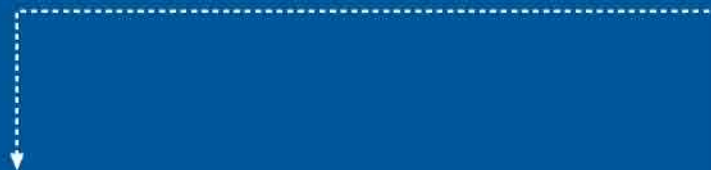




critical factors for realisations of Lifelong Learning

A comparative action-oriented European perspective (2007)



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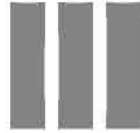
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critical factors for realisations of Lifelong Learning

A comparative action-oriented European perspective (2007)

The present report is the result of collaboration within the Working Group on Lifelong Learning of the Transnational Partnership CEMA-NET in the framework of the EQUAL / ESF initiative. The collaboration lasted between July 2005 and June 2007 and involved the representatives of the national development partnerships from six countries: Austria, France, Germany, Italy, Poland and Slovakia. (An integral part of the report is constituted by its Executive Summary.)

Thus, the present report and its Executive Summary reflect solely the ideas, concepts and opinions of the members of Working Group on Lifelong Learning of the transnational partnership CEMA-NET, and not necessarily those of their home institutions, the EQUAL initiative, the ESF or the European Commission in general.

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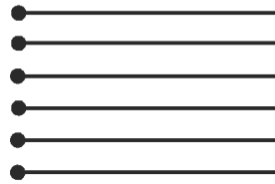
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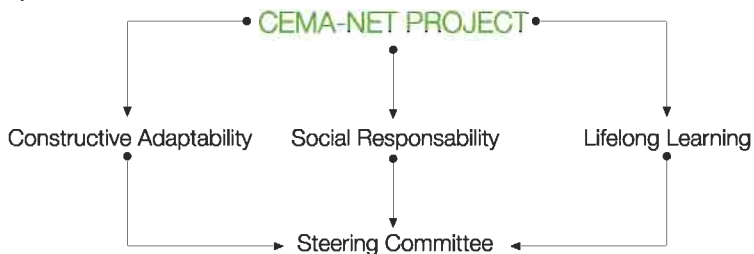
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presentation

In March of 2005, eight national partnership organizations of equal projects in the frame of the Equal second round decided to participate together in a transnational partnership called “Constructive Employability and Adaptability Network” - **CEMA-NET**. This partnership is integrated by national projects from Austria (Gesundes Gesundheitswesen), Denmark (Bussines House), France (Alter Action Insertion), Germany (ZIP), Italy (Varco), Poland (Renowator), Slovakia (OZ Institute Zamestnanosti) and Spain (Àncora), with the objective of sharing methods of promoting diversity as a powerful resource of workforce.

To achieve this objective a Steering Committee and three working groups on the topics of Constructive Adaptability (CA), Social Responsibility (SR) and Lifelong Learning (LLL) were established. The three working groups were constituted with the aim of sharing methodologies and tools that allow improving the integration on the labour market of the groups with more difficulties in every territory, mainly workers in small companies. The Steering Committee is in charge of the follow-up and evaluation of the activities of the described groups of work.



The results of the work from them are gathered in three publications:

“Constructive Adaptability: Concept and good practices in CEMANET project” is the result of the work developed along this time by the Constructive Adaptability Working Group members. Through it we present you CA Working Group (background, objectives and transnational partners involved) and the results of our cooperation (common definition of Constructive Adaptability and tools applied in the different projects linked to CA concept).

“Social Responsibility concept in the frame of the CEMA-NET countries”. The Social Responsibility (SR) Working Group exposes the general situation on this topic in the countries participating in the CEMANET project. This work that we present contains several definitions, tools and application standards for social responsibility in Europe. Moreover, several CEMANET partners describe different SR experiences carried out by some enterprises in their respective countries.

“Critical factors for realisation of Lifelong Learning. A comparative action-oriented European perspective” is a report developed by the Lifelong Learning Working Group. It includes basic notions about Lifelong Learning, accounts dealing with the national perspective of Lifelong Learning, a common perspective and a framework for consideration and some conclusions and recommendations.

We hope this information will be useful for the organizations that are working to promote an equal labour market.

Members of CEMA-NET project



popular wisdom on Lifelong Learning

Lifelong Learning

Wisdom on

popular



Człowiek uczy się całe życie

A man learns whole life long

(a popular Polish expression, used in many different circumstances)

Apprendre tous les jours

To learn every day

Man lernt nie aus

You cannot learn to the bottom

Learning is like rowing against the stream

As soon as you stop you drift back

(Benjamin Britten)

Sobald man in einer Sache Meister geworden ist, sollte man in einer neuen Schüler werden

As soon as you become a master in a thing, you should become a pupil in another one

(Gerhard Hauptmann)

It is no disgrace not to know anything, but not to want to learn

(Socrates)

Learning is like an ocean without a bank

(Confucius)

If an old person dies, it is like a whole library burning down

(African proverb)

Education is not the filling of a pail, but the lighting of a fire

Non scholam sed vitam discimus



introduction



Introduction

The present document arose from the exchange of experience, discussion, debate and joint work of the international working group on Lifelong Learning within the transnational partnership CEMANET, established in the framework of the EQUAL programme of the ESF. The discussions, exchange and work, leading, in particular, to the preparation of the present document, started in late 2005 and ended in mid 2007.

The Working Group consisted of the representatives of various EQUAL/ESF projects from six European countries: Austria, France, Germany, Italy, Poland and Slovakia. Although the composition of the group has been somewhat changing, it was relatively stable. The list of members is provided in Attachment 1 to the document. Then, Attachment 2 lists the projects, whose representatives were the members of the Group, along with the institutional composition of these projects. These two lists show the mix of both competence and experience, forming the assets of the Working Group.

The present report is, on the one hand, a straightforward *documentation* (or at least its main body) of the work done while the Working Group has been active, and on the other hand, a kind of *compendium* on understanding and development perspectives, prepared with a view on having a reference device, to be used in any further collaborative work, envisaged by the respective partners, as well as against a broader background.

Thus, the report starts with the chapter containing the account on the *understanding of the basic notions*, the very Lifelong Learning being the first one. This understanding does not only encompass the semantic meaning, but the policy-oriented meaning and consequences as well. The reference is made, in a particular manner, to the understanding and its consequences as valid on the European level. Some place is devoted to the historical perspective, and to the distinctions concerning the “driving forces”, “models”, “reasons” or “motivations”, especially at higher levels (why should one support

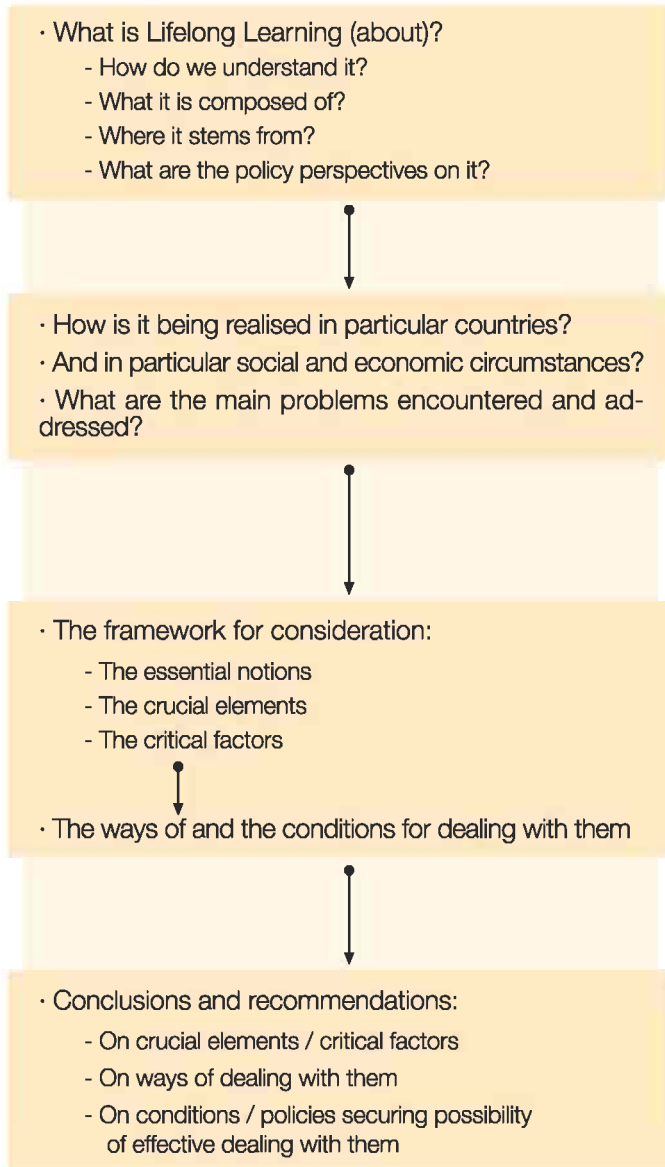
Lifelong Learning in general and its particular infrastructures in particular?).

Then, the second chapter presents a number of accounts dealing with the *national* (or – partly – project) *perspectives* on Lifelong Learning and its partial, specific problems and opportunities. Attention should be paid to the diversified character of these accounts, stemming both from different national experiences and perspectives, and from different nature and contents of respective projects. Yet, they provide, together, an ample and relatively comprehensive overview of the different circumstances, in institutional, social and political terms. The chapter ends with a summary, in which an attempt was undertaken of a concise presentation of the various perspectives and experiences on the national levels.

The third chapter goes a step forward in trying to provide the *common perspective and a framework for consideration*. It concentrates on an elicitation of the component parts making up the domain of Lifelong Learning (taking, in particular, the form simplified form of a “matrix” of actors, subjects, and process stages), accompanied by the identification of the focal points, the *crucial issues and notions*. Thereby, we get closer to the “critical factors”, mentioned in the title of the document. Against this background the actual experience is reported from selected national projects, with emphasis on the way of dealing with the crucial issues (and thus the “critical factors”), the methods that worked and things that failed.

Finally, the document ends with the chapter dealing with *conclusions and recommendations*. These concern, first, the conviction as to the most important elements in the Lifelong Learning domain, both in the sense of components and conditions (crucial elements and critical factors). Then, the issues (mainly problems and difficulties) associated with these elements are summarised, along with the explanations concerning the respective mechanisms and the forms, in which the issues arise. Finally, the ways, in which we can deal with the issues, and the policies meant to secure the appropriate conditions for dealing with the issues, are presented.

The logical structure of the entire report is also presented on the diagram below.



The present document is addressed at:

- The community constituted by the participants of the CEMA-NET Partnership, which means also the extensive network of national institutions, involved in the Partnership, either directly or indirectly.
- The broader community of institutions involved in the processes and infrastructures of Lifelong Learning, especially those functioning within the European framework.
- The policy makers and the persons responsible for carrying out relevant programs on the European, national, regional and local levels; this applies in a particular manner to the conclusions and recommendations part of the document.

Now, in a nutshell, the conclusions and recommendations will be presented, which are provided and commented upon in a more detailed manner in the final chapter.



conclusions and recommen dations

conclusions
and
recommen
dations



Conclusions and recommendations¹

Lifelong Learning can be understood as an *objective process, which takes place*, in a variety of manners and with different intensity, *in the lives of all people*.

It can also be perceived as a *conscious activity* of the individuals, *aimed at gaining maximum out of this process*, under the concrete existing conditions.

Finally, it can constitute a *policy perspective*, aimed at *creation of the possibly most conducive conditions for the conscious realisation of Lifelong Learning activity* of the individuals, notwithstanding the broader (social, economic,...) purposes of this activity.

The present summary addresses all of these, with emphasis, though, on the last aspect of Lifelong Learning.

1. The critical factors, as formulated below, are "negative", that is: presented as negative phenomena, *barriers, gaps or shortcomings*, which ought to be somehow overcome. They are related, first, to the situation of an individual, or a definite group, and then to the characteristics of the providers, that is – the educational, training, coaching, etc., organisations and institutions. As such, these critical factors can be seen as "specific" or oriented at the micro-level, not implying, at least directly, at this stage, any more general and policy-related conclusions nor action types. It should be emphasised that *lack of intrinsic motivation* was considered to be by far the most important negative critical factor of all.

Critical factors concerning learners and providers

Lack of intrinsic motivation

Lack of time and money: critical financial situation and insufficient time resources of the individuals

Lack of awareness on the side of the learner as to the existing learning possibilities

Lack of habit and culture of organising oneself individually and/or in a group (habit or culture of dependence on outside institutions)

¹ This section, both here and at the end of the report, was formulated without contribution from the Italian Partner.

Critical factors concerning learners and providers

Lack of personal responsibility (both deciding and bearing of decision consequences is left to others)

Blocking or traumatic life events, like, for example, being fired after a long period of stable employment

Neglecting and ignoring intercultural differences in general (on the side of providers)

Disinterested and unprofessional managers, decision makers (e.g. lack of recognition of the need to learn) and teachers

Insufficient access to learning opportunities in other terms than mentioned above (potential learners are offered the learning possibilities that are too narrow, too selective and too distant, as well as subject-wise ill-adapted to the demand from the learners)

Different individual learning strategies, actual and potential, not being recognised from the side of the learning providers

Neglecting the existence of critical factors

It is the necessity of dealing away with these critical factors that gives rise to various “instruments”: methods, techniques, institutional and organisational solutions, as well as policies at various levels, which are all oriented at securing an effective and efficient realisation of the Lifelong Learning processes for the individuals and within the society at large.

The next section of conclusions presents, therefore, the most direct, pragmatic approaches that help in dealing with the critical factors, named here the *ways of coping*.

2. Conform to the sense of the *critical factors*, outlined before, the **ways of coping**, presented here, address those factors most directly of all the potential instruments deployed further on here, and so we are at this point still at the micro-level, with, however, some implications of a more general nature.

Ways of coping (dealing with the critical factors)

Offering flexible modules adapted to the time budgets of the learners

Providing help for self-evaluation and reflection

Learn-guidance, acting as a coach, not (only) as a teacher

Focusing on competences and qualities, rather than on the “weak” points

Giving appropriate possibilities to act autonomously

Giving individuals the responsibility to make own choices of the career path (empowerment)

Learn to understand change management and be able to manage changes

Secure supportive learning environment and setting

Secure support for and adequate payment of teachers and scientists (content-providers)

It is natural that these ways of coping are addressed primarily at the immediate providers and the institutions responsible for organising the Lifelong Learning processes. Here and further on the formulations are of the “positive conditions” for the proper course of the Lifelong Learning processes.

3. The **support necessary**, as stipulated here, is formulated in quite general terms, and refers primarily to the “external” practical conditions necessary for the success of the Lifelong Learning processes, even though some of these conditions are quite broad and far-reaching.

Support necessary

Secure an effective, transparent and formally acknowledged modularisation

.....

Support necessary

Provide adequate support to cooperation in interdisciplinary teams ("trans-disciplinarity")

Provide for the equal opportunities and free access to knowledge in general for each individual (equivalent to conditions on adequate infrastructure, flexibility, broad offer)

Offering trainings in leadership and motivation instruments to create good working atmosphere and motivate employees. For this, it is necessary to implement the institutionalised feed back processes

Develop a positive model image and a guiding philosophy of continuous education to be implemented by families, school and authorities

State-governed, but open to all kinds of formally acknowledged Lifelong Learning offer, web-sites with information about learning and formation possibilities, free of charge information on the subject

4. Given the recognition of the enormous role of the **social network**, forming through family, kin, neighbourhood and peer relations the conducive or discouraging background for the actions of any individual with respect to Lifelong Learning, any "outside" activity (support, policy, etc.) to be undertaken has to account for this role and the possibilities of shaping it.

Social network (conditions based on the potential positive and negative influence of the social network on the individuals)

Acceptance of idealism and a specific personal orientation

Support for social recognition and enhanced identification

Improved exchange between professionals, including exchange of best practices and promotion of free access to all individuals

Help to networking oriented at improvement of intensity and quality of social networks

.....

Social network (conditions based on the potential positive and negative influence of the social network on the individuals)

Work-life-balance: provision of good infrastructure for combining private and work life

Generally: recognition that family, community and peer-groups with their social and cultural background can significantly influence individuals in a positive or negative way

5. Policy mix: this is the crucial section, dealing with explicit *recommendations*, as it addresses the potential instruments, operated on the policy level, whether European, national, or of local administration.

The proposed policy mix, forwarded here, encompasses various kinds of instruments, applying directly to the educational sphere (the internationalisation of certificates, the advanced modularisation and validation), but also to the joint social and fiscal instruments (social insurance “bonus” schemes, social assistance emphases, tax reductions for realised continued training and education, etc.), to the regulations concerning employer-employee relations (including labour law), the media and political involvement and the mobilisation of actors engaged in the Lifelong Learning processes, down to the explicit use of ICT and the additional capacities these technologies offer.

The items appearing in the policy mix below constitute an attempt at summarising the instruments that should secure the fulfilment of the conditions formulated before under the *ways of coping*, *support necessary* and *social network* headings.

Policy mix

EU support for the requirement of an English/international version of certificates

Broad and detailed modularisation / certification (e.g. Bologna process and its extensions)

.....

Policy mix

Install and enhance the competence verification communities (related to chambers, associations, boards, trade organisations, etc.)

Lifelong Learning educational bonus. A part of social insurance premium diverted to the possibility of learning over entire life span, with open choice of the way of using it within the certified set of institutions and specialisations

Direct positive policy actions toward social network institutions (family, neighbourhood, community, school...), e.g. social aid extended and reinforced in case of continued education, orientation of social work towards education rather than upkeep, counselling towards the use of Lifelong Learning bonus (see above), etc.

Support learning through public media campaigns (positive image of Lifelong Learning)

Sustainable promotion of Lifelong Learning projects and stable position of opinion-leaders in politics

Secure the means and methods (including ICT) to identify and use in practice the competence profiles of the employed / unemployed

Set up and maintain broad educational offer websites, with the capacity of interactive use and search for an own path, including employment possibilities, financing schemes and further education perspectives

Top-down and bottom-up strategies: securing that both decision makers and employees are integrated in the change processes

Promoting preventive health programmes in companies, schools and other organisations

State support for employees and corporate actors for education (e.g. tax reduction) paying for further education courses

Law applying to employers, guaranteeing the participation of employees in further education (graded, depending upon the employer's capacities,

Policy mix

and encompassing various instruments: working time, paid leave account, paid training, contracts between employees and employers, etc.). These should in particular account for the SME sector

Commitment of all social partners for new political strategies concerning Lifelong Learning

Promotion and facilitation of flexible time-work models (with the use of the ICT, in particular)

Promotion of work life balance and corporate social responsibility

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**what
is Lifelong
Learning
about?**

what
is Lifelong
Learning
about?



1. What is Lifelong Learning about?

1.1. The European understanding and perspective

What is Lifelong Learning?

"When planning for a year, plant corn.

When planning for a decade, plant trees.

When planning for life, train and educate people."

Chinese proverb: Guanzi (c. 645BC)

or, perhaps, even more efficiently:

motivate people to and provide them with the opportunities to learn?

...from a European point of view?

On 21 November 2001, the Commission adopted a Communication on Making a European Area of Lifelong Learning a Reality. This Communication was jointly presented by Commissioners Reding and Diamantopoulou as a response to the mandate from the Feira European Council "to identify coherent strategies and practical measures with a view to fostering Lifelong Learning for all". In doing so, it makes an important contribution to achieving the strategic goal set at Lisbon for Europe to become **the most competitive and dynamic knowledge-based society** in the world.

The scale of current economic and social change, the rapid transition to a knowledge-based society and demographic pressures resulting from an ageing population in Europe are all challenges which demand a new approach to education and training, within the framework of Lifelong Learning.

In the context of these challenges, Lifelong Learning was given high priority at the Council meetings of *Lisbon* and *Stockholm*, and the Communication mentioned above responds to the specific mandate of the Feira European Council.

Lifelong Learning is defined in the Communication as:

"all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competence, within a personal, civic, social and/or employment-related perspective." (see also *Memorandum about education and Lifelong Learning. Brussels: European Commission, 30th October 2000, SEC (2000) 1832*).

Lifelong Learning is therefore about:

- Acquiring and updating all kinds of abilities, interests, knowledge and qualifications from the pre-school years to post-retirement. It promotes the development of knowledge and competences that will enable each citizen to adapt to the knowledge-based society and actively participate in all spheres of social and economic life, taking more control of his or her future.
- Valuing and developing all forms of learning, including: formal learning, such as a degree course followed at university; non-formal learning, such as vocational skills acquired at the workplace; and informal learning, such as inter-generational learning, for example where parents learn to use ICT through their children, or learning how to play an instrument together with friends.

Learning opportunities should be available to all citizens on an ongoing basis. In practice, this should mean that citizens each have, available and realisable, individual learning pathways, suitable to their needs and interests at all stages of their lives. The content of learning, the way learning is accessed, and where and how it takes place may vary depending on the learner and the learning requirements.

Lifelong Learning is also about providing "second chances" to update basic skills and also offering learning opportunities at more advanced levels. All this means that the formal systems of provision need to become much more open and flexible, so that such opportunities can truly be tailored to the needs of the learner, or indeed the potential learner.

The above results directly from the information published on the site "European Union on line", heading Education/Implementation of the policies. Brussels: European Commission: Education/Training throughout the life.

Side by side with the normative or "stipulative" definition of what Lifelong Learning is or should be, formulated mainly for pragmatic and administrative rather than cognitive, purposes, there are the real-life processes, which are observed, registered, facilitated, motivated,

or to the contrary. These processes refer to the (formal) educational system and its effectiveness, the ways to cope with problems such as the drop-outs, the social embedding of the Lifelong Learning, particularly based upon the family and neighbourhood networks and the related informal learning mechanisms, the level of corporate social responsibility for the employability of own staff, and the cultural background, including the value attached to education, and to self-improvement, as well as the more general patterns of life cycle and the roles played at various ages.

This amounts, in the empirical and behavioural perspectives, to the realisation and therefore also to the “life-determined” definitions of what Lifelong Learning actually is.

This report will look at the issue of the Lifelong Learning and its implementation from both kinds of perspectives here mentioned.

1.2. An historical perspective on Lifelong Learning and the issues therein

During the 1960s, a discussion of permanent education as an educational opportunity against illiteracy began on an international level.

The Lengrand report and the Faure report, “Apprendre à être” (“Learning to be”), known more broadly as the Strategies for Education Report, were elaborated and analysed in the framework of development of the educational policies of national states so as to underline the operative and cultural strategies for permanent education.

In 1996-97, with the communication from the European Commission, the strategy was confirmed by the European Union to favour formation for everyone, with an end of promoting personal development and active social inserting of citizens. The publication of the Memorandum on education and permanent formation was a response to the need of creating an economy and a society based on knowledge and finding the right conditions for new and full occupational levels in the working world.

