2001) programmes and also through a Programme on Socialisation of Children and Youth adopted in 2002 in Lithuania, through activities of local youth councils in Slovenia and through the activities of the Labour Corps Ochothnice Hufce Pracy (OHP) in Poland. This often made use of the EU Youth programme (Estonia). These types of measures often involve cooperation between the ministries of education, labour, health, interior and social affairs. Another initiative is the creation of a Chamber for Young people in the Czech Republic 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 dropouts, such as in Malta and Cyprus<sup>(25)</sup>, or a network of 'open education' institutions, including the 'Open Education Society Learning Centre' project in Turkey, and even a second chance school in Malta.
- Finally, the Czech Republic initiated in 2002 a programme aimed at providing financial support for projects designed to promote international exchanges of children and young people.

<sup>(25)</sup> This does not seem to be appropriate as, according to the monograph on Cyprus, the quality of the apprenticeship system is rather poor.

#### **6.d. Ageing population**

- Lifelong Learning activities concerning the ageing population have also been considered by some countries during recent years. Particularly in Lithuania with a specific programme in 2002 addressing the long-term unemployed and including pre-pension aged people with low qualifications, and in 2003 with the '55+' programme addressed at senior citizens with the aim to better facilitate their re-integration into the labour market.
- In general, many countries cite the creation various kinds of educational and training activities for all ages in normal settings. Some examples carried out through specific arrangements, such as evening courses, distance education (as proposed in Bulgaria), as well as a mention of the Open University project in Cyprus.
- In addition, some third age universities provide elderly people with a variety of training courses (the Czech Republic, Slovenia, Poland, Malta and Slovakia).

#### **6.e. Counselling and guidance services**

- The monograph reports saw 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 also seen as poorly prepared for the challenges of a rapidly changing labour market and Lifelong Learning.
- In general, the country reports mention only few recent initiatives in that field and, as stated by the Hungary report: "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 Lithuania in 2002 with creation of two youth job centres, a general support of the Internet for 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, the objective of a 2001 Phare programme is a general upgrading and technical modernisation of the vocational guidance system. In 2003 Poland introduced the idea of the school professional advisor into the pedagogical practice. Also in Slovenia several projects are ongoing in the context of the Socrates and Leonardo da Vinci programmes, and an important initiative was taken recently with the 11 centres for guidance and consulting for adult education (see above 2.a.) with the intention of soon being multiplied with the support of the ESF. In Romania, the provision for counselling and guidance is seen as developing quicker than the demand. Latvia reports on the creation of the Professional Guidance Information Centre with the support of the 2000 Leonardo da Vinci programme. Hungary reports on active developments of career orientation and counselling in higher education, and Cyprus indicates the reinforcement of its network by the establishment of the National Resource Centre for Guidance. Finally, Slovakia 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 in the Bulgaria 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 summarises 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 communication between educational institutions and in particular the labour market. As noted also in the Bulgaria paper, this does not prevent young people from continuing further studies through rapidly increased enrolment in higher education which demonstrates an appetite for learning. However, this increased enrolment in HE is also the result of the high rate of unemployment for young people who only have secondary education qualifications.
- Therefore, promoting positive perceptions of learning has to come first from the continuous improvement of the education system and in particular from the initial VET system through better adaptation to labour market needs, but also from a stress on developing a diversified, flexible and quality non-formal education system, which is still largely missing in most countries. The positive perception also has to come from the acknowledgement of the value of learning, as in the public sector in Hungary (2002):

**GP 32.** In Hungary, one of the most important measures of the new government that took office in 2002 to indicate an acknowledgement of the value of learning was to raise the minimum wage of those holding a degree in the public sector to HUF100,000, which is twice the value of the mandatory minimum wage.

- Other incentives are used in Slovenia with prizes being awarded to school pupils through competition between classes or schools. These include special certificates given to the best craftsmen by the Chamber of Crafts, and awards 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 at a regional level. The initiative has been widened to include Slovenes living outside national boundaries and reading in foreign languages (English, Italian and German).