1.2.1. Continuous adaptability of firms and employees

The strategic objectives of “Lifelong Learning” include, at the “technical level”, promotion of inclusive working practices and adaptability tools like work/life balance and the use of ICT. In this context, focus should be both on innovative approaches to help develop higher level skills and to ensure that the “Lifelong Learning” strategy is able to engage those with lower level skills to ascertain that they are not disadvantaged in the world of work.

Another important issue to be addressed is to encourage more women into skilled occupations. The gender issue can be tackled in two ways. Firstly, by promoting a positive image of “Lifelong Learning” and related skills to women in the workplace. Secondly, to get employers to recruit from non-traditional labour pools, and put in place employment practices that support the needs and interests of women and allow them to pursue career goals while balancing work/life responsibilities.

At the Lisbon European Council in March 2000, Europe’s leaders committed themselves to an ambitious strategy for a broad-based and far-reaching economic reform. The vision agreed at Lisbon was of a dynamic job-creating Europe that delivers on both economic and social objectives to become the leading knowledge-based economy in the world. The move towards a knowledge-based society underpinned the whole Lisbon strategy. This strategy has beyond any doubt an intimate relation to effective implementation of the Lifelong Learning possibilities and practices.

The Employment Strategy set by the Council acknowledges the new opportunities that are being created by the knowledge-based economy, but also warns that taking advantage of these opportunities requires an adaptation of work organisation and a contribution to Lifelong Learning by everyone. The European Employment Guidelines² state that “*Member States will implement Lifelong Learning strategies ... to equip all individuals with the skills required for a modern workforce in a knowledge-based society*”. The conditions for giving every worker the opportunity to achieve “information society literacy” would be established in this context.

² Council Decision of 22 July 2003 on guidelines for the employment policies of the Member States (COM 2003/578/EC). Guidelines available at: http://europa.eu.int/comm/employment_social/employment_strategy/guidelines_en.htm

The European Council of 2004 underlined the urgency for progress towards achieving the Employment Strategy objectives. EU progress towards the Lisbon Strategy 2010 target of a 70% overall employment rate has come to a standstill and it has become then clear that the EU would also miss its interim target for 2005 of 67%. With this in mind, the Council set up an “Employment Task Force”, which reported in 2004; and agreed on a new set of sharper, country-specific Recommendations for 2004 which build upon the recommendations of the Task Force. The 2004 Recommendations feed into the mid-term review of the Employment Strategy in 2005. Investing in human capital and Lifelong Learning is a key strand of the new recommendations requiring member states to *“Develop innovative learning and training methods (such as e-learning) and invest in skills related to new information technologies”*³.

The eEurope 2005 Action Plan⁴ – endorsed in January 2003 – is a central element of the strategy to transform the European economy. The 2005 objective was that Europe should have modern online public services (e-government, e-learning services, e-health services) and a dynamic e-business environment and, as an enabler for these, widespread availability of broadband access at competitive prices and a secure information infrastructure.

The Commission has recently outlined the strategy going beyond 2005, up to 2010, in a communication on “Challenges for Europe’s Information Society beyond 2005: Starting point for a new EU strategy” – adopted in November 2004.⁵ This communication highlights the need to step up research and investment in ICT’s and focuses on the role of ICT in skills and work. An eEurope Advisory Group has also been set up to provide strategic advice on the future of eEurope plans.⁶

1.2.2. Key challenges

The CEMA-NET Lifelong Learning Working Group’s objective is to identify the critical factors of implementation and success of the Lifelong Learning initiatives and of the overall process. These relate to various domains of education, social life, corporate behaviour, and administrative undertakings. Based on the analysis of these

³ Recommendations for 2004 available at:
http://europa.eu.int/comm/employment_social/employment_strategy/recomm_en.htm

⁴ eEurope Action Plan 2005: http://europa.eu.int/information_society/eeurope/2005/index_en.htm

critical factors the conclusions and recommendation referring to concrete actions are formulated.

The conclusions and recommendations formulated will therefore be largely equivalent to sketching a strategy for:

- Developing advantageous conditions for the general increase in the intensity and effectiveness of the Lifelong Learning processes.
- Driving up the skills of the current and potential workforce, in particular - by building on EU recommendations.
- Fostering links between education and business, ensuring that all employers invest in the skills of their employees.
- Developing a workforce with advanced know-how, and
- Securing that the process shall develop and persist in the future, rather than just being a one-time effort deemed to wither away.

The EU will be a driving economic power in the next future only by ensuring that employers have the skills to support the success of their business, and that employees have the necessary skills to be both employable and personally fulfilled.

It has been years that the European commission has occupied itself with Lifelong Learning in order to favour formation and evolution, the development of the active inserting of citizens for a permanent education as a new opportunity to fight illiteracy.

The publication of the report on the strategies of education, the Memorandum on instruction and permanent formation have answered the need to build an economy and a society based on knowledge and conditions for the new possibilities in the working world.

In March 2005 the European council re-launched the Lisbon strategy clarifying political priorities and affirming that human capital "is the most important resource for Europe", necessary to bring competitiveness of Europe on a par with respect to the largest industrialized economies (United States and China).

⁵ "Challenges for Europe's Information Society beyond 2005: Starting point for a new EU strategy" 19 November 2004 available at:
http://europa.eu.int/information_society/eeurope/2005/all_about/2010_challenges/index_en.htm

⁶ Details of the eEurope working group available at:
http://europa.eu.int/information_society/eeurope/2005/all_about/advisory_group/index_en.htm

In the main points that sustain the European strategy, the renewed strategies of Lisbon, the new treaty for stability and growth, the European council (March 2005) has focalized the process of Lisbon on the growth and occupation concentrating on ten points of action, the ninth dedicated exclusively to the politics of education and formation.

1.2.3. Small business Initiatives

Some of the national partnerships forming the CEMA-NET work in partnership with small and medium enterprises (SMEs). Therefore, CEMA-NET must constitute an opportunity to exchange information and examples of best practice with each other whilst simultaneously engaging on issues to do with skills and learning. These involve such topics as:

- Widening participation.
- Workforce development.
- Exploitation of new technologies.

With emphasis on:

- Different approaches for various age ranges and subjects.
- Wider dissemination of established best practice in teaching literacy, numeracy and ICT.
- Management of increasingly individualised learning.
- Using ICT imaginatively to enhance learning for all.
- Addressing the actual state of the labour market and the current needs of employers, and establishing the mechanisms securing this for future.

While it is obvious that the SME sector, along with the sub-sector of the self-employed is one of the keys to the success of any strategy aimed at Lifelong Learning and knowledge society, it is also clear that it is exactly this sector that requires special policies and support, if not “care” with respect to the implementation of the Lifelong Learning. This is due, on the one hand, to the usually quite limited

financial and other resources at the disposal of the SMEs, necessary for effective Lifelong Learning of either the owners, managers or the employees. On the other hand, the realisation of Lifelong Learning within the SMEs is largely dependent upon the local social and economic background, which may be highly differentiated with this respect. That is why of special importance become novel approaches and use of new technologies, which may improve effectiveness and efficiency of Lifelong Learning in various settings, formal and informal, including those of the SMEs.

1.2.4. New approaches and technologies

Besides the traditional formation approaches, based on the transmission of knowledge, techniques and consolidated values, on-line formation is starting to affirm itself, using telematic technology, allowing for creation of a virtual community of learning that reproduces the communication dynamics of classroom formation. The interconnection of networks between actors and their constructive interaction have given way to a trade. The formative contract between professors and users assumes new significance on a psychological level, because of communication and interactive means that are modified by the mediation of psychological support.

The professor's job is to motivate the users and this assumes an interfacial role between the environment and the participants that should be helped in order to surpass the inevitable problems in front of the formative virtual setting sometimes very little familiar.

The other fundamental figure is the one of a tutor, a reference point and mediation with other actors involved in the virtual community, as well as with texts and with the very process of learning. The tutor becomes a guide for participants, meant to help and orient them, to access the resources and to get involved in formative activities, support and facilitate actions for cooperation and collaboration. The role of tutor on-line is used in order to facilitate the motivation for learning collaboration, and to simplify the interaction on the inside of the group that will bring about the construction of social interaction and knowledge.

The Tutorship must:

1. Facilitate and motivate the recognition of useable resources.
2. Provide motivational and affectionate scaffolding, encouragement, help and approval.
3. Facilitate orientation, by means of reaching objectives and creation of paths to follow.
4. Promote the communication exchanges.

Verification procedures become of special importance in the formative processes based on the virtual community. The verification procedures are used to render the means of verification and certification of formative results by:

1. Providing the means for an automatic tracing of formative activities by reporting data that could be used by the professor and user.
2. Didactic monitoring and feedback done by the tutor.
3. Verification of the formative type also for personal valuation.
4. Final exam or other termination check for the course, in which the work done will be taken into consideration.

An example of permanent formation is provided through the Italian **Varco Project**. The Varco Project has as the main objective for the valorisation of human capital based on continuous learning throughout one's life. The project is oriented towards groups who based on, sex, level of instruction and age are usually excluded from the retraining processes and have a strong necessity to be integrated in companies. The groups are usually represented by the categories of workers who are at high risk of discrimination, marginalisation, handicapped women, men over 45. The Varco project has a model for the valorisation of competences for these targets of workers by means of the distance e-learning, with the presence of a Varco consultant that facilitates and motivates a transformation process assuring the technical assistance to the group in a classroom, the supervision at a distance for workers built on line through the help of ICT.

1.3. The tangle of paradigms

1.3.1. Various perspectives

The concept of Lifelong Learning can be perceived from several points of view.

Thus, Lifelong Learning can be understood as an *objective process, which takes place*, in a variety of manners and with different intensity, *in the lives of all people*.

It can also be perceived as a *conscious activity* of the individuals, *aimed at gaining maximum out of this process*, under the concrete existing conditions.

Finally, it can constitute a *policy perspective*, aimed at *creation of the possibly most conducive conditions for the conscious realisation of Lifelong Learning activity* of the individuals, notwithstanding the broader (social, economic,...) purposes of this activity.

Yet, it could be seen from the previous considerations, related, e.g., to the Lisbon Agenda, adaptability, employability, etc., that with respect to the latter perspective there is also a very important dichotomy in the perception of the Lifelong Learning, namely the one between:

- The *civil right of individuals to Lifelong Learning*, meaning creation of adequate conditions for the realisation of individual projects concerning personal education paths, notwithstanding the content and nature of the path, including the formality or informality of education.
- The *mechanism of enhancing the economic effectiveness and efficiency of the individuals, companies, sectors, regions, nations and the Continent, through effective and efficient Lifelong Learning* oriented at the subjects and specialisations that improve competitiveness of these all entities.

While it is obvious that there is a wide correlation between the two, in conditions of limited resources a choice problem appears to face the respective authorities and policy makers at all involved levels.

1.3.2. Knowledge and information as a resource

Indeed, “Knowledge is not among the resources that are developed together with the traditional factors of production, but it is the resource of the new society” (Drucker, 1993⁷). In fact, the societies of today that are referred to as “post industrial” or “post modern” are characterized by the “knowledge” that comes from the circulation of information, and no longer, by the mobilization of capital and supplies. Globalization fixes as its goal the activation of international cooperation in production, in research and the development of marketing, develops itself not only around the movements of investments and capital but relies on the expansion of communication, information and ideas. The “Knowledge Works”, who have a prominent role are involved in knowledge, in which they organize and administer. Today, companies invest in human capital because formation has become important and their objective is the development and organization of human resources.

In this way we have shifted from a strict institutionalized formation to a formation that involves the exchange and circulation of information and knowledge. The continuous formation is in constant movement, for the improvement of knowledge that each person possesses, and through the entire period of one’s working life one must renew their knowledge, ability and, of course, resources.

In 1994 the European Commission for the Politics of Occupation using the White Book have passed on the principle of the importance and value of human resources. The idea is to promote Lifelong Learning among people. We must, as well, promote creativity, self reliance, a critical sense, a capacity of problem solving and, of course, the ability to choose.

One of the objectives related to formative activities is to promote the diffusion of new multi media technologies that offer new opportunities.

Investment in formation improves value, but tends to use up or diminish the productive capital, therefore the formation-oriented companies and organisations are sometimes penalized in terms of dedicated time, number of people and economic budget assigned.

⁷ Drucker P.F. (1993) *La Società post-capitalista*. Milano: Sperling & Kupler.

Thus, Lifelong Learning enhances human capital, and also, more broadly, it is hoped, social capital. This, however, takes place at a cost and the way to assess the “value added” is through the effectiveness and efficiency of the respective entities, from the individuals (jobs and salaries gained) upwards in the hierarchy of levels. In such a perspective Lifelong Learning can also become a pressure, a must, forced upon a person from the outside. *Is this, though, all that is about Lifelong Learning?*

1.3.3. A synergy

The term of Lifelong Learning introduces the concept of an individuality for what, how and why we must learn. The concept of learning assumes a new significance, related to the setting. It results from the permanent need of information and the need to know, the economic necessity for constant improvement in professionalism in every level of interest for companies and their workers, with permanent formation we try to avoid the exclusion from the work force. Permanent formation constitutes a system that is characterized by its promoters and administrators for the needs, qualities and public actions.

On the other hand there is the image of a (possibly) free access of individuals to the learning opportunities, a conducive community culture, in which education is not only esteemed, but also treated as natural, not only for career-related reasons, but simply as a part of human condition (along with beauty, wealth, wit, strength, ...).

This image is insofar important as, *first*, Lifelong Learning might be regarded both as an *opportunity* (available or not) and as a pressure, a necessity to learn incessantly (this pressure also present or absent from one's life). It is obvious that the freewill character and the possibility of making one's own choice are not only at the base of the civil right perception of Lifelong Learning, but they also enhance the effectiveness and efficiency of the Lifelong Learning processes at the individual and social levels. Second, contrary to quite common conviction, the *need* (as distinct from *wish*) to learn during whole life results nowadays not so much from the increased volume of information and knowledge that one has, “on the average”, to learn in order to attain personal and social goals, as from the *rate of change*

in this pool of information and knowledge. Indeed, a European peasant several centuries ago had to master several hundred technological processes of quite important complexity and associated uncertainty (weather, qualities of the materials, etc.), something that is very rarely – if ever – learned nowadays⁸. His current counterpart does not have to learn that much, a large part of these processes having moved out of the farm, but the respective knowledge is no longer given once and for all the time. It is no longer what Jack, Hans, Jean, Jaś, Honza, Gianni, ... have learnt as a boy that will serve them all their respective lives (and even more so if they have not, of course).

It should be considered, therefore, that the broader social and economic goals might best be served by a possibly effective promotion of Lifelong Learning as a personal orientation, irrespective of the direction of education undertaken, while adequate information on the available learning opportunities ought to provide for the steering of the educational paths in accordance with the requirements of the market.

It cannot be hoped that centrally ordered curriculums and structures will serve people and the economy better than a *possibly free and possibly well-informed choice by individuals*, who are persuaded of the intrinsic value in education, knowing, having skills and competence. Further, education is always an effort, it takes always place at a cost. The issue is at making this cost possibly low, at least for those, who really wish to engage in learning. It is a common experience that those, who have learnt, learn more, while those, who have not learnt, do not learn any more. It is this vicious circle that has to be broken in order for the improvement to really happen.

⁸ see Owsinski, J.W. (2007) Na drodze do społeczeństwa wiedzy? (On the way towards the knowledge society? In Polish). *Biuletyn Informacyjny RENOWATOR. WSZP, Toruń*.

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2. The national perspectives

2.1. The national accounts

This section contains shorter and somewhat longer “national” reports, mainly dealing with the formal state of implementation of the Lifelong Learning idea in particular countries, represented in the Working Group. The variety of the situations here described seems to be adequately representative for the European state of things. The reports also in some cases focus on quite specific formal and institutional aspects or processes related to the Lifelong Learning. Some comments are also forwarded concerning the actual situation, as complementing the formal side of both understanding and implementation of the Lifelong Learning concept.

The accounts are ordered in the alphabetic order, except for the ample French report. This report appears as the closing one, both because it is an ample presentation of a specific French mechanism of continuous vocational training, and because it then links in a natural manner with the next chapter, starting with the structure for consideration, composed of a set of notions intervening, also largely due to the contribution of the French representatives.

2.1.1. Austria

Implementation of the Coherent and Comprehensive Lifelong Learning Strategy in Austria (as of 2005)

Main Policies/Measures

State of Development of Austria vis-à-vis the Design and Implementation of a Coherent and Comprehensive Lifelong Learning Strategy

The high priority of Lifelong Learning in Austria is expressed in a decision of the Austrian National Council “for the strengthening of Lifelong Learning”. It corresponds to the increase of the budget for general adult learning by 28% for 2005. In the Governmental Statement of the Federal Government it was decided to establish a national expert group for the co-ordination of Lifelong Learning concepts and measures.

The important ideas for and foundations of the Austrian strategic development of Lifelong Learning have been:

- The implementation of the consultation process for the Memorandum on Lifelong Learning, taking into account all relevant actors and groups, as well as the conclusions and consequences of this learning process.
 - The concrete definition of objectives conform to the European benchmark passed in 2003: “by 2010, the average level of participation in Lifelong Learning should be at least 12,5% of the adult working age population (group of 25 to 64-year-olds)”. It should be noted that Austria has already reached this benchmark.
 - The 2003 preliminary work (“Country Background Report”) with generally accepted conclusions on a strategy for adult learning and discussions as part of the OECD Country Review on Adult Learning.
 - The discussion and conclusions from the OECD Country on Adult Learning since July 2004, from an event organised by the Federal Ministry of Education, Science and Culture (BMBWK) on the same topic in June 2005, and the Synthesis Report of the OECD on all participating countries (Promoting Adult Learning).
 - The reception and discussion of European surveys (such as CVTS-2, Eurobarometer 2003) and indicators of Lifelong Learning in education policy and academic discussions.
 - The commissioning of *Statistik Austria* with the implementation of an ad-hoc module on Lifelong Learning within the framework of the microcensus in June 2003 by the BMBWK in addition to the required EU-wide Labour Force Survey and the publication of this module by EUROSTAT for all participating countries.
 - Production of an “Education & Training Strategy 2010” (2004), which includes considerations on school, pre-school and adult learning.
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The General Austrian Approach to the Lifelong Learning Strategy

The concept of the Austrian Lifelong Learning strategy is based on the main principles of the Austrian education policy.

Such already long-term effective principles with regard to the Lifelong Learning strategy are:

- The permeability and inter-accessibility of all education and training courses.
 - Equal opportunities and securing of standards by nationally binding curricula and professional images.
 - Legal possibilities and funds in order to allow for the possibility to attain all school graduations and apprenticeship qualifications in second-chance education.
 - Promotion of a wide range of training after completion of compulsory education in order to do justice to all talents and interests of young people.
 - Constant adaptation of vocational education and training in the dual and full-time school system with the social partners, based on relevant research and development.
 - In case problems arise on the apprenticeship market, ensuring regional flexible reactions so that all young persons can be guaranteed training in schools or colleges, in the apprenticeship training system or in the "safety net" ("Auffangnetz") of the Public Employment Service Austria (AMS).
 - Promotion of adult learning by the Federal Government and the governments of the Austrian "Länder" (general and vocational adult learning) and the social partners (with a focus on vocational adult learning); in addition, individual promotion models, mainly in the form of reimbursement of course costs, are being offered in the "Länder".
 - Formation of partnerships on a federal, regional and local level (e.g. learning clusters or the JUNIOR24 project).
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These basic principles are co-ordinated between the responsible ministries in the Council of Ministers. The development of a “comprehensive and coherent” strategy of Lifelong Learning will be tackled in a “Task force Lifelong Learning”. Another expert meeting on this topic was organised by the University of Continuing Education in Krems.

Particularly in the field of basic school education, a commission (consisting of university educational researchers) was commissioned by BMBWK to make proposals for measures to improve quality in the field of basic education.

Identification of Priority Reforms for the Implementation of Lifelong Learning across the systems

1. Systematic Involvement of All Key Actors by Developing Partnerships on a National, Regional & Local Level:

The key actors (involved federal ministries, the Public Employment Service Austria - AMS, social partners, adult learning institutions, provinces) were actively involved in the previous process for the development of a strategy for Lifelong Learning on a national level in the Lifelong Learning consultation process, in working groups and in public events as well as in the preparation of the OECD country analysis on adult learning. This was demonstrated by widely approved conclusions at the end of the country background report, which were generally accepted as the basis of further discussion on priorities and measures.

On a regional level, so far there have mainly been activities on the coordination of the territorial employment pacts. In the federal provinces the Public Employment Service Austria has set up bodies in which the social partners & the provinces formulate priorities for the active labour market policy and vocational qualifications.

The introduction of a “one desk shop” for SOCRATES and LEONARDO projects in the national agencies (2004), which allocates the funds of the Federal Ministry for Education, Science and Culture (BMBWK), the Federal Ministry of Economics and Labour (BMWA) and the Federal Ministry of Agriculture, Forestry, the Environment and

Water Management (BMLFUW), facilitates and improves the participation in European education and training programmes.

The launching of information campaigns within the framework of the *Adult Learners' Week* of UNESCO (1999- 2003) and of a media initiative on adult learning (2005) in cooperation with the *Austrian Conference of Adult Education Institutions (KEBÖ)* was intended to involve also other key actors and, in particular, to raise the interest in CVET (Computer Vocational Education Training) among people who had hardly been addressed before and to motivate them to take part.

2. Developing the Foundations for Further Learning at the Earliest Possible Stage in the Education System:

An increasing number of courses are being offered for the later completion of compulsory school education ("secondary school graduation", the *matura*). Over the past few years, the Education Ministry has substantially increased funding for related course offers in adult education institutions with ESF support (Objective 3).

Since 1996, every year in autumn a "screening process" has been carried out in the form of course places or other training possibilities in order to keep the number of young people without access to training and training qualifications as low as possible. In the recent past, above all pre-school financing, particularly for children whose first language is not German, has been discussed. Here work is already being carried out on the implementation of a concept.

3. Definition of the Objectives and Curricula from Pre-School to Upper-Secondary Education in Terms of the Attainment of Key Qualifications:

The matter of the definition of objectives of courses and the curricula in terms of the attainment of key qualifications received various responses in all forms of school education as well as the dual apprenticeships. Social skills, basic computer skills and basic school qualifications were included in all curricula. The relatively new concept of "education standards" aims to ensure the teaching of basic school qualifications. This is currently in its trial phase in primary and lower secondary schools.

In December 2003, the *Austrian Language Committee (Österreichisches Sprachenkomitee - ÖSKO)* was officially set up by the Federal Ministry for Education, Science and Culture (BMBWK). The Committee's first and foremost task is to make proposals with regard to lifelong language learning and to dedicate itself to the promotion of language learning. Since the 2003/04 school year, the teaching of a modern foreign language has already been compulsory in the 1st grade of Austrian elementary schools.

4. Recognition and Validation of Non-Formal and Informal Learning:

In the field of vocational education and training, the recognition and validation of non-formal and informal learning has a long-standing tradition and quantitative significance. More recent approaches include the admission to the universities of applied sciences without a school-leaving examination. In the *Universities of Applied Sciences Development and Financing Plan III for the Period 2005/06-2009/10*, which was submitted in 2004, the increased recognition of non-formal subject qualifications of employees is quoted as an objective.

5. Development of Diverse Learning Pathways and Open Learning Environments:

The principle of the diversity of learning and training pathways is a basic principle of the Austrian educational system. Vocational Education Training (VET) schools and colleges with various work placements and dual training courses co-exist as various options. The diversity is being further increased via the definition of focuses within vocational training courses.

6. Investment in Teachers' and Trainers' Training to enable them to play their New Role in the Knowledge-based Society:

The subject and general teacher further training is, above all, organised by the teacher training colleges. Many teachers, however, organise their own training, both at external education and training providers as well as in the form of specialist reading or computer or webbased measures. In the sector comparison, all available data

(e.g. microcensus on Lifelong Learning of June 2003) show the highest participation in Lifelong Learning for employees in the teaching sector.

The previous teacher training colleges are upgraded in institutional and qualitative terms to teacher-training universities, whereby – based on the Bologna model – special focuses are placed on Bachelor and Master courses, the information and competence-based selection of students as well as the quality assurance of training institutions. For the future, substantial improvements are expected by the institutional upgrading of pedagogic colleges to teacher-training universities as well as by the establishment of a “Leadership Academy”. The Leadership Academy is a nation-wide project across all institutions for the qualification of leaders in the pedagogic field. Its principle consists in a high skills potential of managers which must be used and developed in networked school development projects. In October 2005 the first generation of Leadership Academies was certified, the second is currently running until October 2006, a next generation is currently in the planning stage due to the high level of interest.

In 2003 the BMBWK increased its financial support for train-the-trainers projects for trainers and training managers in not-for-profit adult education institutions with ESF and national funds. Several skills training projects for teachers are now underway.

7. Integrated Use of ICT in Education and Training Systems:

The integration of ICT in education and training has been a priority of the lesson administration since the mid-1990s and is conceived and promoted by a department and working group of the Federal Ministry for Education, Science and Culture (BMBWK). Since the end of the 1990s, ICT has not only been integrated in VET schools and colleges through new special training focuses within existing subjects, but above all across all disciplines in adjusted cross-curricular changes of the curricula. The IT initiative “eFit-Austria” has existed since 2000. This initiative’s goal is to increase access to education, improve quality of education for the individual and of the entire education system by the sustainable use of modern information and communication technologies. As part of eFit-Austria, in the field of “eEducation”,

special skills training programmes are being implemented for pupils, and in the field “eTraining” CVET (Computer VET) programmes, particularly for people who need to be integrated in the labour market.

In higher education, as part of the initiative “New Media in Teaching at Universities and Universities of Applied Sciences”, between 2000 and 2003, 25 project developments with a budget of approximately euro 8 million were commissioned. These projects reached 44,000 students, 2,000 graduates, 4,500 teachers and 36,000 people who were interested in CVET as defined by Lifelong Learning. This basis is expanded with the strategy call for tender to the tune of euro 3 million between 2005 and 2007 in which universities and the universities of applied sciences can submit their application with their e-Learning/e-Teaching models and implementation projects.

8. Focus on Disadvantaged Groups:

For a long time, the focus on disadvantaged groups in Austria has been on the initial training of young people. Supplying all young people interested in training with a training place is an education and labour market policy priority since around 1996.

The statutory possibility of “inclusive vocational training” was anchored in the Vocational Training Act 2003 (“*Berufsausbildungsgesetz*”, BAG). This concept, based on principles of social pedagogy and VET-training, is aimed at young people with a disadvantage and integration problems on the apprenticeship training market and combines financial subsidies by the Public Employment Service Austria (AMS), needs-oriented extendable apprenticeship terms and graduated qualification possibilities. The allocation of young people in this program in no way implies a reduction of later possibilities, as it is designed in an open and flexible manner. The AMS further expanded the labour market promotion scheme for unemployed young people (with the focus on 19 to 24-year-olds) JOBS FORYOU(TH)'04 in 2004 and thus created qualification & employment opportunities for at least 10,400 people.

Programme priorities include the repeated increase of JOBS FORYOU(TH) funds, the promotion of additional apprenticeship va-

cancies (Project '06), and the acquisition of the lower secondary school qualification by adults.

In the field of adult education, the Education Ministry with the support of the European Social Fund has been supporting measures for basic education/literacy enhancement within the framework of second-chance education and other projects for disadvantaged people (women, immigrants, disabled people, etc.; also in connection with the National Action Plan on Social Inclusion) as well as some major Equal Development Partnerships (DPs) in the same areas.

9. Prolonging the Habit of Learning Throughout Life and Enhancing Learning Access and Opportunities for Older Citizens and Workers:

For a long time, the focus on disadvantaged groups in Austria has been on the initial training of young people. Supplying all young people interested in training with a training place is an education and labour market policy priority since around 1996.

Older groups of people with disadvantaged access to Lifelong Learning were previously not focused on as much as young people without a training place. Part of the OECD Country Review focused on the problem of “unreached” adults and on adults with deficits in their basic education, reference was also made to the significance of adult education centres which are easily accessible for all. In May 2004, the social partners organised an enquiry on the topic of “Age Appropriate World of Work” in which the participation in CVET played an important role.

10. Developing Flexibility within and between all Sectors of Education and Training:

One focus of the past years has been the promotion of permeability and the recognition of already completed services in the transition between education and training levels. For a long time, there have been “add-on apprenticeships” in vocational training for graduates of a VET school (BMS) to acquire the qualification of a VET college (BHS). For secondary education graduates, colleges are set up at VET colleges (BHS), where pupils can attend full-time and part-time

courses. For graduates of apprenticeships, there have long since been VET schools and colleges for employees in employment, which are mainly attended in the evenings (generally part-time while in employment).

Since the amendment to the University of Applied Sciences Study Law 2003, not only the universities but also the universities of applied sciences have been entitled to offer CVET courses. As the universities of applied sciences, due to the large number and needs-oriented foundation of locations, offer regionally widespread business-oriented and vocationally oriented training, the development of an additional attractive CVET offer was initiated.

The goal of the University of Applied Sciences Development and Financing Plan III for 2005/06-2009/10 is to increase the number of students registering with a university entrance and vocational qualification, increase the recognition of non-formally acquired subject qualifications of employees in employment as well as increase the significance of distance learning in courses of the universities of applied sciences.

11. Improvements in Curricula, Learning Tools and Methods:

The adjustment of curricula, learning tools and methods in schools and learning institutes is a continuous challenge. Thus, since the mid-1990s, more than 150 apprenticeships have either been modernised or completely recreated. In the VET schools and colleges (BMHS), via internal differentiation based on special focuses, not only the diversity of the offer was increased, but also and rather considerably the percentage of teaching of information and communication technologies and other basic qualifications. In general education, the entire curricula of secondary level have been updated continuously since 2000.

12. Promotion of Lifelong Learning through National or Regional Economic and Social Partnerships and through Civil Society:

Austrian adult learning is characterised by a range of networks right across the Austrian provinces. Thus, the major general education

adult learning institutions, such as the adult education centres, VHS, and the Catholic educational associations, as well as CVET providers, such as the Economic Promotion Institute WIFI, the Vocational Training Institute Vienna (BFI) or the *Ländliches Fortbildungsinstitut* (LFI) each have a large number of regional locations and a national network. The Austrian Conference of Adult Education Institutions (KEBÖ) also functions as an interface between the non-profit adult learning providers. A good example for the promotion of Lifelong Learning by partnerships is the University of Continuing Education in Krems, a co-operation between the Federal Government and the provincial government of Lower Austria.

Use and Implementation of Instruments that Have Been Developed under the European Work Programme (Objectives, Copenhagen Process) in the Context of Putting in Place the Lifelong Learning Strategy

The European benchmarks for general and vocational training have gained a central orientation function for education policy in Austria. For the more effective use of the Lifelong Learning structural indicator, the Federal Ministry for Education, Science and Culture financed a survey in 2003 (ad-hoc module on Lifelong Learning) which was carried out by "Statistik- Austria" and which offers differentiated and empirically well-founded insights into the structure and financing of the Lifelong Learning and, among other things, showed that in this sector of the Lifelong Learning structural indicator the 2010 target value for training and CVET was already attained with 12,5% in June 2003. Both with regard to this indicator and in the successful integration of young people in training in lower secondary level, the values should be maintained or improved.

The working groups of the Copenhagen process provided important suggestions, which are currently being intensively discussed by the Federal Ministry for Education, Science and Culture, with the involvement of the social partners and the education providers (e.g. EQF Equal Quality Frames, and ECVET, the common European credit system).

Next Steps and Challenges for Future Reforms

The next central step is the formation of a “Task Force Lifelong Learning” commissioned to elaborate more detailed targets – both thematically and time-wise – until 2010 and to coordinate their implementation.

The orientation towards European benchmarks and goals is an important input for the Austrian education policy and, in connection with Eurostat surveys of “*Statistik-Austria*”, has led to improved insights into the structure of participation, interests and financing of Lifelong Learning.

Based on this, the strategic key points should be developed step by step in the form of a broad consultation and discussion process.

More information can be found at, e.g.:

www.lebenslangeslernen.at (only in German)

www.erwachsenenbildung.at/services/englische_uebersicht.php

www.bmbwk.gv.at/europa/bildung/abb2010/abb2010_zwb.xml

The subsequent section, devoted to Germany, presents more of a broad comment to the existing way Lifelong Learning is understood and pursued on both national and regional (*Länder*) levels. The elements of the process are made explicit and placed in a context. We thus obtain a natural complement to the description provided for Austria.

2.1.2. Germany

Strategy for Lifelong Learning in the Federal Republic of Germany

The purpose of the German strategy paper (see Literature to this section) on Lifelong Learning is to describe how all citizens can be encouraged to participate in learning during all phases of their lives and in all spheres of life, at different learning sites and through many different types of learning (Bund-Länder Commission for Educational Planning and Research Promotion Secretariat, pp. 5-8). Lifelong Learning includes all forms of learning – whether formal, non-formal

or informal. "Learning" is understood to mean the *constructive conversion of information and experience into knowledge, insights and skills*.

Pursuant to Germany's constitutional framework, the strategy for Lifelong Learning in the Federal Republic of Germany cannot be described as a "coherent national strategy", but as a jointly agreed strategy for Lifelong Learning, which identifies the aspects and contexts on which there is a broad consensus between the different *Länder* as well as between the Federal Government and the *Länder*, irrespective of their responsibilities.

The strategy has been devised to match not only the life phases of the individual from early childhood to old age but also essential aspects of Lifelong Learning, which constitute development focuses. Within this framework, realistic and sustainable perspectives are being developed, which are based on existing educational structures, activities and experience and which define a structured framework for Lifelong Learning that is flexible and open to the necessary continuous process of further development. The development focuses of this strategy are:

- Inclusion of informal learning.
- Self-directed learning.
- Development of skills.
- Networking.
- Modularisation.
- Learning guidance.
- New learning culture/popularisation of learning.
- Fair access.

The chapters of the Strategy paper dealing with **children, adolescents, young adults, adults** and the **elderly** show the relevance of the development focuses to the different phases of life and reveal how these focuses are part of the Lifelong Learning strategy. At the same time, the combination of **life phases** and **development focuses** seeks to counteract the separation of the individual educational sectors.

During "childhood" learning greatly influences, in a positive manner, the access to education and thus the individual's chances of success in life. This is the period in which the foundations for Lifelong Learning are laid. The motivation and ability to learn are aroused and encouraged; children's abilities are enhanced and they are supported with the aim to develop an independent personality. The target groups include not only the children themselves, but also their parents, other central figures and teachers at day-care centres as well as teachers at primary school. Essential elements during this phase of life include the scope and quality of **informal learning**, the **development of skills** on the basis of new educational plans, the **networking** of kindergartens, schools, parents, child and youth service institutions, as well as **learning guidance** particularly for parents.

During "adolescence" most learning processes take place at school. Learning during this phase of life is characterized by educational programmes organized by others and by the obligation to learn. The **development of skills** is particularly important; this means that schools impart basic skills such as learning and action skills, social and personal skills, as well as the ability to work in a team in addition to subject knowledge. Attainment targets and final qualifications will be comparable, e.g. by the introduction of educational standards. It is also very important to foster the ability of adolescents to organize their own learning and to make them practise independent learning (**self-directed learning**). Furthermore, mention has to be made of learning guidance, which is to help overcome learning problems and to provide orientation to schools and career guidance services, and of the development of a new **learning culture** that gives schools more scope for their own decision-making and for developing their own profile. **Fair access** is ensured by means of a wide range of supporting measures.

During the next phase of life, which begins when "young adults" enter the world of work or start their initial vocational training and which ends when they take up regular employment, the following focuses are of major importance: the inclusion of **informal learning**, **self-directed learning**, the **development of** (social, professional,

cultural and personal) **skills** and the documentation of informally acquired skills. **Networking** takes place mainly between schools, companies, higher education institutions, associations, job centres and institutions of continuing education. By **modularizing** educational content, individuals are enabled to enhance their skills systematically, and **fair access** is improved. **Learning guidance** with respect to questions of vocational training, academic studies and continuing education or training plays an important role. In this phase, the main features of **the new learning culture** are relevance to practical work and orientation towards transferability. It is important to help young adults understand that entry into the world of work does not put an end to learning but means transferring to another stage of learning.

"Adult life" is a phase which is increasingly determined by change, and for some by breaks and interruptions – a fact which clearly demonstrates the need for Lifelong Learning. Because of their strong involvement in professional life and family life time is very scarce for adults. Therefore, the possibility to structure their own learning (**self-directed learning**) is very important for them. The skills acquired through **informal learning** in the family, on the job and through leisure activities become employable qualifications through documentation and recognition. The **modularization** of learning content makes it possible to gradually build up individual competency profiles. Personal, social and occupational skills can be further developed in courses offered for continuing general, vocational and political education.

The term "the **elderly**" is defined as including mostly adults who will soon enter retirement or are already retired. Formal learning becomes less important; learners have greater freedom to decide for themselves whether, how and for what purpose they should take part in learning activities (**self-directed learning**). Achieving or retaining independence and autonomy even at an advanced age is one major goal of Lifelong Learning during this phase of life. With regard to the **development of competencies**, it is obvious that preserving skills and abilities is more important than developing new ones. The learning activities of the elderly also have a compensatory function, in particular for the last years of occupational life, for retirement and in order to make up for deficits. At the same time, older people also acquire new skills in order to pass on their experience and knowledge or to do voluntary

work. The removal of age-specific obstacles in existing educational programmes is a prerequisite for **fair access** to Lifelong Learning also for the elderly.

It remains a task for all the responsible players in the *Länder* and in the Federal Government to apply the framework defined in the German strategy paper in accordance with their respective educational priorities. The adoption of the report in the Bund- Länder Commission for Educational Planning and Research Promotion shows that those responsible are willing to actively promote the further development of education in the Federal Republic of Germany.

Literature:

- Bund-Länder Commission for Educational Planning and Research Promotion Secretariat: Strategy for Lifelong Learning in the Federal Republic of Germany. Bonn 2004.
- Communication from the Commission: Making a European Area of Lifelong Learning a Reality. Bruxelles 2001.

2.1.3. Italy

The Lifelong Learning today in Italy, its evolution and the new strategies

This section was prepared from the standpoint of S. Giuseppe Moscati – The VARCO project.

The overview

In Europe, during the past years a model was created that gives importance to learning, an immovable condition to work and live in a knowledgeable society that favours development of diverse formative systems.

A decree from the Italian Ministry of Public Education, no 455: Education during adult life- Instruction and Formation, dated 29th of July 1997, gives the possibility for development of the Lifelong Learning sector.

The permanent territorial centres, CTP, have been established. These are the centres that examine and activate instruction and formation initiatives, the gathering and diffusion of documentation to create agreements, understandings and conventions with institutions and agencies that operate with these initiatives for adult education.

The CTP organize formation with courses that have the main goal of attaining certification, elementary and high school licences, and specialised courses that lead to obtaining of certificates corresponding to the courses followed.

Factors that have accelerated the evolution of Lifelong Learning in the recent years are characterised by: new technology for information and knowledge, new techno-organisational dynamics in the company systems, new concentration of instruction and formation as an answer to the risks of isolation that touch particular social categories, given that even today such risk-prone categories have a strong presence in Italy.

For the realisation of these objectives and in order to surmount the respective problems, there are three levels of organisation, activated on an institutional level: the national level, the regional level, and the local level.

The Ministry for University Education and Research, The Ministry for Labour and Welfare communicate between themselves with a strategic goal to recognise the possible resources, the possibility of activation of such resources for these formative standards, as well as monitoring and valuation of respective initiatives.

The regional commission which is composed of Local Institutions from the Regional Educational Department and the social partners has the function of programming the integrated formative offer in order to realise the formative activities on the territory and activate the available resources.

The provinces, municipalities and the special purpose administratively defined communities are responsible for the fulfilment of various competences with the local commissions, such as the running of the operative unit for the programming for formative courses and

adult education on their proper territory and organizing the activities on a regional level.

Strong and critical points of Lifelong Learning in Italy

- The single formative activities are appreciated, such as courses and seminars, but certain tiredness is noticed towards the classroom and towards the repetitive rhythm of courses and seminars. This is especially applicable to the semi-obligatory kinds of courses (like those organised by the employers for the employees).
- Demand for Lifelong Learning is continuous; this makes us understand the strong and growing demand for formation, even though it has difficulty taking off.
- In Italy, the Faculty of Educational Science has been created as a full-fledged university chapter.
- In companies there is an increase in disregard for traditional courses and seminars (see the first point above).
- In organizations, formation is penalized with regards to the amount of time dedicated, number of people, and economic budget, which severely limits the Lifelong Learning opportunities.
- Formative tutors have difficulty in identifying their role and proper functions.

The search for the new equilibrium

In Italy, formative courses done at a distance (e-learning), in their full rendition, are starting to become what is called the “third generation” education. An ever growing number of universities and institutes for formative education at the national and international levels are appreciated highly in the category that offers courses on the internet, concentrated on adult users. Yet, the formative courses on the internet offer contents that gives rise to many difficulties. Thus, there is a need to create mixed approaches, associating direct and distance learning, and, of course, there is the need to have a tutor present

on the internet that has didactic formative capacities.

The models that have been experimented until now will evolve thanks to the availability of new technology, such as video communication or virtual reality, which at the moment are not completely available due to elevated costs. According to Trentin (1988)⁹, we should orient ourselves to the solution of problems that can be an obstacle for the diffusion of various models, so that formative courses done at a distance can enter in every working context to be able to give new possibilities and new opportunities to each individual.

2.1.4. Poland

Lifelong education – some remarks from the Polish perspective

The present shorter section is accompanied by the translation of the respective Strategy (containing also a number of footnotes from the translator), adopted by the Polish government in 2003, concerning permanent education. This document makes a link to the European level concepts and policies and defines the activity framework meant to implement permanent education as a persistent element of the entire educational system. It is appended in its entirety as an Annex to the present chapter of the document.

1. Lifelong Learning (Lifelong Learning) is practically equated in Poland with permanent or continuous education, as the broadly conceived learning processes concerning people at various ages and in various life situations (e.g. educational levels).
2. Lifelong Learning as a concept has in Poland a relatively long history, going back to the movements and institutions of the 19th century, of grass-roots (“positivist”) character. These movements and institutions, of both leftist and rightist political vein, were primarily meant for the liquidation of illiteracy, promotion of education in rural areas, and emancipation for women.
3. Such movements and institutions continued to exist in the 20th century, and also after the World War II. Most of them

⁹ Trentin G. (1988) *Insegnare e apprendere in rete*. Bologna, Zanichelli.

were liquidated by the communist authorities (like, e.g. the Motherly Schooling) for their association with the rightist or anti-communist attitudes. Some, however, continued to function (like The Association of Popular Universities and the People's University), though in a largely narrowed down domain, allowed for.

4. Nowadays, Lifelong Learning has in Poland a double character: on the one hand it is being organised and promoted by the authorities, starting with the central administration, and on the other hand – it is a process that goes on in the society, with a rapidly increasing intensity.
 5. Thus, concerning the official governmental and organisational (“public”) side of the processes:
 - 5.1. There exists, for a long time already, a formal public infrastructure for dealing with “permanent education”, functioning within the formal public education system. This infrastructure, however, is not generally fit to the labour market, and is often a sinecure for the less gifted or willing teachers and managers. It is also assigned a relatively low significance.
 - 5.2. On the other hand, the governmental documents, like the Strategy attached in the Annex to the chapter, make explicit reference to the European policies and concepts in the domain of Lifelong Learning/permanent education. This is related to such aspects as (I) EU funds, which can be taken advantage of to assist in implementation of Lifelong Learning policies in particular countries, (II) the justification, mainly in terms of increased chances on the labour market (with a mention of “personal development”), and, with somewhat less emphasis, enhanced competitiveness, (III) the understanding of the process and the institutional side of Lifelong Learning as a part of the “holistic” educational system.
 - 5.3. The Strategy is primarily devoted to the organisational and technical sides of Lifelong Learning, although significant attention is also paid to the institutional / networking aspect. The latter is particularly associated with the inter-
-

ministerial collaboration, the involvement of the local and regional self-government bodies, and the social partners, notably the employers.

5.4. It must be emphasised that the Polish educational system relies to a large extent on the local and regional self-governmental authorities, and their contribution is crucial for the maintenance and running of the formal educational infrastructure.

5.5. The involvement of employers is actually little known on a broader basis, this being also acknowledged, indirectly, by the Strategy, in points where improvement of statistics on permanent education is suggested. The current estimates place this involvement at a very low level, but this has not necessarily to be the case, given low motivation of employers to provide appropriate data, even if they undertake and/or contract training activities.

6. On the other hand, Poland has gone through an unprecedented development of educational initiatives, not encountered in any other post-communist transition country, nor in the western countries.

6.1. A vast non-public educational & upbringing sector appeared, ranging from the pre-schooling to university level. It plays an especially important role in: (I) secondary education, (II) tertiary education, and (III) professional training (in some domains). This non-public sector can be classified into two sub-sectors: (A) the commercial one, where schools and training establishments are explicitly meant to generate revenue for private owner(s); (B) the social or community based, where schools are established to serve a certain purpose, related to education (denominational schools, schools run by various associations involving also parents, etc.).

6.2. Virtually all of non-public education sector is paid. Despite this, the non-public sector developed rapidly and even nowadays, with disproving demographic situation (see the Strategy), it survives and preserves its position. More-

over, the number of university students in Poland vastly expanded after 1989, as an increasing part of tertiary education became paid (this includes also the paid extra-mural studies at the public universities). The number of students at the tertiary level increased fourfold to five-fold between 1990 and 2004, the proportion of students paying (in total or in a major part) tuition fees reaching roughly 30%.