- Moreover, other initiatives in the past few years include: the presentation of national education and training strategies to, and public debates with, a wider audience through conferences (Malta and the Czech Republic); forums (with the example of the Lithuania National Forum and regional forums set up as a follow-up of the Dakar Summit); a yearly learning festival (Slovenia); special fairs and adult education weeks (the Czech Republic, Slovenia, Lithuania and Estonia); educational TV networks (Malta and Poland); and ministerial web pages (Turkey).
- Another important measure is involving parents by working with them to promote positive perceptions of learning in general (Lithuania), or to support girls’ participation (in the Turkish Vocational High Schools for girls), or even to involve them in the management of

the education system as reported in Hungary:

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 be 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 organised 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 Cyprus 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 outside the most crucial issues for the development of Lifelong Learning systems. This was recognised as a priority by the future member states during the consultation process on the memorandum in 2001. But progress is slow. According to the Slovenia 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 the Czech Republic, Malta, Romania, Cyprus, Turkey, Estonia and Lithuania, and still under reflection in Bulgaria. The ongoing development of national qualification frameworks is already a basis for the recognition of non-formal and informal learning in VET programmes in Slovenia and Hungary. Malta 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 it is possible in adult education to recognise 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 have been taken, such as in Lithuania where the responsibility for assessment of acquired qualifications for vocational students has been transferred 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 (Malta, the Czech Republic, Turkey and Lithuania). They generally go through inspection process by inspectors or ministry staff.
- In addition, self-assessment procedures for education institutions are promoted in Malta, Slovenia and Lithuania. In Slovenia, 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 the development of quality assurance systems in many countries, mainly through setting up National Accreditation Agencies for adult education (Hungary, Bulgaria<sup>(26)</sup>, Romania and Estonia<sup>(27)</sup> in particular, and Poland for higher education) with the view to regulating and improving the quality of the developing non-formal system.
- In Slovakia a National Programme on Quality 2004-2008 is also under preparation.
- As far as Lifelong Learning strategies are concerned, only the Czech Republic report mentions the regular annual report carried out by the Minister of Education to the parliament.

### 8.b. Reviewing strategies regularly

- In relationship to the lack of integrated Lifelong Learning strategy, there are no central mechanisms reviewing them regularly, possibly with the exception of Cyprus where the planning bureaux play such a central role at government level.
- However, the strategic plan for education in the Czech Republic, Lithuania and Malta are regularly reviewed through dedicated systems internal to the relevant ministries. Other countries refer to the annual presentation of ministries' activities to the parliaments (Slovenia and the Czech Republic). In Estonia, the National Council of Adult Education plays a certain role in setting priorities as well as making assessments. In Slovakia, the Slovak Governance Institute is a platform for systematic reflection on policies in the education and social sector.
- Turkey and Lithuania have developed research activities linked to reforms in education and set up a specific commission (Lithuania) and a specific database (Turkey) accessible to all through the Internet as a communication tool to provide external assessments by consumers.
- Finally, Lithuania mentions participation to international studies, such as IALS and TIMSS, while Poland makes reference to PISA.

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<sup>(26)</sup> In Bulgaria, it is part of the NAVET (National Agency for VET).

<sup>(27)</sup> In Estonia, a National Qualification Authority was established in 2001.

## Annex

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

## INTRODUCTION

In its resolution of 27 June 2002 on Lifelong Learning<sup>(28)</sup>, 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'<sup>(29)</sup>, 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 cooperation 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. Future member states 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 the member states, future member states 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 2000<sup>(30)</sup>. This consultation resulted in the Commission having access to extremely useful information on the views and perspectives on Lifelong Learning from member states, future member states 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.

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<sup>(28)</sup> Council Resolution of 27 June 2002, no. 2002 163/1, OJ C163, p. 1.

<sup>(29)</sup> COM(2002) 678 final (November 2001).

<sup>(30)</sup> SEC(2000) 1832, of 30 October 2000.



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

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

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# QUESTIONNAIRE

## ON THE IMPLEMENTATION OF LIFELONG LEARNING BY MEMBER STATES

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

### I. GENERAL FRAMEWORK

1. Describe the legislative and financial framework in which Lifelong Learning strategies are implemented in your country. In the case of regional governments or decentralised decision-making, please detail the responsibilities of the different levels of government in this process.
2. Describe how your government ensures effective coordination 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 in 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 redirected 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 Public Private 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 system 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, programmes 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.)?