6.3. On the top of this, the sociological studies and the statistics show that the persons learning at the paid educational establishments come from the statistically significantly poorer layers of the society than those enrolled at the public non-paid universities.

6.4. At the same time, there has been a rapid development of the various, mainly commercial, training centres, catering to employers, but also to the young facing unemployment. The relatively dense infrastructure of such centres, which encounter also competition from the formal educational sector (courses offered by the universities, high schools etc.), exists in particular in larger agglomerations, and is capable of providing a vast array of training services. Again, the fact that these centres survive on the market is the proof that demand, expressed also in monetary terms, is sufficient.

6.5. There has been a definite development of distant learning activities, especially, in recent years, of e-learning. There are several centres in Poland, first of all associated with some universities, which are very active in this domain, and offer a broad range of courses at various levels.

7. The above remarks indicate that the crucial aspect of motivation and awareness is not, at a general level, the main problem in Poland, which means that also the respective infrastructure is largely in place, even if its more detailed properties should still be a subject of improvement.

8. The primary issue seems to lie in the social (age, gender,

handicapped), branch (declining industries, former state farms etc.), and geographical distribution of motivation and awareness, coupled with access differentiation.

9. Given that motivation and awareness are largely a function of the perspectives (on the top of information and knowledge to date), the aspect of competitiveness ought to be given more attention. There is, namely, a very effective feedback between the individual development and collective capacity. A good example is provided by the case of the Polish “aircraft valley”, where development is now stifled by the shortage of adequately skilled manpower, while the areas around suffer from officially high unemployment.
10. Lifelong Learning seems to be a well-rooted concept in a vast portion of Polish society, and is both well understood and promoted by the authorities, even of the latter do not dispose of means proportionate to the objectives set in this area. The primary issue lies in the skilful broadening of these areas where Lifelong Learning works, so as to maximise efficiency, that is - without incurring too high social costs while achieving possibly high output in educational and personal satisfaction terms.

2.1.5. Slovakia

The concept of Lifelong Learning in the Slovak Republic

Introduction

Development of technology, IT society, economic globalisation, and changes on the labour market increase the strategic importance of learning and education. The future of every country is a learning society, where initial education is not sufficient for the Lifelong working and socialisation process. This is the origin for the need of Lifelong Learning. Success in this area is conditioned by creation of good environment for the possibility and actual attendance of each citizen in the Lifelong Learning process.

Current position

Lifelong Learning includes learning and education in the school sub-system (kindergarten, primary – elementary – school, secondary and university level schools), and non-school educational sub-system (enterprises, branches, citizens, interest groups and so on). The first system is equivalent to formal education, while the second – to the non-formal one. According to the European Commission the *emphasis is on the activity of the learning subject*. The two sub-systems mentioned ought also to be complemented with the non-institutional learning, based on the everyday activities, carried out in work, within family and in free time.

Financing of education

Sources of funds and the rules of financing in formal learning are defined by the Slovak law. For the elementary and secondary schools there exist financial norms per pupil, which define the amount of money the educational institutions obtain. The norms are equal for the public and non-public schools.

Sources of funds and rules of financing of the university education are regulated by a separate law. Learning at public universities is free of charge, while tuition fees at non-public university-level schools are decided by the schools themselves.

Financing of other forms of learning is secured by self-financing, the employers, state budget, local authority budget and other sources.

It can be stated that financing of the educational system as a whole is insufficient.

Approval of qualification

In the formal learning system there exist the well-defined *degrees of education*. These correspond to appropriate certificates, which are issued by the educational establishments and are by definition accepted by the employers.

In the non-formal system participants can obtain some certificates, as well, after having the respective school or course, according to case. The contents of courses given are altogether not standardised and are not required to be held valid in the same way as the degree certificates from the formal system. In general, thus, there is no obligation on the part of the employers to formally accept such certificates.

This weakness, regarding the non-formal learning system should be removed, in order to secure appropriate certification throughout the entire educational system, also including the non-formal education. This should be done through introduction of modular structures and an appropriate crediting system.

Information and advisory system

In the formal system of education there exists a database of the elementary and secondary school establishments. This database includes also information on directions of specialisation and the possibilities of continuing education at the university level. Within the school sub-system there exists a network of advisors, who can provide guidance concerning further education and career given the information on the learner.

Such a database and the associated advising infrastructure is missing in the non-formal system. More generally, however, a system of long-run information on educational paths and career capacities for the citizens in general. There are some generally available advising services at the labour offices, but they are mainly oriented at the unemployed.

Strategy for Lifelong Learning

Strategic aims for the development of Lifelong Learning concentrate on:

- Creation of appropriate conditions for the access of all
-

citizens to the possibility of acquiring and refreshing skills, necessary for the integration into the society and formation of the knowledge-based society; this regards primarily the IT, language, social and business-related skills.

- Increasing the volume of investment into the educational system in order to expand the value of the most important European resource, the EU citizens; the respective policy mix should include direct investments, appropriate taxation schemes, accounting standards etc.; progress in this field can be achieved through conclusion of framework agreements between social partners, focusing on definite areas of education, and also on cofinancing of the employee education with contribution from employers.
 - Introduction of and support for the innovation in the education process in the domains of content, form and methods of teaching, as well as in the educational technology, with the use of IT; this should allow for the change of the status of teachers; teachers should to a greater extent become advisors to the learners, so as to be able to help the self-learning and the searching persons, and to enhance their motivation.
 - Change of mechanisms and rules for the approval of qualifications, especially when reached in the non-formal and informal educational systems.
 - Ensure access to information and advice concerning the educational possibilities for everyone and for every stage of life; career advising should be permanently available at a local level for all potential clients; thereby, exact and relevant information on educational possibilities should be made available, as well as highly specialised advising facilitating the process of decision making and the motivation to improving one's personal skills.
 - To bring the educational facilities closer to people with the help of IT.
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Activities

New skills:

- Open system for Lifelong Learning in order to have stronger alternatives within the Lifelong Learning.
- Increase of interest in the Lifelong Learning within the broader public.
- To develop a mechanism for supporting projects oriented at modular educational programs meant to acquire new skills and to improve the chances on the labour market.

Investing into education:

- Increase the share and the volume of the budget for education from the side of the state budget, employers, employees, and all the social partners.
- Assign a share of budget for Lifelong Learning from the social fund; by virtue of law, social fund is created on the basis of contributions from employers, associated with the wage fund.
- Support the partnerships between the educational establishments, schools, clubs, non-governmental educational organizations, enterprises, research centres, libraries, etc.

Innovations in educational processes:

- Supporting open modular credit system of education; ensure permanent innovation of teaching content.
- Complete the system of educational and professional standards so as to make them match each other.
- Support research in the field of Lifelong Learning.

Approval of qualification:

- Establish the legal basis for the skill approval system oriented
-

at modular education process, irrespective of the way learning is taking place (formal or non-formal).

- Establish the legal basis for the skill approval system for other kinds of educational processes (first of all the informal ones).

Information and advising:

- Expand and refresh the database on the educational possibilities, qualifications and career paths.
- Make widely available the information on labour market situation, career paths, educational possibilities, including continued learning, as well as application opportunities.
- Ensure better utilisation of schools, information centres, local libraries etc. for the realisation of continuing learning.

Source used: *Koncepcia celoživotného vzdelávania* (Concept of Lifelong Learning; in Slovak). Ministry of Education of the Slovak Republic, 2005.

The French report, which follows, deploys in quite some detail the provisions of a legal nature that pertain to the continuous vocational training and skill acquisition. It is complemented by an information on the special mechanism (French: “dispositif”) meant to assure that persons wishing and trying to verify and ascertain the skills their acquired outside of the formal and even non-formal system of education, obtain an official confirmation of having acquired a given skill.

2.1.6. France

The vocational training throughout the professional life in France

1. The vocational training in France

In France, individuals have Lifelong access to education and training, at school or university in the case of pupils and students, and in the form of continuing vocational training for anyone already holding a post.

Instituted in the early 1970s, continuing vocational training involves the State, as well as the businesses, local authorities, public establishments, the State and the private educational establishments, and professional, trade-union and family organizations. Continuing vocational education (in-house training) has an original structure, leaving an important place for collective negotiation, and providing procedures for differential access to training depending on personal status. The provisions relating to continuing vocational training are the result of the initiatives taken by the social partners in collective agreements, and by the State through legislation and decrees.

2. The Interprofessional National Agreement

The Interprofessional National Agreement of December 2003, relating to the access of wage-earners to the training throughout the professional life was signed by the two sides of industry and allowed the drafting of the Law of May 4th, 2004.

The Act of 4 May 2004 on lifelong vocational training introduced an individual right to training for everyone in employment, transferable from one company to another under certain conditions (redundancy, business closure, or restructuring). The right will be exercised at the initiative of the employee, in consultation with the employer.

3. The objectives of the Agreement

In an economy increasingly open to the world, companies are confronted permanently with the need of a controlled adaptation to their environment. The accelerated renewal of the techniques of production and distribution of goods and services requests an ever increasing initiative and competence of each employee. The aspirations of the employees, coupled with a better control of their professional evolution, require the renewal of the objectives and the means of continuous vocational training.

Moreover, the demographic trends in France will be translated, in the next twenty years, into a deceleration of the generations' succession, and thus into a total deficit of qualifications and competences.

For these reasons, it is essential that the two sides of industry, through a deepened social dialogue, create conditions for a new mobilisation in favour of the training throughout the professional life in order to allow the companies and the employees to face the challenges to come.

After more than 30 years of implementation of the modified agreement of 9 July 1970, and the texts, which enriched it, an ever growing number of employees profit each year from actions of training, so much so that the financial investment of the companies in the training is generally larger than the legal minimum. Yet, it should be noted that the access of the wage-earners to the continuous vocational training too often depends on their initial training level, the size of the company, the professional sector, in which they carry out their activity, their sex, the social and economic category corresponding to their employment or the nature of their contract of employment.

In order to reduce the inequalities of access and to support the needs of training of the greatest possible number, the young people, the seniors, the women and the employees of SME constitute the priority public for which objectives of access to the training will be defined during the negotiations of branch.

Concerning the initial training area, the apprenticeship ensures the training of young people according to a program pre-established by national procedures. It differs from the «contract of professionalisation» (see below) which, apart from the framework of the first training, is for the young people a formula of training used when there is no possibility of having recourse to the training or the school ways of training. It is a form of alternate education based on a contract of employment and two places of training: the company and the centre of apprentice training (CFA).

The development of the access to the training is a major stake for the French and European societies and in order to increase in a decisive and effective way the access of all to the training throughout the professional life, the objectives of the agreement are:

- To allow each employee to be an actor of his professional evolution thanks to the “professional talk” or the actions of
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assessment of competences or validation of the knowledge and competences, acquired through experience, in which the person takes part. The "training passport" and work of the prospective trade research institute and the qualifications of its professional branch, must make it possible to each employee to be able to work out and implement a *professional project* which takes into account not only requirements in qualification for the current employment or, more generally, for the economic world, but also of own ambition to develop knowledge, competences and professional capacities.

- To support the acquisition of a qualification throughout professional life, by the young people, the applicants for a job and some wage-earners, allowing them to follow training activities, in particular within the framework of a «contract of professionalisation» or one «period of professionalisation» (= to become more and more professional in the occupied job, to acquire the competences and qualities to suit the job).
 - To develop the access of wage-earners to actions of vocational training led throughout their professional life, within the framework:
 - Of training scheme decided and implemented within their company.
 - Of the right to the individual leave of training implemented at their initiative.
 - Of the individual right to the training set up at their own initiative in connection with their company.
 - To increase the volume of the training activities organized for the benefit of wage-earners by creating the conditions suitable to allow the course of these actions during or apart from the working time, these conditions relating to the kind and the duration of the actions and on the incentives and engagements to which they give place.
 - To reduce, by adapted initiatives and measures, the noted differences in access to the training for the employees of
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small and medium-sized companies and of handicraft companies.

- To support the equality of access to vocational training between men and women.
- To give to the representative authorities of employees and managers of the company, an essential role to ensure the development of vocational training, in particular by the information of wage-earners on the systems of training (example: accompaniment in the development and the implementation of their professional project).
- To ensure a coordinated development of the vocational training in the branches and the territories, while making evolve contents of the agreements of branch on the objectives and the means of the vocational training, by specifying the role of the equal authorities in charge of promoting the training at the professional or territorial level and inciting the creation of partnerships at the regional level.
- To support not only the personalization of training courses and the recourse to new educational technologies but also the training in professional situation thanks to the development of the function of tutor.

4. The information and the orientation throughout the professional life

4.1. The professional talk and the assessment of competences

To allow the employee to be an actor of professional evolution, any employee having at least two business year in the same company profits, at least every two years, of a professional talk carried out by the company, in accordance with the provisions of an agreement of branch or company concluded on the matter or, failing this, under the conditions defined by the head of the company.

The proposals of vocational training which would be made during the professional talks can, with the agreement of the employee, be entered into an appendix to the "training passport".

Any employee can ask to profit from an assessment of competences or a validation of knowledge and competences acquired through experience, implemented during or apart from the working time and within the framework of an individual activity.

After twenty years of professional activity and, in any event, after having passed the age of forty five, any employee profits, with a minimum of one year in the employing company, of an assessment of competences acquired apart from the working time and of a priority of access to validation of knowledge and competences acquired through experience. This assessment or validation contributes to the development, by the employee concerned, of a professional project being able to give place, if necessary, to the realization of training activities.

4.2. The «training passport»

In order to support his internal or external mobility, each employee must be able to identify and make certify his knowledge, his competences and his professional capacities, acquired either through initial or continuous training, or through his professional experiences.

From this point of view, each employee can, on his own initiative, establish his "training passport" which remains his property and he keeps the responsibility to use it.

This "training passport" takes particularly into account:

- The diplomas and titles obtained during the course of initial training.
 - The professional experience acquired through training courses or training inside the company.
 - The certifications to professional purpose delivered in the form of diploma, of title or certificate of qualification, obtained within the framework of continuous training or by the validation of the knowledge and competences acquired through experience.
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- The nature and the duration of the training activities followed in the framework of continuous vocational training.
- The job occupied in the same company within the framework of a work contract and the knowledge, the competences and the professional capacities acquired.
- In an appendix and with the agreement of the employee, the decisions of training which would be made during professional talks and of assessments of competences from which the person profited.

4.3. Validation of knowledge and competences acquired through experience

In consideration of the formative character of the professional activities and in order to recognize the value of it, any employee must be able to profit from the validation of the knowledge and competences acquired through experience, within the framework of the legislative and regulatory system in force.

This agreement specifies the role of the professional branches in:

- The information on the actions of validation of the knowledge and competences acquired through the experience for obtaining certifications corresponding to sought qualifications.
 - The conditions suitable to support the access of the employees, within an individual or collective framework, to actions of validation of the assets of the experiment.
 - The methods of taking in charge the possible spending of the members who take part in a jury of validation of the knowledge and competences acquired through experience.
 - The implementation of the methods of validation and certification.
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5. Training throughout the professional life for employees

5.1. The setting up of the training throughout the professional life for employees

5.1.1. The principles of the training throughout the professional life for the employees

Each employee must be able, throughout professional life, to develop, supplement or renew qualification, knowledge, competences and professional capacities. The implementation of this principle of formation throughout the professional life is carried out particularly by:

- Actions of adaptation, training activities related to the evolution of the employment and actions of development of competences, led by the company within the framework of its training scheme.
- Contracts or periods of professionalisation.
- Development of competences of paid within the framework of the individual right to the training (DIF) from of which any employee profits each year.
- Access, on the initiative of the employee, to an assessment of competences, a validation of the knowledge and competences acquired through the experience and training activities led within the framework of the individual leave of training.
- Training activities carried out during or, for a whole or a part of it, apart from the working time of the employee.
- And, more generally, by any action of vocational training.

5.1.2. The evolution of the concept of training activity

In the strongly evolutionary context which characterizes right now the methods of development of competences in the companies will have to be favoured the individualization of the courses of training and the development of the training in professional situation and of new educational technologies, and their use. For this reason, the following actions and means must be taken into account:

- Various methods of exercise of the “tutorate” and the training in professional situation, implemented with the assistance of an employee of the company in the capacity of tutor or trainer, the charge relating only to the devoted hours by the tutor and the trainer with effective activities of “tutorate” and training like to their preparation.
- The use of communication and information technologies, of which "e-learning", insofar as they specifically aim facilitating self-tuition and individualizing the actions according to the individual situation of each employee.
- Activities of research and development on teaching engineering of the training activities.
- The costs for preparing the actions of validation of the assets of the experiment.
- The expenditure suitable to facilitate the individualization and the evaluation of the training activities.

5.2. Actions led within the framework of the training scheme of the company

5.2.1. The multi-annual programme of training

Within the framework of desirable development of anticipated management of qualifications, the training policies of the companies take into account, according to their specificities,

the objectives and the priorities of the vocational training defined by the agreements of branch. The companies have to work out and bring up to date each year a multi-annual programme of training which takes into account these objectives and priorities as well as economic outlooks and evolution of the investments, technologies and work organization (considering adaptation of the working time in the company). This programme defines the prospects for the training activities and those of their implementation.

5.2.2. The training scheme

The work's council, or failing this - the union delegates, if there are any, must deliberate on the annual training scheme of the company, taking particularly into account the possibly established multi-annual program, and be aware of the execution of this plan.

Concerning the projects of the company, the deliberation must relate in particular to the following points:

- The various types of training and the workforce concerned, by category of personnel.
- The teaching means used by distinguishing the trainings organized in the company and those organized in training centres or institutions with which the company signed, or plans to sign a convention.
- The conditions of implementation of the trainings assured on the work place.
- The budgetary prospects corresponding to these projects.
- The means of information of wage-earners within training and the methods of access to the training.

During the consultation of the work's council on the project of training scheme for the coming year, the head of company

specifies in a memorandum the nature of the training activities suggested, distinguishing:

- Those, which correspond to actions of adaptation to the working station.
- Those, which correspond to training activities related to the evolution of employment or to the maintenance in the employment of the employees.
- Those, which contribute to the development of competences of the employees.

The agreement given by the employee implies his engagement to take part with assiduity in the considered training activities. The refusal of wage-earners or the denunciation within eight days after the agreement formalized between the employee and the employer to take part in training activities carried out under these conditions constitutes neither a fault, nor a reason for dismissal.

The training hours carried out apart from the working time give place to the payment by the company of an allowance of training which corresponds to 50 % of its clear remuneration of reference and is not subjected to the legal and conventional contributions due by the employer and the employee on the remunerations. The amount of the allowance for the training paid to the employee is ascribable on the participation in the development of the continuous vocational training of the company. Throughout this training, the employee profits from the legislation of the Social Security relating to protection as regards occupational disease and industrial accidents.

The company defines with the employee, before his departure in training, the nature of engagements to which he subscribes, if the employee follows with assiduity the training and satisfy the expected evaluations. These engagements relate to the conditions under which the employee has access in priority, within one year at the end of the training, to the function

available corresponding to the knowledge he acquired and on the attribution of a classification corresponding to the occupied job. These engagements also relate to the methods of taking into account the efforts made by the employee.

5.3. Individual right to training (DIF): The individual right to training of persons employed under permanent contract

Any full-time worker, under permanent contract, profits each year from an individual right to training, of 20 hours duration, except for provisions of a branch or company agreement envisaging a higher duration. For the part-time employees, this duration is calculated with *prorata temporis*.

An agreement of a branch or a company can envisage particular methods of implementation of the DIF, contingent on the total of the open rights is at least equal to 120 hours duration over six years. This agreement can in addition provide that the hours of training related to the DIF are carried out partly during the working time and give place during their realization to the maintenance by the company of the compensation of employees.

The benefit of the individual right to training, open to any employee with a permanent contract and having worked one year minimum in the employing company, is intended to enable to profit from actions of vocational training carried out in or apart from the working time, in accordance with the provisions of the respective branch or company agreement.

Its implementation concerns the initiative of the employee, in connection with his company. The choice of the training activity within the DIF framework is decided in a formalized agreement between the employee and the employer, taking into account possibly the conclusions of the professional talk, and priorities defined by branch or company agreement.

In the absence of the branch or company agreement, the eligible training activities to the DIF concern the following categories:

- Actions of promotion.
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- Actions of acquisition, maintenance or improvement of knowledge.
- Training activities having for objective the acquisition of a diploma or a title with professional purpose, an occupational qualification recognized. The DIF is transferable in case of dismissal except for serious or heavy fault, in case of lay-off, company closure or reorganization. It is not transferable in case of retirement.

The DIF is transferable in case of dismissal except for serious or heavy fault, in case of lay-off, company closure or reorganization. It is not transferable in case of retirement.

5.4. The training leave of employees

5.4.1. The individual leave of training of wage-earners under permanent contract

The individual training leave has the aim of allowing any employee, during professional life, to follow upon own initiative, on an individual basis, the training activities of own choice, independently of participation in the actions included in training plan of the company or done in the framework of the individual right to training or periods of professionalisation.

Each employee who wishes to work out an individual professional project can be given an aid. The following supports are proposed to the salaried persons:

- An accompaniment in the choice of his vocational guidance.
- An information on the systems of training, the validation of knowledge and competences acquired through the experience and assessment of competences.
- A support with the development of its project.

The training activities can be professional or not. They can be either continuous and full-time, or part-time, or include discontinuous lessons constituting a teaching cycle; they can also include a personal working time complementary to the time of training or a period of practice in company in connection with the objectives of the training activity and, in addition to the vocational training itself, a training course in company having for object the acquisition of basic knowledge necessary to its achievement. They must make it possible to the employees to change activity, profession, or to open themselves more to culture or social life, or to reach a higher level of qualification. They must also make it possible to improve professionally.

5.4.2. The leave of assessment of competences

The leave of assessment of competences has the aim of making it possible to any employee during professional life to take part in an action of assessment of competences, independently of those carried out on the initiative of the company. This assessment of competences must make it possible to the employee to analyse professional and individual competences as the potentialities within the framework of a professional project or a training project. The action of assessment gives place to a report intended for the exclusive use of the employee.

5.4.3. The teaching leave

Under the only condition that they have more than two years of paid work in the company, the employees can ask for authorizations of absence without maintenance of wages to exercise the functions of teaching in an educational establishment or in a training organization:

- Either full-time during less than one year.
- Or part-time: the absence of the company then must not exceed eight hours per week or forty hours per month.

5.5. The use of the time-saving account (CET) for training

The CET (*compte epargne-temps*), which can be used for training purposes, is meant to allow the salaried persons to accumulate the paid days of leaves or saving in money. The CET system is set up according to a convention or a collective agreement, and the value of CET is expressed in days of leave or in money. The salaried persons can use it either to have money during the period of inactivity, or to benefit from an immediate or deferred payment. (Specific procedures are foreseen in the case of break of the job contract.) Ultimately, CET can also be used for formation purposes. The value of CET is established on the basis of:

- The carrying forward of the legal and conventional annual paid-leaves within the 10 days limit per year.
- The hours of rest acquired with the overtime.
- The overtime carried out beyond the weekly duration of work.
- Part of the days of rest resulting from the collective reduction from the working time.
- Whole or part of conventional bonus, allowances of end of contract or end of mission or bonus of profit-sharing.
- And, more generally, of any element defined by a convention or a collective agreement.

6. The development of the "professionalisation" of the young people, the unemployed and certain employees

6.1. The implementation of the «contract of professionalisation» for the young people and the unemployed

A «contract of professionalisation» is set up. Its object is to support the insertion or professional reintegration of the young and the unemployed. The «contract of professionalisation» is open for:

- Young people under 26 years of age without occupational-qualification and wanting to supplement their initial training,
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whatever the level, to be able to accede to the job desired.

- Unemployed people, immediately after their inscription at the National Agency for Employment (ANPE), when professionalisation proves to be necessary to support their return towards employment.

It aims to make it possible to its recipient to acquire a diploma or a title with professional purpose, an occupational qualification.

This contract is implemented on the basis of the following principles:

- A personalization of the training courses, according to knowledge and experiences of each recipient.
- An alternation combining sequences of vocational training, in or out of the company, and the exercise of one or more professional activities, in relation with the qualifications wanted.
- A certification of knowledge, competences and professional capacities acquired.

The «contract of professionalisation» is a contract of employment of a particular type, with a given or unspecified duration. When the contract is a fixed term contract, it is concluded for a duration from 6 to 12 months. When the contract is a permanent contract, the duration of the «period of professionalisation», during which are implemented the actions of professionalisation is contained between 6 and 12 months.

These durations can be carried up to 24 months for:

- Specific public, in particular young people having left the educational system without recognized occupational qualification.
- Special certifications or specific trainings.

The employer commits himself, throughout the given duration contract or the «period of professionalisation» of permanent contract, to provide to the individual a professional occupation in relation to the

objective of professionalisation and to ensure him a training which gives access to him to an occupational qualification. The recipients of these contracts can, if necessary and with their agreement, carry out an assessment of competences.

The holder of the contract commits himself to work for the account of his employer and to follow the training planned in the contract.

Any «contract of professionalisation» can give place, as of its conclusion, to an evaluation of the salaried person, which aims to define the activities of accompaniment and training adapted to the profile of the recipient of the contract.

The employer determines with the employee, during a talk, in which the tutor participates, and in connection with the training centre, the objectives, the program as well as the conditions of evaluation and validation of the training.

When the qualification concerned is an occupational qualification recognised, the precise details are the subject also of a written document, annexed to the contract. The actions of evaluation, of personalisation of the course of training, external accompaniment and training, according to the contract, must be at least of a duration equal to 15 % of the duration of the contract or «period of professionalisation», and not lower than 150 hours. The training activities are implemented by a training centre or, by the company itself when it has the recognised and structured training facilities.

The trainings given by a training centre are the object of a convention with it, concluded before the start of these actions. At the end of the contract or «period of professionalisation», the employer, in connection with the training centre, having signed the convention, ensures himself of the presentation of the holder of the contract to the tests envisaged. The holder of the contract is held to stand up to validation and evaluation proof of the qualification concerned.

6.2. Implementation of the «period of professionalisation» for employees of the companies

This period is open to employees, whose qualification is insufficient

in comparison with the evolution of technologies and the organizations, in accordance with the priorities defined by the professional branch, like:

- Those, who, after twenty years of occupation and, in any event, as of their forty-fifth birthday, provided that they worked the minimum of one year in the company employing them, wish by this professionalisation to consolidate the second part of their professional career.
- Those, who consider the creation or the resumption of a company.
- Women, who take again their occupation after maternity leave or men and women after a parental leave.
- Handicapped workers.

This «period of professionalisation» aims to allow its recipient:

- To acquire a diploma or a title with professional purpose, a vocational qualification recognised.
- Or to take part in a training activity whose objective of professionalisation is defined by the national Joint Committee of the use of the professional branch of the company.

This «period of professionalisation» is implemented on the basis of the following principles:

- Personalisation of the course of training, according to knowledge and experience of the recipient.
- An alternation combining the sequences of vocational training, in or out of the company, and the exercise of one or more occupations, linked with the qualifications wanted; the follow-up of this alternation is ensured by a tutor.
- An evaluation of competences and acquired professional capacities.

When the period is addressed to an employee in activity, it can give place, in precondition to its implementation, to an action of validation of the knowledge and competences acquired through the experience,

carried out during the working time.

Any, concerning an employee, public priority can, with the agreement of his employer, profit of one «period of professionalization».

7. The specific access to the training of some employees

7.1. The differed qualifying training

To ensure equity, the employees, who stopped their initial training before or at the end of the first cycle of the higher education, and in priority those who did not obtain recognised vocational qualification, and who wish to continue later on studies for social advancement, should have access to qualifying trainings with maximum total duration of one year, implemented in particular within the framework of the individual leave of training. With the aim that these trainings allow the employees a significant increase in their vocational qualification, they will be able to profit:

- Of one aid to the development of their professional project, with the support of an accompaniment in or out of the company and of an assessment of competences.
- Of the validation of the assets of their experiment before following the qualifying training corresponding to their project.

7.2. The continuing training (in-house training) in SMEs and handicraft companies

Because of the number of their manpower and of the characteristics of their organisation, these companies have sometimes specific difficulties to implement their training activities, in particular when they result in the unavailability of some employee.

Given the major role of these companies in employment, it is fundamental to set up, in particular at the respective territorial level, of the systems adapted to their situation to encourage them and help them to develop the training activities of their employees. Actions of information of the young people and employees will be carried out on the needs and the means of the training.

7.3. The equality of access to vocational training between men and women

It is necessary to support equal access of the men and the women to the continuous vocational training, which constitutes as well as the development of education and the fight against discriminations in the trades, an essential factor of the development of the equality between the men and the women.

The companies have to support the access of women:

- To the systems of training, validation of knowledge and competences acquired through experience or assessment of competences.
- To the contracts and the periods of professionalization.

8. The Provisions relating to the reception, the tutoring and the missions of teaching

8.1. The missions of reception and the teaching missions

When a mission of reception or a teaching mission is given to qualified employees and to the managerial staff, this will be exercised within the following frameworks:

- Training courses or periods of training in company.
- Contracts and periods of professionalisation.
- Apprenticeship.

The person in charge for training course defines the methods of execution of the training course or the period of training in company and, if necessary, its contents. He takes part in the acquisition of theoretical and practical knowledge envisaged in the convention of training course and to the evaluation carried out at the end of the period of training course or training in company.

8.2. The development of the function of tutor

The development of the function of tutor increases the quality and

the effectiveness of the actions led within the framework of the systems of vocational training.

The tutor is appointed by the employer, on the voluntary basis, among the qualified employees of the company, taking into account their employment and level of qualification, which must be adequate to the objectives retained for the training activity. The tutor must have a professional experience of at least two years. In the small companies, the tutor can be the employer himself.

The aims of the tutor function are:

- To accompany the employee in the development and the implementation of his professional project.
- To help, inform and guide the employees of the company, who take part in training activities within the framework of the contracts or the periods of professionalization.
- To contribute to the acquisition of knowledge, competences and professional capacities by the employee concerned, through training activities in professional situation.
- To take part in the evaluation of the qualifications acquired within the framework of the contract or the «period of professionalization».

The name of the tutor, his role and the conditions of exercise of his mission are mentioned in the «contract of professionalisation». The tutor follows the activities of three employees at most. He has the responsibility of the action for the entire period of time appointed.

He ensures, under the conditions envisaged by the contract or the period of professionalisation, the connection between the training centres and the employees of the company, who take part in the skill acquisition by the beneficiary or initiate him to various professional activities.

The tutor and the training centre check periodically that the followed sequences of vocational training and the activities carried on by the recipient of the contract or the period of professionalisation proceed under the conditions initially envisaged.

To allow the exercise of these missions, while continuing normal employment in the company, the tutor, taking into account the responsibilities borne, must have time necessary to the follow-up of the beneficiaries of the contract or the period.

To support the performance of this tutor function, the employee must have profited, previously, of a preparation and, if necessary, of a specific training.

8.3. The prospective trade research institutes and the qualifications

To accompany the companies in the definition of their policies of training and the employees in the development of their professional projects, a prospective trade and qualifications research institute, at national, regional and territorial jurisdiction, is set up.

9. The law of December 5, 2003

The law of December 5, 2003, takes again the terms of the inter-professional national agreement and specifies that:

- The vocational training throughout the life constitutes a national obligation.
 - The continuous vocational training has the aim of supporting the insertion or the professional reintegration of the workers, to allow their maintenance in employment, to support the development of their competences and the access to the various levels of the occupational qualification, to contribute to the economic and cultural development and their social advancement.
 - It also aims at allowing the return to the employment of the people who stopped their occupation to take care of their dependent family members.
 - The actions of adaptation and development of competences of the employees have the aim of supporting their adaptation to their work place, to the evolution of employment, to the maintenance in employment, and participate in the development of competences.
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- The State and the regions contribute to the exercise of the right to the qualification, in particular for the people not having acquired qualification recognized within the framework of the initial training.
- The handicapped people have access to the whole of the systems of training in the respect of the principle of equal treatment, by taking suitable measurements. They profit, if necessary, of specific actions of training having for object their insertion or their professional reintegration, to allow their maintenance in employment, to support the development of their competences and the access to the various levels of the occupational qualification and to contribute to the economic and cultural development and the social advancement.
- The actions of fight against the illiteracy and the training of the French language belong to the vocational training throughout the life.
- In order to ensure the replacement of one or more employees in training, in the companies of less than fifty employees, the State grants to the employers a help calculated on the basis of minimum wage for each person recruited to this end or setting at their disposal by companies of temporary work or groupings of employers.
- The employer has the obligation to ensure the adaptation of the employees to their work places. He takes care of the maintenance of their capacity to occupy an employment, in relation, in particular, to the evolution of employment, technologies and organisation. He can propose trainings which take part in the development of competences.

2.2 Some conclusions, problems and approaches

The national reports presented before highlighted mainly, though not exclusively, the formal and organisational side of the Lifelong Learning “infrastructure” in particular countries, starting with the understanding of the notion. Thus, we have seen numerous statements and formal,

as well as legislative provisions, pertaining first of all to the overall policies and strategies, and to the institutional settings. Some comments forwarded in these reports indicated the main areas, where problems exist or arise. It is natural that these problems vary from country to country, from society to society, given different economic conditions, historical experiences and cultural backgrounds. These may even deeply differ across regions within one country.

Summing up these national accounts, we can state the following:

- The need for and the importance of Lifelong Learning is widely recognised, even though this is translated into effective action to a distinctly varying degree and in quite different manners.
 - This recognition is primarily expressed from the point of view and point of actual execution (“implementation”) of the authorities, notably the central authorities (e.g. the frequency of reference to the ministries of education and of labour); other partners, such as employers, NGOs, local communities (often seen through local and self-governmental authorities) as well as individuals, are mentioned mainly as “participants” of the respective processes, to be included, motivated, supported, etc., even if they are claimed to be the “hosts” of these processes.
 - The differentiation observed across countries is definitely a function of national wealth, along with the more general educational and social care infrastructure; it is also a function of traditions, culture, experience and the current social and economic situation; the role of these factors, even though hard to assess, may in some cases be decisive.
 - This differentiation appears, in particular, in the way in which Lifelong Learning is perceived in the perspective of the “tangle of paradigms”, in distinction from the general recognition of need and importance, mentioned before (such keywords appearing frequently as “labour market chances”, “competitiveness”, or “knowledge society”).
 - The differentiation observed appears also in terms of the de-
-

gree and manner in which various “participants” of the respective processes are involved and form effective social networks.

- The problems encountered may roughly be classified between the “supply” and “demand” domains; thus, on the “**supply**” side, we can cite the following three main categories of problems: **(1)** general availability (existence), **(2)** accessibility (especially across space and in terms of finance), **(3)** matching of both the labour market situation and the actual demand from the broad public and the social partners, in terms of both the profile of supply and the provision of information on it; and on the “**demand**” side: **(1)** the internal motivation to and the habit of learning; **(2)** the perception of learning as a way to achieve definite goals, in particular – related to career and upkeep; **(3)** the very capacity of learning; and also **(4)** the awareness of the possibility of use and the accessibility of education.
- Concerning *solutions*, the instruments that are called for are, in a more or less obvious way, of *institutional* (special institutions and organisations, new roles for the existing ones, coordination and support for networks, etc.); *financial* (special goal-oriented funds, extension of purpose-oriented financing for the already existing projects and organisations, application of appropriate funding and fund allocation schemes and criteria, etc.); *promotional* and *awareness-raising* (appropriate public campaigns, upgrading of certain functions and institutions, prizes and nominations, etc.), *information* and *technology* related (databases, advisory systems, new teaching technologies, etc.).

In the quest for the critical factors and the ways to deal with them, the above general conclusions would have to be made more pragmatic. It is obvious, though, that the entire area, even if “just” speak of the issues concerning these conclusions above, is highly complex and involves a multitude of elements and factors, and a complicated interplay of those. That is why in the subsequent chapter of the report we will first present a structure for consideration, originating primarily from the French experience. Then, our analysis will go beyond this structure, though basing on the set of notions and some of the relations therefrom.

3

the critical factors

the
critical
factors

This is the *key chapter* of the report, containing the main body of output from the work of the Working Group, both while in-session and between the meetings. We start with the structure that encompasses what can be called “life project”, in which Lifelong Learning is the major concern (a more detailed description of this structure is given in Section 3.1.5). This structure, which then takes the form of a matrix, provides the framework that can be used to (I) place properly the activities of the various projects represented in the Working Group (and thus also a broader context, in which these projects operate), and (II) to provide the universe of notions, which are then used in further analysis. This analysis proceeded through a brainstorming session, in which the essential, focal notions were elicited, and then around them work was organised, meant to highlight the understanding, the problems, obstacles, gaps etc. Thus, the critical factors could be identified and explained, even if not “resolved” in the sense of providing ready-made answers to questions that arise.

3.1. The structure for consideration and the analysis

3.1.1. The basic notions

We will now introduce, on the basis of the elaboration from the French partner, the set of basic notions, which is then presented in much greater detail in Section 3.1.5, as a kind of “glossary”, formulated mainly from the point of view of the French perspective, largely, actually, formalised. The notions here introduced are then filled for the national partnerships and projects, taking part in the preparation of the present report.

It should be emphasised that not only the set of notions here introduced is based on some formalised approach, but also, that this approach takes a very concrete perspective on Lifelong Learning, with great emphasis on “conscious project building and realisation”.

This perspective is closely associated with the fact, that the “vocabulary” of notions is oriented primarily at “vocational guidance” or “professionalisation”, meaning insertion into the labour market.

Such a perception of Lifelong Learning is definitely only partial, applying to only a limited segment of the Lifelong Learning, and

even within this “job market insertion” segment it is in reality in a vast proportion of cases implemented only in some elements (the corresponding conscious choices being made in a step-by-step manner, without any detailed “life project” in mind), even if the respective “project” turns out to be successful.

Yet, we will be using it as the basis for presentation of particular aspects of Lifelong Learning, not insisting on its general “ideological” or “conceptual” validity.

First, the steps of life project building are deployed in terms of their respective component parts or factors contributing to realisation of these steps:

Steps of project building:

MOTIVATION

- Information.
- Fight against discriminations.
- Social responsibility.
- Learning to learn.
- Analysis of job market.
- Life project.

VOCATIONAL GUIDANCE

- Self-awareness.
- Exploration of the world of work.
- Mature decision making.
- Integration:
 - Social.
 - Vocational.
 - Integral.
- Guidance talks and counseling.
- Trade and employment.
- Vocational Project.

PATH BUILDING

- Capacity, vocational competence.
 - Learning and outcomes.
 - Vocational positioning and training project.
-

- Securing of the vocational path.
- Securing of the training path.

TRAINING

- Objectives and pedagogy.
- Teaching engineering.
- Learning system:
 - Teaching organization.
 - Teaching method.
- Teaching resources and Base of skills.
- Evaluation.
- Tools of training and following-up.
- Vocational Tutor.

VALIDATION

- Formal and non formal and informal learning.
- Qualifications and levels.
- Method of validation.
- Social and vocational recognition.

PRACTICAL PROOF

The process of building the life project is deployed and realised within the environment, composed of various actors:

- The individual (definitely, while the other actors listed are facultative).
- Family-Neighbourhood.
- Non-profit organisations.
- Two sides of industry.
- Training organisations.
- Companies.
- Professional branches.
- Employment offices.
- State and communities.

The Lifelong Learning process, when perceived from the angle that constitutes the basis for the here presented “vocabulary”, is primarily

oriented at definite categories of population (although in general it simply applies to *everybody*):

the Jobless and the Employed / Salaried.

classified, for the purpose of focussing the potential action, into:

Disabled / Migrants / Women / Others.

3.1.2. The matrix and the contributions of the projects involved

The “universe of discourse”, defined by the notions introduced before and explained at length later on in Section 3.1.5, serving to enlighten the mutual relations between various constituents, actual, or potential, of Lifelong Learning (or at least its segment, associated with vocational education and job market insertion), constitutes the background or the framework, within which the further considerations take place.

First, against these notions the matrix will be presented, which illustrates the explicit domains and the implicit reaches of the projects, represented on the Working Group, and thus also the competences of the involved staff. This matrix shows, therefore, on the one hand, the *degree of coverage* of the entire Lifelong Learning universe by the projects represented, and, on the other hand, the *degree of overlapping* between various projects. Both these characteristics are essential for the analytic work of the group and its output.

The first one shows, first, the overall degree of representation of the competences involved for the entire area of the Lifelong Learning, and therefore the degree of relevance of the considerations here contained. The second – corresponds to the synergy within the group and among various projects, be it only in terms of potential collaboration.

(Let us add at this point that although the matrix does not contain yet another dimension of competence, namely that of “education” [*medice, cura te ipso??*] of the Working Group members, even at the purely declarative sense, it is assumed that these “educational background”-derived competences match appropriately the respective entries of the matrix).

MATRIX POSITIONING FOR ALL THE COUNTRIES' PROJECTS

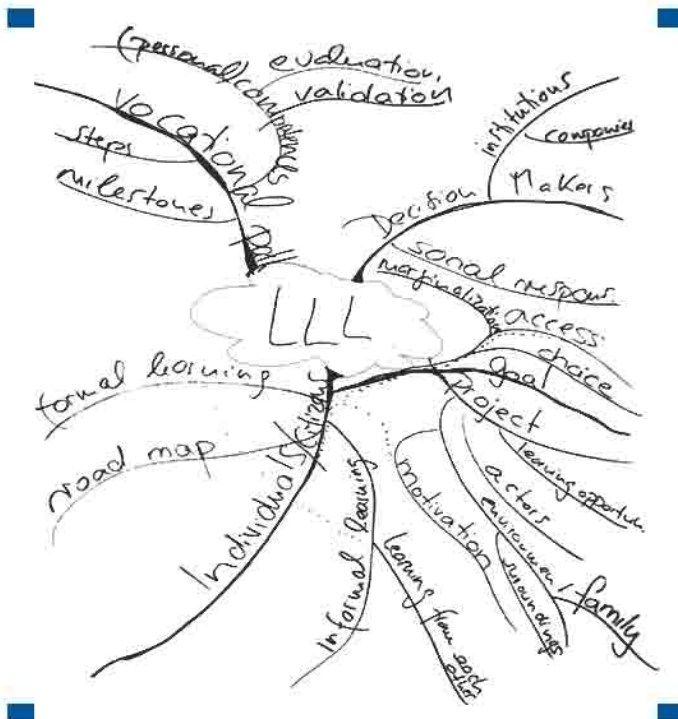
A = Austria D = Germany Fr = France Pl = Poland Sl = Slovakia

STEPS OF THE PROJECT		PROJECT																	
		1. MOTIVATION			2. VOCATIONAL GUIDANCE			3. PATH BUILDING			4. TRAINING			5. VALIDATION					
		a) Information b) Fight against discriminations c) Social responsibility d) Learning to learn e) Analysis of job's market f) Life project			a) Self-awareness b) Exploration of the world of work c) Mature decision making d) Integration Social Vocational Total e) Guidance talks and counselling f) Trade and employment g) Vocational Project			a) Capacity, vocational competence b) Learning and outcomes c) Vocational positioning and training project d) Securing of the vocational path e) Securing of the training path			a) Objectives and pedagogy b) Teaching engineering c) Learning system Teaching organization Teaching method d) Teaching resources and Base of skills e) Evaluation f) Tools of training and following-up g) Vocational Tutor			a) Formal and non formal and informal learning b) Qualifications and levels c) Method of validation d) Social and vocational recognition					
POPULATION CATEGORIES	Jobless			Salaried			Jobless			Salaried			Jobless			Salaried			
	Disabled Migrants Women Others	Disabled Migrants Women Others	Disabled Migrants Women Others	Disabled Migrants Women Others	Disabled Migrants Women Others	Disabled Migrants Women Others	Disabled Migrants Women Others	Disabled Migrants Women Others	Disabled Migrants Women Others	Disabled Migrants Women Others	Disabled Migrants Women Others	Disabled Migrants Women Others	Disabled Migrants Women Others	Disabled Migrants Women Others	Disabled Migrants Women Others	Disabled Migrants Women Others	Disabled Migrants Women Others		
ACTORS	Individual	Fr Fr Fr D Sl Sl D	Fr Fr Fr A A A D	Pl Pl Pl Pi Pi Pi A	Fr Fr Fr D Sl Sl D	Fr Fr Fr Pi Pi Pi D	Fr Fr Fr D Sl Sl D	Fr Fr Fr Pi Pi Pi D	Fr Fr Fr D Sl Sl D	Fr Fr Fr A A A D	Fr Fr Fr D Sl Sl D	Fr Fr Fr Pi Pi Pi D	Fr Fr Fr A A A D	Fr Fr Fr D Sl Sl D	Fr Fr Fr Pi Pi Pi D	Fr Fr Fr A A A D	Fr Fr Fr D Sl Sl D	Fr Fr Fr Pi Pi Pi D	
	Family-Neighbourhood	D	D		D		D		D		D		D		D		D		D
	Non profit organisation	D	A D A A A	D D	D	A D A A A	D D	A D A A A	D D	D	D D	D	A D A A A	D D	D	A D A A A	D D	D	A D A A A
	Two sides of industry																		
	Training institutions	Fr Fr Fr Fr	D D			D D		D D	Fr Fr Fr Fr	D Pi Pi D	Fr Fr Fr Fr Pi Pi Pi	Pi Pi Pi D D D	Fr Fr Fr Fr Pi Pi Pi	Pi Pi Pi D D D	D	D D D	D	D D D	
	Companies	Fr Fr Fr Fr	A D Pi A A D A	Pl Pi	Fr Fr Fr Fr D	Fr Fr Fr Fr D	A D Pi A A D A	Pl Pi	Fr Fr Fr Fr D	D	Fr Fr Fr Fr Pi Pi Pi D	A D Pi A A A	Pl Pi	Fr Fr Fr Fr Pi Pi Pi D	A D Pi A A A	Pl Pi	D	D Pi D	
	Professional branches		A D A A A	D D		A D A A A	D D		A D A A A	D D	A D A A A	D D		A D A A A	D D	A D A A A	D D		A D A A A
	Employment offices	Fr Fr Fr Fr Sl Sl			Sl Sl				Fr Fr Fr Fr Sl Sl		Fr Fr Fr Fr Sl Sl			Fr Fr Fr Fr Sl Sl					
	State and communities		A D A A A	D D		A D A A A	D D		A D A A A	D D		A A A A A	D D		A D A A A	D D		A D A A A	

3.1.3. The points of focus

The following is the output from a “brainstorming” session, which took place during one of the meetings of the Working Group. The main subject was the *set of basic notions* to be incorporated when considering Lifelong Learning and interrelations among them (although the latter to a much more modest degree). These should be seen in the light of the *notion structure* presented before.

The session started with the outline for the collection of basic notions and their relative “positioning”. This was followed by the specification, on the previous basis, of the *organisations/actors* that the participants wanted to see accounted for. Then, the set of *target groups* was specified, within the same framework.



Once these categories of notions specified, it turned out possible to make the very first step towards common understanding, at least in

Photo: The output from the first part of the brainstorming session devoted to elicitation of the notions basic for the Lifelong Learning domain in the perspectives of the participants.

the sense of attachment of significance to the particular notions, as they have been understood by the participants. For this purpose, each country representation was supposed to distribute 15 points according to the perceived significance of particular notions. The resulting “ranking” of notions is telling, even if it is just a first approximation.

Thus, as a result from the brainstorming session of the Working Group a backbone for further work, and in particular for the more in-depth analysis of Lifelong Learning and the crucial factors thereof in partnership countries was achieved in the form of a partly structured list of notions.

The lists of the basic or crucial notions, in accordance with the scheme adopted (Lifelong Learning as a whole, actors/organisations; target groups) resulting from the sessions are as follows:

Lifelong Learning as a whole

- Decision makers
 - Social responsibility.
 - Institutions:
 - Companies.
- Individuals/Citizens
 - Projects.
 - Formal learning.
 - Informal learning:
 - Learning from each other.
 - Road map.
 - Goal:
 - Project:
 - Learning opportunities.
 - Actors.
 - Environment:
 - Motivation.
 - Family.
 - Surroundings.
 - Access:
 - Marginalisation.
 - Choice.

- vocational path
 - Steps.
 - Milestones.
 - Personal competencies:
 - Evaluation.
 - Validation.

Actors/organizations

- Companies.
- Labour offices.
- NGOs:
 - Profit.
 - Nonprofit.
- Trade unions.
- Professional branches.
- Educational sector.

Target groups

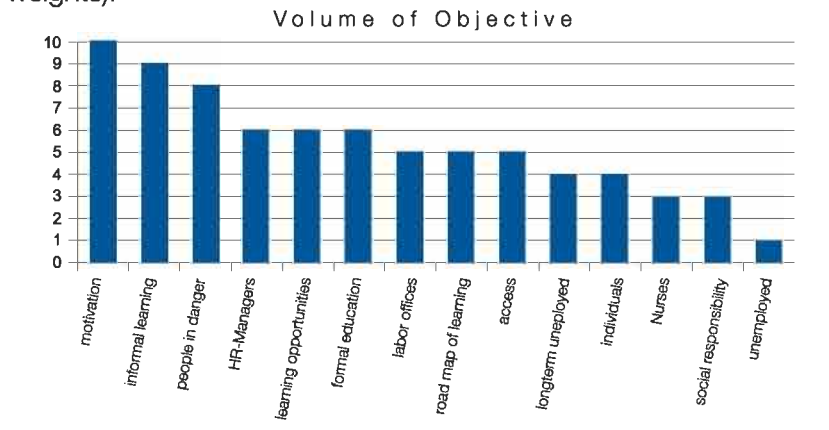
- Migrants.
 - Nurses/physicians, administration, social service.
 - Employees.
 - Unemployed.
 - Restructuring SMEs (managers).
 - People in danger of losing job.
 - Long-term unemployed.
 - 45+.
 - Disabled person.
 - Women.
 - Unskilled workers.
 - Executive staff.
 - People after maternity leave.
 - HR managers.
-

As mentioned before, the notion elicitation phase was followed by the assignment of weights, according to the perception of importance of the particular notions. Each country representation was asked to distribute 15 points among the notions listed, so as to possibly well reflect the perceived relative importance of these notions.

The table below shows the distribution of points as it was obtained from the individual country representations and then – in the last column – summed up.

NOTIONS	POLAND	AUSTRIA	GERMANY	SLOVAKIA	ITALY	WEIGHTSUM
motivation	4	3	3			10
informal learning		3	3		3	9
people in danger	3	3			2	8
HR-Managers	3	3	3			6
learning opportunities	1		3			6
formal education					5	6
labor offices				5		5
road map of learning				5		5
access					5	5
longterm unemployed				4		4
individuals	4					4
Nurses		3				3
social responsibility			3			3
unemployed				1		1

It can definitely be said that although the exercise was fully “spontaneous”, based on experience and project-orientation of the participants, without refined distinctions and, say, cross-impact matrices, some important conclusions can be drawn from the results (see also the diagram below for the summary presentation of total weights):



- A severely limited number of notions was assigned points by the participants (note that only three notions out of nine that got any points received them from just one national representation).
- There is a very clear ranking of the notions, resulting from the exercise.
- This ranking results not only from the numbers of points assigned by the particular country representations, but, primarily, from the number of representations that “voted” for a particular notion; note that, in the sequence of the ranking, the numbers of these representations were: 3, 3, 3, 2, 2, 2, 1, 1, 1, and that despite the fact that the last notions in the ranking obtained, “per score”, much higher assignments than on the average (e.g. the last one obtained 5 points in a single “shot”, while the average point assignment across the table is 3.33).

All this amounts to a very telling result in the sense of attaching importance to the particular elements or factors, and so the problems that are associated with them. Beyond any doubt **motivation** comes forth as the most important critical factor for the Lifelong Learning.

3.1.4. The perspectives

In this manner we have established the structure, necessary for the coherent discourse and analysis, and perhaps even synthesis, that is – for the perception of and the insight into the “universe of discourse”, and then distilled out of it the notions of special importance and interest, being the candidates for the critical factors. A selection of these notions was then highlighted in terms of both understanding and experience, as resulting from the national projects involved. This exercise took a form of a quasi-questionnaire, composed of the following items:

1. Motivation

What do you consider as the positive learning conditions? What facilitates the learning processes?

.....

2. Formal / informal learning

Which kind of *formal learning* and *informal learning opportunities* does your project provide?

3. Modularisation

Is your project divided into modules? Do your beneficiaries have any opportunity to choose the composition of modules? Can they choose from several potential modules?

- Which reasons/conditions impede working in modules?
- What reasons/conditions facilitate working in modules?

4. Certificates/recognition

- What kind of certification does your project provide?
- Which significance does certificate imply to your project?
- How do you assess [respective] competences?

5. Access

- Who has access to your project?
- Who has not and why?

6. Understanding of learning

- What is the specific understanding of learning in your project?
- How does it show?
 - How can you identify different understandings of learning?
 - How can you "prevent" from learning?
 - How can you support learning?

7. Learning environment

- Did you choose a special learning environment / arrangement for your project?
- Do you see any reason for varying or changing learning environments?

8. Life choice

- Have you an instrument for the right/best choice for the study target?
 - How can you identify people's needs in the sense of study or skill improvement?
-

1. Motivation

What do you consider as the positive learning conditions? What facilitates the learning processes?

Austria	France	Germany
<p>Most important is intrinsic motivation and the benefits seen in Lifelong Learning. We want to encourage nurses to 're-like' their job and to motivate themselves (and the system behind them, all the health care institutions and organisations and managers in this branch) to stay capable and employable to do that specific & difficult job.</p>	<p>The motivation of all the partners to take part in the network and to make it run is a key factor of the project. The network is intended for training institutions, labour offices, firms. Tools will be set up to make awareness campaign and to promote the interests of the firm to get involved in the network.</p>	<ul style="list-style-type: none"> - Personal responsibility. - Ability to make decisions. - Fitting learning environment. - Cognitive challenge.
Italy	Poland	Slovakia
<p>The learning conditions in the VARCO PROJECT are shaped by means of a formative process, meant to guarantee a group of competences. The motivation for formation is created by means of a key figure, who is the VARCO consultant with the job of giving value to human resources. The model and instruments are in an experimental phase.</p>	<ul style="list-style-type: none"> - Internalised conviction as to the value (necessity) of taught / learned knowledge and skills (stemming from various sources, including: family background, own experience, labour market situation). - Good "neighbourhood" examples (if the Joneses can, so do I). - Matching of the teaching/learning conditions (forms & contents) to the target population in general and individual capacities & needs in particular (facility, interaction, coaching). 	<p>Our project does not work with people directly. In our project we are creating an expert system that should help employees of labour offices to give better advice to their clients (the unemployed) in the field of their future learning activities. In this sense, we can facilitate learning process with most adequate course choice.</p>

2. Formal / informal learning

Which kind of *formal learning* and *informal learning opportunities* does your project provide?

Austria	France	Germany
<p>The formal one is: that the managers and heads in the health care system understand they must make personnel development; to support them in seeing that their staff pays attention to their own health as well and that professional career planning & performance management can be a strategy against burn-out, high fluctuation, sick nurses and unmotivated & unsatisfied employees; and to encourage them that take responsibility for their staff (human capital).</p> <p>The informal is: that individuals see that that new tool and the systemic view on the Austrian health care system must find a solution and that they must take their occupational future in their own hands, and to encourage them to take some time for reflecting on their own situation, resources, stresses and strains.</p>	<p>The formal and non formal learning are not a primary goal of the project, nevertheless tutors will be trained to further the non formal learning by the job seekers who will make a practice in their firm. Tools will be given to the tutors to trigger the job seeker to ask him/herself questions, to make a step in the building of his/her vocational project.</p>	<p>We choose a learning arrangement which provides and brings forth informal learning, so our project focus is on informal learning opportunities.</p>
Italy	Poland	Slovakia
<p>The VARCO project foresees informal and formal formation. The model is created by laboratories that should contain the proper instruments for learning. As of this writing (summer 2006) it is in an experimental phase.</p>	<p>Our project (RENOWATOR) provides a portfolio of essentially formal learning within a relatively close-interaction framework, and encouragement for the informal learning.</p>	<p>Project does not provide any additional opportunities for learning. It uses the established courses offered by Labour Offices. Courses are provided by third party organisations, Labour Offices supply them only through tenders.</p>

3. Modularisation

Is your project divided into modules? Do your beneficiaries have any opportunity to choose the composition of modules? Can they choose from several potential modules?

- Which reasons/conditions impede working in modules?
- What reasons/conditions facilitate working in modules?

Austria	France	Germany
<p>Hospitals get some training according to modules.</p> <ul style="list-style-type: none">- In Module 3 (KDZ) the target group (mainly nurses) will learn in a new curriculum coaching methods & counselling techniques; developed especially for their needs & job situation.- In Module 4 (Human Health Design) the employees in 15 hospitals take part in some workgroups concerning their daily business & the systematic exchange on their work; the target group take part when they have time or are interested in the special topic.- In Module 5 (AMZ) project partners do a project on workplace health promotion in one big Viennese hospital; the employees can take part there in whatever they want or have time and interest. <p>Of course, free choice and the given permission of the management and commitment of those institutions are a good basis for learning – see also 7.</p>	<p>There are modules for the tutors' training:</p> <ol style="list-style-type: none">1) obligatory modules, concerning the activities of the core job of tutor.2) optional modules: peripheral themes (ex: equality of opportunities for men and women, etc.).	<p>Our project is divided into three modules. Our beneficiaries do not have a possibility to decide about the modules. The composition of the modules is chosen by our co-partner.</p>

Italy	Poland	Slovakia
Not provided.	<p>Yes, the learning and coaching/accompanying program of the project is divided into modules.</p> <ul style="list-style-type: none"> - Impediments come primarily from the additional organisational and content-related effort needed to appropriately define modules and to secure their mutual as well as overall organisation; there is also the issue of compliance with the actual or hypothetical system of skill classification and definition; finally, there are cases where introduction of modules can only be artificial and detrimental to the outcome of the learning process (some skill or domain forming a coherent and synergistic whole). - Modules are often natural component parts of teaching-learning, or of a skill; as such they are usually recognised by those knowledgeable about the domain and its practical use, as well as trade practices. 	Not provided.

4. Certificates/recognition

- What kind of certification does your project provide?
- Which significance does certificate imply to your project?
- How do you assess [respective] competences?

Austria	France	Germany
<p>For the courses / training / curriculum the participants will get certificates; but those are informal documents and can – probably – bring the employees a higher satisfaction, self-confidence and better occupational career planning (as our Module 2 with the screening tool).</p>	<p>The firm will be accepted in the network only if it has got a tutor who has followed a training to become a tutor. The training will recognise the acquired competences by a certificate of tutor.</p>	<p>We do not provide certifications.</p> <p>Intercultural competences are assessed by a questionnaire.</p> <p>At the beginning and at the end we offer the same questionnaires, so we can observe the difference between state of the competences at the beginning and the change process until the end of our modules.</p>

Italy	Poland	Slovakia
<p>No, the project at the moment does not provide for certification.</p>	<p>There are, generally, several kinds of certificates granted within the project:</p> <ul style="list-style-type: none"> (1) for having taken part in a workshop devoted to the use of definite technologies. (2) for having taken part in a course (module). (3) for terminating positively the course after some kind of test. (4) for having done a practical stage of 2-4 months within a working environment. <p>Certification defines to a significant degree organisation of the project (learning paths and their nodes); of special meaning is the full length of the path (certificate no. 4 above), which implies quite an effort on the side of project participants, but also suggests the highest value of the learning to the beneficiaries.</p>	<p>Our project provides no certificates. Naturally, each course ends with a certificate, if it is asked for in the respective tender. The certificate is reached with the help of the third party teaching company and certification process is provided by an independent certification organisation.</p>

5. Access

- Who has access to your project?
- Who has not and why?

Austria	France	Germany
<p>Mainly nurses with physical and psychological strains (= more EQUAL target group), but also multiple decision-making members of other health services (therapists, HR managers, doctors, governance etc.) are in our target group as well (in implicit terms and in some project parts directly).</p> <p>Problematic are specific target persons with obvious disabilities – we did not find many in daily work there but in the end, such persons will have benefit of all our project-work as well (we think so). E.g. if foreign nurses want to work here they must have a 'nostrification' (=special recognition) of their education as nurse. And we try to deal away with the barriers, so the programming must be easy in wording and practice.</p>	<p>Labour offices, training institutions, and firms have access to the project, along with the job seekers.</p>	<p>The "employees" of our co-partner, a transfer company for the persons having lost their jobs.</p>

Italy	Poland	Slovakia
<p>Access is proposed to workers at risk of discrimination / marginalisation, women, handicapped men and women over the age of 45.</p>	<p>There are quite precisely defined target groups (employed people past 45 years of age from SMEs threatened with restructuring, women past maternity leaves, etc.); the primary criterion of access is the activity on the side of the potential beneficiaries; another, technical criterion is the access to the internet (not necessary in theory, but almost 100% in practice); which is, anyway not so strange, since the project aims at "information society" skills. Yet another technical criterion is membership of the respective SME in a kind of association or network that is / are promoting the project and / or participate in it. Lack of access applies to those, who do not fulfil these criteria, and first of all own active attitude.</p>	<p>Project and its output (expert system) is directly dedicated for employees of the labour offices to help them in their work and establish a new way of communication for experience sharing. Indeed, the project is definitely ultimately dedicated to unemployed persons.</p>

6. Understanding of learning

- What is the specific understanding of learning in your project?
- How does it show?
 - How can you identify different understandings of learning?
 - How can you "prevent" from learning?
 - How can you support learning?

Austria	France	Germany
<p>We address the EQUAL 'empowerment' approach; i.e. an individual working in health care should learn the importance of preventive approach and that they will end as patients or get ill/old quicker if they do not treat their own body and mind healthily. We give them hints to look on their occupational life and environment around, and motivate decision makers to face these themes and 'abgo inside'ab thinking of their own health management.</p> <p>We cannot do it for them, they have to do it on their own, but we help them to face the stress and strain, resources and energy, work-life-balance and motivation - holding their life in their hands. So: our target is to break walls in their minds, because with 'time is money' and 'more patients in shorter time' they will resign and drop out of the system very quickly.</p> <p>Technically, we try to make it work for everybody, so, if possible, we will try not only a 'questionnaire' but also some visual more attractive style etc.</p>	<p>Learning is not an objective of the project. Learning only concerns tutors. The training will teach the tutors what their mission is, and a monitoring of the tutor in the firm will also take place (meetings between tutors will take place devoted to particular themes).</p>	<p>Our specific understanding of learning in our project: a person should have four items:</p> <p>"Personal responsibility, Ability to make decisions, fitting learning environment, cognitive challenge".</p> <p>How does it show?</p> <p>In our modules.</p> <p>How can you identify different understandings of learning?</p> <p>We notice f.ex., that some participants are able to set themselves goals and are able to reach them, other participants are not able to reach their goals (in the project setting).</p> <p>How can you "prevent" from learning?</p> <p>in our context learning the learning process is not as high as it could be, when there are more than 6 members in the working-group, when the meetings are not visited frequently, and when the participants don't come in a state to take responsibility of their own personal development process.</p> <p>How can you support learning?</p> <p>By taking care for the agreeable circumstances and individual learn-counselling and encounting environment.</p>

Italy	Poland	Slovakia
<p>Until the instant of this writing the knowledge of the learning process is in an experimental phase.</p>	<p>Learning in our project is understood in a relatively standard, traditional manner; the beneficiaries of the project are educated adults with definite job experience and usually, though not always, relatively well defined life and professional objectives, as well as established learning habits.</p> <p>The sole specific aspect is emphasis on self-defined and carried out projects, starting quite early in the process.</p> <p>There are multiple ways of “preventing” from learning. We try to avoid especially the situation, in which learned content is not put to some kind of test, at least reminding the real life conditions.</p> <p>One of the ways to support learning is to indicate the immediate interest and utility of the things learned (it is either interesting in itself, and thus enticing, or useful in the further path forward).</p>	<p>We do not work with learning, so we do not assume any specific understandings of learning.</p>

7. Learning environment

- Did you choose a special learning environment / arrangement for your project?
- Do you see any reason for varying or changing learning environments?

Austria	France	Germany
<p>Well, our Module with the online-test will make use of ICT and we want to make it in an easy and manageable style with not much duration. And with the systemic approach all projects bear responsibility for the understanding of the whole system and to bring the preventive view more and more into the minds and into the politicians' / managements' concepts.</p> <p>We see the conditions of work and the growing problems in Austria in the sector considered and all project partners are coming from social HR background and have sensitive intuition for the topics of the target group.</p>	<p>Learning concerns the tutors. The project defines training modules for tutors.</p> <p>Tutors will have mainly access to the modules by e-learning because they will be salaried of small businesses, so they will not have time for training outside of the firm, some meetings between tutors will occur on particular themes.</p>	<p>Our modules have the character of a special learning environment.</p> <p>There is no reason in changing the modules, but we have to modify them for the individual groups.</p>

Italy	Poland	Slovakia
Not provided.	<p>As indicated, our understanding and conditions of learning are relatively standard (with addition of e-learning or distant learning), so no special environment/arrangement was sought nor set up. All the choices made were aimed at the possibly effective learning process (number of people taught, equipment with computer facilities, provisions for non-residents, choice of in-house or e-learning course, selection of candidates to stages, etc.).</p> <p>One more remark: effectiveness is taken here to mean two-sided effectiveness, i.e. the final effect vs. the joint effort of the teaching and learning subjects.</p>	No, our project does not work with learning processes directly.

8. Life choice

- Have you an instrument for the right/best choice for the study target?
- How can you identify people's needs in the sense of study or skill improvement?

Austria	France	Germany
Not provided.	Not provided.	Not provided.
Italy	Poland	Slovakia
Not provided.	Not provided.	In the network of labour offices work the specialists for giving advice on improving skills through the offered courses. The skill improvement ought to increase a chance for job acquisition. We have identified a couple of problems decreasing the efficiency of finding a job by the trained people. The specialists mentioned are often psychologists or sociologists and do not exactly know the situation on the labour market, especially - what kind of occupation or specialisation is on demand. The second problem is low level of experience sharing. The expert system should solve both kinds of problems.

3.1.5. The glossary of basic notions

We will now provide a broader explanation to the set of basic notions, introduced in Section 3.1.1, and the respective structure for consideration of the processes, involved in realisation of the Lifelong Learning. This explanation should be regarded as a kind of attachment to the entire sub-chapter 3.1.

The method recommended to deploy the structure

Given that the need to learn is motivated by:

- *Social recognition.*
- *Vocational recognition (qualification).*
- *Social promotion.*
- *Vocational promotion, etc..*

A citizen, as an individual ready to choose, is able to work out strategies for acquiring knowledge by using the resources of all the formative environments:

the family, the city, the media, the company, the training organizations, the communities, the associative sector, etc.

These strategies are organized, according to the constraints of the moment, within the framework of a *project*, whether formalized or not.

Thus, the process of Lifelong Learning is built in the framework of a "project"

This Project :

- Includes several steps
 - A. Motivation / B. Vocational guidance / C. Path building / D. Training / E. Validation / F. Practical proof.
 - Concerns several actors
 - The individual (definitely, while the other actors listed are facultative).
 - Non-profit organisations.
 - Two sides of industry.
 - Training organisations.
-

- Companies.
 - Professional branches.
 - Employment offices.
 - State and communities.
- Concerns several categories of population, especially
 - the Jobless and the Salaried, classified, for the purpose of focussing the potential action, into: Disabled / Migrants / Women / Others.

Each step of the *project* approaches several topics:

A. Motivation

The will to be trained must be put as a background in the framework of a project, which is built little by little, based on four types of motivation:

- **Vocational** motivation: related to what the person thinks will improve employment prospects or increase the chances of promotion by learning new skills for the present position.
- **Academic** motivation: based on the desire of the person to increase knowledge and skills that will prepare for a future study.
- **Intrinsic** motivation: comes from within the person and is the strongest type of motivation. It includes personal goals, values, and interests. These are the things that get the person excited. In other words, the person has own personal reasons for aiming at success. A person intrinsically motivated will put more effort into the attempts, trying to find different ways to succeed and being more persistent.
- **Extrinsic** motivation: comes from outside. These are the things others want the person to do. The person is being motivated by others: family members, friends, or the employer. Extrinsic motivation consists of goals, values and interests of others as they affect the person.

Developing a *project* requires basing it mostly on intrinsic motivation (what do you want to do) instead of extrinsic motivation (what you feel you should do). These motivations develop according to (the no-

Developing a *project* requires basing it mostly on intrinsic motivation (what do you want to do) instead of extrinsic motivation (what you feel you should do). These motivations develop according to (the notions in brackets correspond to the short descriptions, which follow, and which are mainly focused on the potential actions, like those of respective projects):

- Information produced by the environment (*Information*).
- The way, in which it is recognised by environment (e.g. Fight against discrimination).
- Assistance that can be expected from the environment (e.g. *Social responsibility*).
- Opportunities that its environment can provide (Analysis of the job market).
- The project itself (*Life project and vocational project*).
- Behaviour of a citizen able to choose (*Learning to learn*).

I. Information

Information campaigns intended for certain social and economic categories:

Example: Information campaigns on:

The image of the trades which experience a shortage of workforce:

Discovered trades.

Actions carried out for and in companies to decrease the difficulties of recruitment.

Networks set up to inform of equal opportunity between women and men.

- Press campaigns.
- Forums.
- Access of women to the traditionally male trade:

Certain professions still remain male dominated. Women remain concentrated in definite fields, like teaching, secretarial work, administration, sale, or social and cultural action.

However, in the last years, working conditions have been improved, women have better access to technical training and especially to jobs with a shortage of workforce, due to the departures in retirement of the baby boomers. Industrial companies thus tend to integrate women into the traditionally male jobs.

II. Fight against discrimination

Actions carried out against discrimination in job environment or in insertion.

Examples: Regulation and measurements as to the recruitment of:

Women

Legislative Devices as regards fight against discrimination.

Social Assistance: Day nursery, domestic assistances, assistance to mobility.

Disabled people

Maintenance of the disabled in employment.

Installation of the working stations.

Devices of assistance to the recruitment of the disabled people.

Vocational guidance and accompaniment of the disabled people.

Immigrants

Insertion of the young people coming from the problem areas.

Secularity and discrimination.

Participation of the migrants to the social and political life.

Positive Discrimination.

Cultural differentiation.

III. Social responsibility

Intervention of companies in support of the access of the disadvantaged to Lifelong Learning:

- Participation in programs of elimination of illiteracy, of vocational training.
-

- Employment of disabled persons in a normal work environment.
- Giving grants to young people from deprived areas to enter university.

IV. Learning to learn

Learning to learn means:

- To evaluate with a critical eye the tasks of training given to oneself or given from the outside, and to determine the conditions enabling to make a success of these tasks.
- Starting from this evaluation, to define adequate goals of training.
- To know alternative strategies of training and to know how to use them, if necessary.
- To assess the quality of these strategies to achieve the goals set previously.

The three steps of "learning to learn" are:

Planning

What is the nature of the task?

What is my goal?

Which type of information and which strategies do I need?

How long and which resources do I have?

Monitoring

Do I have a good comprehension of what I am doing?

Does my task have a sense for me?

Am I achieving the goals that I fixed to myself?

Do I have to change of strategy?

Evaluation

Did I achieve the goals that I fixed to myself?

What works? What fails?

What will I make differently the next time?

Example: A pupil carrying out an activity (e.g., writing). S/he will have to be able to plan and monitor it (control enables the influence on performances in writing, monitoring enables to evaluate directly the quality of writing), then to evaluate it once carried out.

V. Analysis of the job market

Carried out most of the time within the framework of observatories, the analysis of the labour market aims at publishing statistical studies and syntheses on the employment and labour market for identification and anticipation of competence and qualification needs:

- *About trades*
Analyses of the principal trades (offer and unemployment) by professional families.
- *About publics*
Analyses of specific publics of applicants for jobs: young people, women, disabled people, etc.
- *About watching of the labour market*
Synthesis and selection of bibliographic records of the most relevant texts on a given subject or reports of organized conferences gathering companies, professionals of employment, researchers and experts.
- *About employment and activities*
Analyses of various main topics of the labour market: difficulties of recruitment, anticipations of the companies, tensions and readjustments, etc.

VI. Life project

The life project, essential precondition to the vocational project is built in four steps and aims at apprehending the individual as a whole (psychological, social, medical, vocational). It involves:

- Definition of the values involved.
 - Projecting into the future.
 - Listing the attractive fields.
 - Defining the personal constraints (what I am and what I am able to do).
-

Project definition requires (some) freedom of choice and (some) liberty of action.

Examples of the nature of constraints to be taken into account: Mobility / Adaptability / Health.

B. Vocational guidance

Vocational guidance is the process of helping a person to develop and accept an integrated and adequate picture of himself and of his role in the world of work. It has a specific goal, to assist individuals in finding satisfying, interesting and realistic roles in the environment.

Vocational guidance is the process of helping individuals to know themselves; their interests and abilities and the world of work and its needs to be able to reach a mature career decision.

Vocational guidance refers to the services assisting individuals of any age and at any point of their lives to make educational, training and occupational choices and manage their careers.

It includes services provided to those who have not entered the labour force, services to job seekers and services to those who are employed. It includes a wide range of activities like:

- Activities within schools to help students clarify career goals, understand the world of work and develop career management skills.
- Individual and group guidance to assist decisions about initial courses of vocational training, further education and training, initial job choice, job change or work force re-entry.
- The organized and systematic use of community members such as employers to provide occupational and educational advice and information.
- Printed, computer-based or on-line information about jobs, careers and vocational training to help individuals make career decisions.

Vocational guidance services are important both to education systems and to the labour market, as well as to their interface. In the education systems, career education has an important role to play in compulsory education by laying the foundation for lifelong career development,

including knowledge competences regarding self awareness, the world of work and making decisions and transitions. Within labour market vocational guidance services can:

- Improve accuracy and accessibility of the information available to individuals about short and long term job opportunities. In turn, this can improve individual decision making about jobs and about job training opportunities and improve the allocation of human talents within the labour market. In particular, vocational guidance can help achieving a better match between interests, skills and qualifications on the one hand and available job opportunities on the other hand.
- Help to improve the allocation of labour across regions, industries and occupations in the face of labour supply and demand fluctuations.
- Make a difference between the successful and unsuccessful implementation of active labour market programs and active welfare to work programs.

Vocational Guidance should provide answers to different problems, related to the following phenomena and issues:

- The world of work being in a state of continuous change.
- The disappearance of some careers and the emergence of new or alternative careers.
- Employers needing to recruit individuals capable of showing their skills and abilities.
- Matching the changing values of individuals with new set of career possibilities.
- Assessing the needs of the labour market and matching them with the needs of the individuals.
- Avoiding unemployment.

Process of Vocational Guidance: Vocational Guidance helps individuals to acquire knowledge in the following areas:

- **Self-awareness** relates to the process of gathering information about the interests, abilities and values. It helps one to answer such questions as:
-

What kind of person am I?
What type of work do I enjoy doing?
What are my interests and abilities?
What kind of skills do I possess?
How can I take a decision regarding my future career?
How can I know myself?

Take self-interest inventories that help you to know better your interests, values and skills:

Considering your academic background and other achievements what school subjects were you good at and what subjects were difficult for you?

Have a look at how you spend your leisure time.

Identify the skills that you are highly motivated to use.

Write something about yourself and identify the theme that points out who you are.

Write your personal objectives and identify who you want to be and what you want to achieve in your life.

· **Exploration of the world of work:** involves gathering information about the different careers that might fit your interests, values and abilities. It helps you to find answers to the following questions:

What kind of education or training is required for each kind of career?

What are the arguments for and against each job you think of?

What are the working conditions in the different types of careers?

What does a certain career look like?

What are the job requirements?

What is the financial output?

To be able to answer such questions:

- Know more about these careers.

- Meet people who work in these careers and ask them questions like the following:

What are your responsibilities in a typical working day?

Did you work in other jobs?

.....

What is the required background (education, training, experience)?
What do you like and dislike in your work?
What are the skills and the abilities required in your job?
What are the future trends that you see for this type of job?
What is the organizational structure within your institution?
How does your department fit within this structure?
What is your advice to someone who is looking for a training in this field?

· **Mature decision making:** is the process of exploring the different alternatives, narrowing down the possibilities and then choosing the right alternative to ensure a mature career decision by doing the following:

- Looking at the different possibilities and asking yourself whether there could be other ways that could help you solving this problem?
- Thinking of your decision: can you take it in another way?
- Listening to others.
- Weighing the advantages and disadvantages for the different alternatives when you narrow down your choices?

· **Integration:** Process, which leads a person to finding a place recognised in the society. Integration can take several aspects: *social, vocational, total.*

Social integration

Social integration relates to the social accompaniment of the person. The social accompaniment is a contractual relation of integration between a specialized agent and a user of a service of social action. The situations which can request an accompaniment are multiple: handicap, running into debt, accession to or keeping in a housing. The act to understand and make it comprehensible requires relations of proximity, a "jointly lived moment". It requires a formalized or implicit agreement between the accompanied person and the counsellor.

Vocational integration

Vocational integration means getting in touch with the work environment again or the readjustment at the labour market.

Total integration

Total social integration indicates the whole of actions of a personalised accompaniment aiming at a total effect of cross interventions (employment, care, housing, culture, education).

· **Guidance talks and counselling (ICT):** There are many methods to carry out vocational guidance talks, calling more and more upon data-processing tools for vocational positioning (job testing). This talks can be carried out face to face or remotely.

· **Trade and employment:**

Trade is the subject of an institutional description validated by the professionals, the state, the two sides of industry. This reference frame of trades lists the activities carried out within the framework of the trade and their current conditions of exercise. It defines also the level and competences necessary for the implementation of these activities.

Employment (job) is defined by the employer in the framework of recruitment. An employment (job) covers a whole or a part of one or more activities of one or more trades.

· **Vocational project:** It is a section of the life project, supposed to bring satisfaction of the needs (in a broad sense) in and by the life of a worker. It is necessarily in agreement with all the factors determining the life project but, being related to the real world, it requires taking into account the external factors (labour market, training level, age, etc). It must:

- Be a realistic consideration of the constraints and opportunities of the market.
- Be realisable and reachable by suitable actions on the basis of individual potential and competences.

Life project and vocational project remain the? field of imagination? The career, which starts from the training or the studies, which will lead to it and which is continued in the trade with the vocational learning to progress, remains the? field of the action?

C. Path building

Following the development of the socio-vocational assessment, decision was made to follow a training. It is then necessary:

- To identify competences necessary to the implement the vocational project (reference frame trade).
 - To make an evaluation of the already acquired competences which are useful for the vocational project.
-

- To diagnose the requirements by locating necessary competences which are to be even consolidated to acquire.
- To have advice and information on the various trainings suggested.
- To build training path answering to the expectations and the situation.

The required training can be:

- A basic training.
- A pre-training.
- A not qualifying training.
- A training leading to a qualification.

The training path will be different from a person to another according to her situation and her project. The first essential step consists in collecting advice and information to work out the best adapted training path.

· Capacity, vocational competence

Competence includes

- Cognitive competence involving the use of theory and concepts, as well as informal tacit knowledge gained by the experience.
- Functional competence (skills or know-how), those things that persons should be able to do when they are working in a given area of work, learning or social activity.
- Personal competence involving knowing how to conduct oneself in a specific situation.
- Ethical competence involving the possession of certain personal and vocational values.

Capacity

Set of bents and assets noted for a person, generally formulated by the expression "being able to...". A capacity represents a possibility of success and implementation of

competence in the achievement of an activity. It can be noted directly in a vocational or training context or indirectly by the means of tests.

Vocational competence

Implementation, in vocational situation, of capacities making it possible to carry on an activity suitably.

· Learning and Learning outcomes

- Learning

Cumulative process, whereby individuals assimilate increasingly complex and abstract entities (concepts, categories and types of behaviour or models) and/or acquire skills and wider competences. This process takes place informally, for example through leisure activities, and in formal learning settings, including the workplace.

- Learning outcomes

Statements of what a learner is expected to know, understand and/or be able to do, or is able to demonstrate, after completion of any learning process or at the end of a period of learning.

· Vocational positioning and training project

Makes it possible to define a personalised training path adapted to the capacities, competences and vocational interests of the person. It includes:

- Checking of the requirements for an admission in a training allowing the person to have landmarks with regard to:
 - The needs and expectations.
 - The prerequisites required to enter in training.
 - The principal constraints of the trade and employment.
 - The offers of training.
-

- Evaluation of the aptitudes of the person to make a success of her training relating to:
 - Capacities of training relating to an identified training scheme.
 - Capacity to integrate and to transfer the trainings considered in a context of work.
 - Capacity to be accepted and to imply oneself in a statute of trainee (identity process, relation with the trainer, life of group, respect of the schedules and procedure rules, etc.).
 - Capacity to mobilize ones resources and to be centred on a learning outcome.
 - The level of adaptability towards the constraints related to the training situation (family distance, physical and intellectual availability to mobilise over time).
 - [The above requires instruments of diagnosis (tests, psychological talk, etc.)].

 - Checking of the aptitudes of the recipient to occupy employment after the training:
 - Work on the representations of the situations of employment.
 - Adequacy with the profile of the employment:
 - Requirements constituting the prerequisites of the entry into learning.
 - Required competences of the employment acquired during the training.
 - Required competences acquired during the exercise of employment.

 - Identification of the factors supporting or disadvantaging the success of the training.

 - Building of the optimal training path starting from an evaluation aiming to:
 - Clarify the expectations and objectives of the person.
 - Apprehend the person's style of training.
-

- Work out the adapted pedagogical answer according to the training outcomes.

This requires:

- Positioning the person with regard of the training outcomes and competences which he/she does have already have.
 - Identify, in a selective way, an individual path most fit to allow achieving his/her goals.
- Defining the methods of the vocational guidance of the person during the training:
 - Psychopedagogical assessment aiming at a description of the furtherance of the training path, then to adjust it according to the evolution of the needs of the person.
 - Accompaniment of the path, facilitating for the person the determination and the evaluation of the training steps.
 - Individual support to help the person to clarify and overcome her training difficulties.

· Securing of the vocational path

Today, the accomplishment of "careers" is not linear any more? The place taken by mobility in the vocational life requires the construction of new safety measures in and out of the working relationship?

The adaptation to the changes requires not considering any more the competence as acquired once for all, but registered in a permanent course of evolution. The individuals must become actors of the development of their competences in individualized trajectories of personal evolution, mobilizing new resources and guarantees on the other hand balanced by the risk taken by the person.

The development of the employability of public furthest away from employment also requires the implementation of systems of accompaniment combining actions of mobilization, vocational guidance, training, setting in situation of work, within the framework of individualized courses of insertion and qualification.

· Securing the training path

The rates of giving up the training path can be very significant and are conditional upon:

- Repercussions of the project of training over the life project.
- Motivation and autonomy of the target public.
- Quality of the diagnosis of the needs carried out upstream for the training activity.
- Good definition of the objectives to reach.
- Teaching organization installation.
- Adequacy of the formative resources placed at the disposal.
- Quality of the psycho-pedagogic accompaniment throughout the path.
- Allocated financial support, etc...

The parameters contributing to the success of the learning path are numerous, each one being able to be the subject of strategies diversified to control them.

Example: Installation of a training with an individualized teaching organization and a permanent leaving option.

D. Training

· Objectives and pedagogy

Training Objectives

Competences to acquire, to improve or maintain, expressed by the specifications of the training. They are used to evaluate the effects of the training. The objective of a training activity is a precise goal that it proposes to reach, aiming at an evolution of the skills and know-how of the people starting from their competences, qualifications and needs.

Teaching Objective

Capacities that the trainee must have acquired at the end of a training activity, defined by the trainer, starting from an objective of training. It is used to build and lead the training activity, and to evaluate the acquired capacities.

Pedagogy

Set of methods, techniques and procedures, which characterise either the teaching of a discipline, or an activity to bring up the trainee.

· Teaching engineering

The reference frame of training gathers the whole of the training and the teaching objectives relating to a vocational field. It is based on the reference frame of the trade and includes vocational contents, behaviours, and know-how, which can be objects of training.

For each level of the reference frame (i.e. training, unit, sequence, see below) descriptive cards are elaborated, in which the trainer finds all information necessary to organise, prepare, lead and evaluate his action.

Thus, *training (formation)* is defined by the ultimate goal of learning and the course associated. The objective is to secure skills and knowledge sufficient for effective execution of a job or a profession.

Training is composed of *units* or *modules*, which are defined on the basis of didactic, substantial and organisational prerequisites (a definite component of skill, a time frame etc.).

Finally, a unit, or a module, is composed of one or more training *sequences*, defined with respect to a concrete competence.

The reference frame of training constitutes a data bank, from which could be built, from the point of view of the trainee, all the possible and relevant paths of training (standard or specific). For this purpose the data bank system:

- Selects the activities of the reference frame of the trade, which will be treated in the training; by analysing the contents of vocational competences precisely, it locates the capacities concerned and retains only those which can become the object of training.
 - Determines the parameters of the training situation proposing, for example, the vocational settings in a situation, which makes it possible to place the objectives of training in the
-

actual vocational context (apprenticeship, job execution).

- Is used as a basis for vocational positioning since it identifies the objectives of training, which could be evaluated with an aim of working out in detail the adapted path.
- Consists of three kinds of descriptive cards:
 - Cards describing the training:
 - The targeted trade and its context of realisation.
 - Objectives of training of each unit which composes it.
 - Cards describing each module aiming each one at the control of a professional activity:
 - The targeted activity accompaniment and its context of realisation.
 - Objectives of training of each sequence.
 - Cards describing each sequence aiming each one at control of a definite competence, i.e. the capacity of resolving problems in the work context:
 - Targeted competence and its context of realisation.
 - Teaching objectives (capacities to be acquired).
 - The expected vocational behaviour.
 - The list of the teaching resources.
 - The description of the evaluation to be implemented.
 - Its progress.

· Learning system

Teaching organisation

- Training during work:

Training in company integrating a dimension of counselling. Its principle is based on a simultaneous action on the development of competences and the evolution of organizations. The situations approached can relate to the evolution of jobs in a company, development of autonomy of the operators, total responsibility of team manager, accompaniment of a quality approach, etc.

- Internal training:

In-house training, for which the company uses its own teaching means, preserving the direct control of its teaching organisation and its material progress.

- Open training:

Training of which a part, sometimes contractual, is carried out of the training centre. It is generally characterised by a freedom of access to the teaching resources placed at the disposal of the trainee, "open" meaning without any restriction (absence of admission requirements, training path chosen by the trainee according to its availability and its learning pace, conclusion of a contract between the trainee and the training centre).

- Remote training:

System of training conceived to allow people to be trained without moving to a place of training and without the physical presence of the trainer. Phases of regrouping of the trainees in the training centre can be associated.

- Alternate training:

Succession of periods of training organised between the training centre and company. The presence of a Tutor is then recommended at the workplace.

- Standard training:

Training activity reproduced in accordance with a pre-established model. It does not take into account the possible diversity of the assets of the trainees.

- Individualisation of training:

Mode of organisation of training aiming at the implementation of a personalised step of training. It places at the disposal of the trainee the whole of the resources and the teaching means necessary for the training path and the situations of training. It takes into account trainee's assets, objectives and training pace.

- Individualisation of the situations of training:
Initiatives taken by a trainer or a training centre to respect and develop the strategies and the individual paces of training.
- Self training:
Pedagogical system allowing a person to be trained alone, at an own pace, by using adapted teaching resources. The accompanied self training combines the means of self training and the specific interventions of a trainer.

Teaching method

A definite ordering of the steps, formalised and applied according to defined principles to acquire a whole of skills in conformity with the pedagogical objectives. The teaching methods are differentiated according to the objectives, the contents and publics and can be presented in the form of typologies. For example:

- Masterly methods.
- Interrogative methods.
- Active methods.

· Teaching resources and base of skills

Inventory of the diversified teaching means at disposal of the trainee either in free access or with the assistance of a trainer. Placed at the heart of a teaching system, it is a help for self training.

· Evaluation

Checking of the degree of attainment of the teaching objectives. The checking confirms that the expected new capacities were actually acquired by the trainee at the end of the sequence or the action of formation. The following typology can be proposed:

- *Forecast evaluation*: it establishes, starting from standardised tests, an estimate of the chances of success of the person in a later performance.
 - *Diagnostic evaluation*: Carried out before the training or a
-

sequence of training, it produce information making it possible to adjust the training with the profile of the trainee.

- *Formative evaluation*: It allows the trainee, at the end of a phase of training, to locate own progress, to identify own strong points, but also to understand own difficulties and to find solutions to cure it. The trainer contributes to this comprehension and, possibly, proposes the necessary solutions.
- *Measured evaluation*: its purpose is to sanction (positively or negatively) an activity of training in order to use this result for a classification, a selection, a certification or a validation. This result can be compared with that of the group or with a criterion.

· Tools of training and monitoring (ICT)

Approaches to in-house training depend on the size of the organisation. Big organisations have systematical training and learning programmes, including ICT classes, while smaller organisations rely on graduates taking the initiative and responsibility for their own training and learning.

e-Learning has not yet made a breakthrough in the workplace in general, but bigger organisations are investigating the usefulness of e-learning in in-house training. Some are already implementing e-learning.

Persons, who have acquired e-learning skills before have, therefore, an edge in these workplaces. The role of the Internet, and of intranets, is growing in professional work. Weaknesses in information searching strategies among employees and new recruits will in the future be a disadvantage as more and more material, such as training manuals, is moved online.

The learning platforms suggested on the market are numerous. They allow to:

- Structure the contents of training.
 - Build units and sequences of training.
 - Access the teaching resources.
-

- Position the trainee and build a training path for him/her.
- Evaluate the objectives to reach.
- Follow the advance of the trainee on the training path.

· Vocational Tutor

Each trainee must be followed by a Tutor. The tutor is a professional expert, who makes a link between the training context and the company context. He must be sensitive to the pedagogical and vocational accompaniment techniques to receive trainees in his company.

E. Validation

· Formal, non-formal and informal learning

The EC (2001) Communication on Lifelong Learning: formal, non-formal and informal learning.

Formal learning: learning typically provided by an educational or training institution, structured (in terms of learning objectives, learning time or learning support) and leading to certification. Formal learning is intentional from the learner's perspective.

Non-formal learning: learning that is not provided by an educational or training institution and typically does not lead to a certification. It is, however, structured (in terms of learning objectives, learning time or learning support). Non-formal learning is intentional from the learner's perspective.

Informal learning: learning resulting from daily life activities related to work, family or leisure. It is not structured (in terms of learning objectives, learning time or learning support) and typically does not lead to certification. Informal learning may be intentional but in most cases it is non-intentional (or "incidental"/random).

· Qualification and levels

Qualifications

Qualifications are a formal expression of knowledge, skills and wider

competences of the individuals. They are recognised at local, national or sectoral level and, in certain cases, at international level.

A qualification is achieved when a competent body determines that an individual's learning has reached a specified standard of knowledge, skills and wider competences. The standard of learning outcomes is confirmed by means of an assessment process or the successful completion of a course of study. Learning and assessment for a qualification can take place through a programme of study and/or work place experience and/or any type of formal, non formal or informal learning pathway. A qualification confers official recognition of value in the labour market and in further education and training. A qualification can be a legal entitlement to practice a trade.

Level

Example: NVQ levels.

There are five levels in NVQs covering standard to complex working roles. The following definitions of NVQ levels provide a general guide.

- Level 1

Competence involving application of knowledge and skills in the performance of a wide range of varied work activities, most of which may be routine and predictable.

- Level 2

Competence involving application of knowledge and skills in a significant range of varied work activities, performed in a variety of contexts. Some of the activities are complex or non-routine, and there is some individual responsibility or autonomy. Collaboration with others, perhaps through membership of a work group or team, may often be a requirement.

- Level 3

Competence involving application of knowledge and skills in a broad range of varied work activities performed in a variety of contexts, most of which are complex and non-routine. There is considerable responsibility and autonomy, and control or guidance of others is often required.

- Level 4

Competence involving application of knowledge and skills in a broad range of complex, technical or vocational work activities performed

in a wide variety of contexts and with a substantial degree of personal responsibility and autonomy. Responsibility for the work of others and the allocation of resources is often present.

- *Level 5*

Competence involving application of skills and a significant range of fundamental principles across a wide and often unpredictable variety of contexts. Very substantial personal autonomy and often significant responsibility for the work of others and for the allocation of substantial resources feature strongly, as do personal accountability for analysis and diagnosis, design and planning, execution and evaluation.

· Method of validation

Assets

Together skills and know-how whose person expresses the control in an occupation professional, social or of training. The assets required to follow a training constitute the prerequisites.

Certificate

Written document, recognizing to the holder a certain level of capacity checked by a control. The certificate can be issued only by one dispenser of training.

Diploma

Written document establishing a preference or a right. Emanating from a proper authority, the diploma has a legal dimension. It conditions the access to certain professions and certain trainings or contest.

Reference frame of trade

- The basic documents for the Qualification Award System are Vocational Standards (Reference frame of trade).
- Vocational Standard is a document that sets out the requirements to knowledge, skills, proficiency, experience, values and personal qualities on a specific vocational qualification level.
- Vocational Standards set up vocational qualification (knowledge, skills, experience); social qualification (communication skills) and personal qualification (personal qualities).

Example of the method or procedure:

.....

- On the basis of vocational standards of the trade, determination of the vocational competences and their level, for example, for each trade:
 - A vocational training level is defined.
 - The contents and the working conditions of all the activities that compose it are described.
 - All the competences used in each activity are listed.
- Determination of criteria, order and conditions of certification
A reference frame of certification defines the criteria that must be respected to obtain the qualification.
- Conformation of vocational assets and vocational requirements
It can be determined by a jury made up of the professionals of the trade helped by a "frame of observation", a guide set up to help the jury. This jury observes the applicant in the exercise of the activities of the trade. It decides, on the basis of the criteria of the reference frame of certification, to award or not the qualification to the applicant.

· Social and Vocational recognition

The vocational qualification is at the same time a significant component of the social recognition (to be recognised as a skilled citizen) and an additional guarantee to find an employment (to be recognised as a professional). The vocational experience makes it possible to acquire the competences recognised in the company where they were acquired. The qualification allows that these competences are recognised by the professional family to which belongs the exercised trade. These competences, once institutionally recognised can be transferred in other companies and even in other trades from same or another professional family.

This vocational recognition allow to envisage the possibility of career evolution.

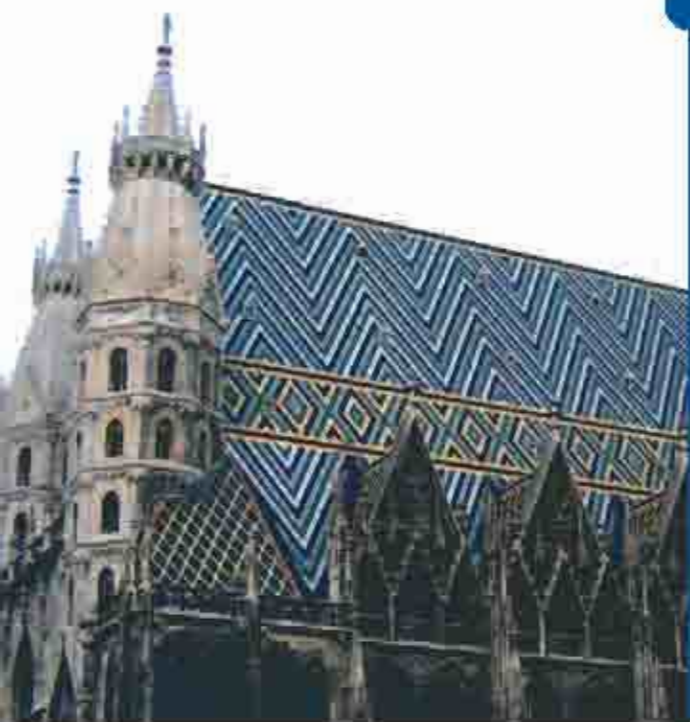
3.2. The actual experience

The short accounts here presented, again formulated from the

standpoint of individual national partnerships and projects, highlight *general experience, obstacles, missing links* and *success factors* with respect to selected keywords, as considered in the preceding section, or with respect to the specific project in general. We treat this as a contribution to identification of critical factors, resulting on the one hand from the previous considerations and on the other – from the actual experience of the projects and the Working Group participants.

For a reference concerning the shorthand description of the respective projects, a Reader is referred to Attachment 2 to this report.

**The project "Gesundes
Gesundheitswesen"
("Healthy Health Care
System")
Austria**



3.2.1. Austria: the Project “Gesundes Gesundheitswesen“ (“Healthy Health Care System“)

(Intrinsic) motivation

Experience

In our opinion *Intrinsic motivation* is the most important part for any learning input, whether with respect to individuals for themselves or the decision makers. Our target group is the staff in hospitals themselves and, of course not only the ‘plain’ employees alone, but also the managers, who need adequate motivation to do anything! We want to encourage the employees in that branch to engage in the Lifelong Learning. This involves demonstrating that the respective goals, set for the Lifelong Learning are not far away. Thus, the Health Care system can be medicated itself by teaching them in an innovative way to ‘re-like’ their job and to effectively motivate themselves (and the system behind them, all the health care institutions and organisations and the managers in this branch), in order to stay capable and employable to do that specific and difficult job with adequate engagement.

Obstacles

In our two projects of Module 2 (HILL International) and Module 3 (KDZ) the target group are the nurses: Module 3 has created a new curriculum, according to which nurses will learn the coaching methods and the counselling techniques to advise their colleagues directly when they have problems, difficult situations or patients etc. Module 2 is developing a new online test, which shall give the participants feedback about their occupational situation and the coping mechanism, and shall help them within their career planning and performance management. It should also help the HR departments to improve their performance. It was not easy to find participants for these two projects.

The same problems occurred in Module 4 (of Human Health Design): they have convinced fifteen hospitals to take part in some systemic and interdisciplinary workgroups, concerning their daily business and the systematic exchange on their work. But: employees only take part in the activities when they have time or are interested in the special topic, and most of the time the participants are only nurses and therapists, but no doctors participate! And Module 1 (of the Institute of Humanistic Management) gives opportunities to HR managers to have exchange by taking part in some lectures, with a newsletter, and all find the idea good, but not much time to come to the lectures (not so many participants

as in the beginning). The very same lack of time seems to be the obstacle for the intentions of Module 5 (of the AMZ), where our project partners do a project on workplace health promotion in one big Viennese hospital; the employees can take part there in whatever they want or have time and interest as well. To find, in the present situation of increase of emphasis on profit orientation and increased competition as well as increasing patient numbers, a hospital which would want to supply Human Resources for the whole duration of the project was a big obstacle in the beginning (one already fixed hospital suddenly said NO and the target group disappeared overnight!).

Of course, free choice and the given permission of the management and commitment of the respective institutions are a necessary basis for the motivation for participation. But all our services of the DP are without extra fee – so, everybody of the target group must show their own motivation because if not – nobody will come and join the projects.

Missing links

Lack of time and resources are always a problem! Even those employees, who were convinced about the benefits and who have shown high interest in the services, had to participate in the program on the top of their 'normal tasks' (even when they can/could join our projects during their working time). Reaching the target group worked better when individual networking and personnel-oriented conversations and permanent acquisition was done. This is like in classical salesmanship: if you know how to sell the services and if we could show them the benefit of the contents, then it worked. So, the missing link is/was of course when a project partner has/had no good settled partnership with organisations in the Health Care System. Without promotion and networking on individual and personnel level all project partners would not succeed.

Success factors

Networking, personnel energy and own motivation, convincing sales of our projects and many calls and meetings with the target group (and word-of-mouth-advertising).

For all target groups it is important that they have options, autonomy, good team atmosphere and internal climate, good relations to others, stable personality and energy to follow their goals.

Individual awareness versus social responsibility for vocational training/learning

Experience

Awareness corresponds to the factor of motivation: Individuals must have the motivation to learn additional topics and contents. They know about this, but the lack of resources is the most interfering factor in the implementation of Lifelong Learning and vocational trainings. An aim of the project is to convince individuals in the health care system to take care of their own health (care for yourself - care for the others).

On the other hand, some hospitals and project partner of the Austrian DP have realised that 'developing the personal development' is a key factor for satisfied employees and a better profit in the end.

Obstacles

It is mainly nurses that shall invest their time and interest into our DP topics: most of them are highly motivated for their job and some already have (more like the EQUAL target group) physical and psychical strains and are more or less aware of the need to join the projects. The high turnover and work overload at their work places rob them of the time needed to work constantly with us. Also with respect to management, and mainly within the platform for HR managers of Module 1, we try reach the 'multiple' decision-makers, members of other health service professional groups (therapists, HR managers, doctors, governance etc.)and bring them into our target group as well (in terms of a wider understanding and in some project parts directly). This is, as well, associated with the necessity of changing the orientation of the managing personnel (see the *Obstacles* before) in the health care system towards economic sustainability.

Missing links

A missing link (or element) is the constant political environment and the structures, which would not be so much disturbed by the changes within the systems and a new political situation (e.g. Lower Austria: founding a new health care holding, so that all decision makers have not been sure what they are allowed to decide and which budget they have etc.).

Some of us are more, and some are less involved in this merry-go-round,

but within project duration of two years it meant less time to build up new strategies together.

Further, some institutions have knowledge about the global Corporate Social Responsibility approach. Those organisations in the Health Care System, who have started to deal with this management concept, were more likely to get convinced to join our DP than the other ones (it did not depend whether they are private or public etc.). The missing link is therefore constituted by the lack of CSR-oriented awareness in some of the entities involved, especially with respect to the responsibility towards the health status of their own employees.

Success factors

All of them understand the Win-win-situation that we have created within the DP projects: Vocational training and new inputs for free! In the beginning of the course we have tried to find commitment for topics that all of them are interested in and on which all of them could focus. Also our systemic view and involving the knowledge concerning the political reforms in Austria helped us a lot.

Formal and non-formal learning / understanding of learning

Experience

In our view social competences are valued higher today than in the former times (matching the distinction into the old and new economy sectors).

For example, when recruiting new employees, the CV remains very important, but it represents for the most formal learning. Vocational experience, e.g. from working abroad, is very relevant because it means that the candidate acquired also non formal learning.

An individual is not always aware of his acquisitions, an accompaniment is needed to allow him to be aware of his acquired knowledge.

The individuals targeted in the Austrian project by the formal learning aspect are managers, employees, maybe in some cases the unemployed people (who have lost their jobs because of de-motivation, physical or psychological strains).

The aim at a formal level is related to telling them they must make personal development.

One view on the 'understanding of learning' in our projects is that we address the EQUAL approach of 'empowerment', meaning, in practice, that the individuals working in the field of health care have to learn that the preventive approach is important and that they will end as patients or get ill/worn out as well – and more quick if they do not treat their own body and mind in a good and healthy way. We try to give them hints from an external perspective on how to look on their own (occupational) life and the surrounding and circumstances around them. And, secondly, to motivate the decision makers to face these themes and to 'go inside' in thinking of their own health management.

Obstacles

Of course we can not do this for them – they have to do it for themselves on their own! But we try to help them in facing their stresses and strains, their resources and energy, their work-life-balance and motivation... - in holding their own life in their hands. So: our target is to break walls down in their minds, because due to 'time is money' and 'more patients in shorter time' they will resign and drop out of the system very quickly.

- a. The formal learning objective one is: that the managers and heads in the health care system should understand that they must make personnel development; to support them in seeing that their own staff must pay attention to their own health as well and that professional career planning and performance management can be a strategy against burn-out, high fluctuation, sick nurses and unmotivated and unsatisfied employees. In addition, we try to encourage them to take responsibility for their staff (human capital).
- b. The informal learning objective is: that the individuals see that new tool and the systemic view on the Austrian health care system must find a solution and that they must take their occupational future in their own hands, as well, and to encourage them to take some time for reflecting their own situation, resources, stresses and strains.

These two ways of learning are most of the time combined in the possibly best way so as to attain the Lifelong Learning goals! All our projects have the common target of ensuring the workability of employees in the health care system with teaching them innovative tools or skills. Those who are interested and work together with our ideas will get advantage out of it.

Missing links

It is necessary for the acceptance of informal learned competences to have social and vocational recognition. For this, it is important that participants in our DP realise that the way to reach the goal is not far away, if they attach a real value to it. Of course, lack of motivation and resources (time, money, work-life-balance, family support, leadership etc) will remain an obstacle to have people make use of Lifelong Learning.

On the management's side there exists no accepted 'accounting settlement system' for informal learning. The society has seen that social competences, such as, e.g., conflict management skills, learned in family-life is a worthy competence. In Austria they often discuss the gap between the shortage of nurses in the residential care for the elderly patients and the illegal nurses coming to do that job from the neighbouring countries (Czechia, Slovakia, Poland etc.). But to find a salary system for all nurses is a political undertaking with no guarantee for success.

Success factors

Concerning the techniques we are using for the Lifelong Learning in our projects, we have to consider, e.g., the aid of ICT (= much easier, saving time = in an easy and manageable style, with not much duration, 'time is money'), which is suitable to bringing participants into the 'learning position'. The second paradigm is the systemic approach: all projects bear responsibility for the understanding of the whole system and for bringing the preventive perspective increasingly into the minds and politicians' / managers' concepts. Acting as a kind of external 'consultants' we see the conditions of work and the growing problems in Austria in the sector considered, and all the project partners, coming from the social HR background, have sensitive intuition for the topics of the target group, as well as basic know how in the field of health care. The focus on interdisciplinary management is a success factor also, because everybody has different learning conditions and possibilities.

So, the idea that we want to demonstrate additionally is the "learning by doing" method. Informal learning does not bring by itself a higher salary or other remuneration, but it brings people a more satisfied surrounding and occupational quality.

A further success factor always is: to bring all decision makers to one table! The side of the employees and the side of the employers must a-

gree to the participation and to the projects. Even if in the organisations themselves different views are not easy to handle, with external help and involvement in the cooperation we could convince the participants that there is a profit in the long run for all.

The ZIP.Euroskill project Germany



3.2.2. Germany: the ZIP.Euroskill Project

Participation in the project is a part of an internal staff development, which leads to the qualification of a “EuroSkill” advisor. The participants obtain thereby the competence to accompany trainees in the preparation, execution and the wrap-up phases of the times abroad. In this way the quality of the intercultural learning process is guaranteed.

The experience from the project, concerning selected keywords is as follows:

Personal responsibility

Personal responsibility is an important aspect in the company. Hence, autonomous behaviour is put forward in the respective area of responsibility. The management structure is not hierarchical, but matrix-like. Further educational needs are established through an appraisal interview, but, on the other hand, the employee decides by her/himself about the further education that is of importance for her/his future career.

Experience

Participants decide themselves whether they want to participate in the internal staff development project. Since this human resources (HR) development project falls internally under the category of “ordered”, the regular budget for further education is not used for it. From the beginning participants are highly motivated. Furthermore, they want to dedicate themselves to the future international projects.

Obstacles

Due to the European policy (no double financing) the training can only be offered to a certain number of the employees and the additional time expenditure spent on this project has to be integrated into the daily work routine.

Missing links

The HR development project demands a high level of time investment. As a result the employment in the area of international projects within the organisation requires more time.

Success factors

Participants can select a HR type that corresponds with their individual further education needs. At the same time the development of their competences are beneficial for the organisation. It is an attractive offer for the employee to obtain a “service in return” for their additional efforts.

Formal / informal learning

Experience

The HR project made it possible to study in both formal and informal contexts. On the one hand, the contents were conveyed (formally) during individual modules. The students had the opportunity to study by themselves and in groups. Therefore the process of learning was optimised.

Obstacles

If the acquired knowledge is not used in the day-to-day work, the learning process might be slowed down.

Missing links

In the formal study phases it does not always happen that the transfer to practice is sufficiently effective.

Success factors

The combination of formal and informal learning enhances the equality of the learning process. The participants bring greater motivation into their day-to-day work. Reflection of the local cultural specificity of one's own and sensitisation for other cultural dimensions and standards helps the advisors to better support the target group and is perceived as a resource and at the same time a challenge.

Target orientation in small steps

Experience

Besides having the general aim of the HR project, each of the small goals was adapted to the needs of the participants. They were dedicated during the learning process, because the aims were adapted to their work routine.

Obstacles

Not all of the individual aims could be taken into account.

Missing links

It will take time to implement the needed changes and the formulation of the aims in small steps requires patience and persistence in order to attain bigger changes. This presents a challenge that must be integrated into the daily work.

Success factors

The consideration of the aims, which were formulated by the group of participants, led to a high level of acceptance, a good and constructive working atmosphere, and motivated to go ahead with the learning process.

Process orientation

The methodical didactic procedure and the formulation of aims for the respective modules of the HR project were always adapted to the learning process of the group.

Experience

The participants felt being taken seriously and showed high flexibility, including the capacity of abandon the originally agreed contents and to move into different directions (without losing sight of the initially agreed aims).

Obstacles

The time schedule planned originally could not be kept, which was interpreted by some of the participants as lack of time management.

Missing links

Until now not much time has been given to the process orientation in the work routine of the participants.

Success factors

The participants felt like experts, who are capable of shaping the learning process. Due to this the HR project gained additional quality in terms of

contents and dynamics. From this added value the concept arose as to how to convert the process oriented learning in the daily work with young people.

The participants considered the possibility of converting the process-oriented study into a weekday frame of work with teenagers.

Win-win situation

The organisation enhances the skills of the employees in the international and intercultural area and achieves a competitive advantage through this. The participants of the HR project broaden their professional image (which means also a competitive advantage) as well as their own personal horizons.

Experience

The approach to the topic of intercultural learning works extremely well, since the contents forms a new challenge for the target group. The employees commit themselves with a new motivation in their working routine. Therefore the management is motivated by this new dedication of the employees to enlarge the area of the international projects.

Obstacles

In the regular work routine, the participants do not have the necessary time to realise the newly acquired contents.

Missing links

Which gains related to the regular work routine can be achieved by the employees due to additional time expenditures?

Success factors

New aims and challenges, which are developed by an employee at the beginning of the process, create a new motivation and a better work climate.

Setting / environment

The company provides a release from work for this HR project. The modules are carried out in blocks of two days and outside of the

daily working environment. An informal exchange between the employees is ensured.

Experience

After a short phase of adaptation the participants were ready to leave their regular work routine behind, were committed and able to be present. By the “island existence” of the seminar facilities hardly any opportunity for distraction were provided, which promoted the learning process. The employees felt valued by the management, because additional funding was made available. There was a possibility between the individual modules of putting the acquired knowledge into practice.

Obstacles

The time period between the individual modules had to be planned in such a way that the learning process could be kept continuous. Further more there were no reflection sessions between the modules with the project leader.

Missing links

None.

Success factors

As the learning process lasted over a longer period of time, there was the possibility to reflect the acquired knowledge.

Teaching innovative skills

Structural and methodical procedures were chosen in such a manner that both individual and collective study forms were made possible.

Experience

A variety of study forms, which made possible both individual and collective learning, was accepted with enthusiasm by the participants. To achieve sensitisation to intercultural situations and processes, personal experience was included through role plays following the theoretical inputs. In addition, the participants were encouraged by the project management and course instructors, to take responsibility for their own learning. The participants were treated as experts, and so experienced being valued and were highly motivated to engage in the learning process.

Obstacles

The attitude of just “consuming knowledge” is still present.

Missing links

Until now, studying cooperatively and on one’s own is very rarely applied jointly in adult education.

Success factors

The participants experienced the change of methods and the changes between various study forms in a positive manner, and saw in this acquisition of new competences for themselves. Altogether, the learning process can be developed in a more lively way.

Intrinsic motivation

Experience

As the HR project is voluntary, the participants are highly motivated and have a special interest in intercultural learning through their own biography, professional life, or their personal interest in travelling.

Obstacles

Additional commitment and time investment is requested. To keep the intrinsic motivation on a level high enough for the acquired contents, they have to be translated into day-to-day work.

Missing links

None.

Success factors

By taking into account the interest of the participants a high level of satisfaction could be achieved.



France

**The Alter Action Insertion project
the Integrating companies network**



3.2.3. France: the Alter Action Insertion Project – the integrating companies network

The objective of the French local project Alter Action Insertion, meant to create a network of firms integrating people with difficulties, is to allow the vocational insertion of individuals presenting an important risk of professional and social exclusion by facilitating their access to employment in the firms of the craft industry. The project involves three (kinds of) partners: the training centres, the employment offices, and the craft firms, collaborating within the “integrating business network”.

Actual experience concerning the French Project Alter-Action-Insertion- facing the following keywords: **motivation, social responsibility and process orientation.**

The *motivation* of the whole tri-partite set of partners (labour offices, firms, training centre) to take part in the network is *the most important factor*.

Tools will be set up to make awareness campaign and to promote the interests of the firms to get involved in the network.

Our project is based on a tripartite relation between the employment offices, the training centre and the businesses (mainly small and medium).

Factors of motivation

- Firms: to receive people with difficulties

For the actor “firms”, the most relevant factor identified among the different stages of Lifelong Learning is motivation. Indeed, the question concerning the protagonist “firms” is how to make them involved in a Lifelong Learning process?

The undertaking of the firm to welcome people with difficulties of insertion to offer them the possibility to discover a specific work environment and to make them discover a trade, will be an undertaking formalised.

The obstacles to the involvement of the firms can be as follows:

- The “price” (efforts) to pay by the firm: indeed, the firm that will be in the network will enter a relation based on a formalised set of principles:
 - It means:
 - Obligation to respect vis-à-vis the integration and the monitoring of the trainee in the firm.
 - Obligation to respect vis-à-vis the partnership relation with the employment offices and with the training centre.
 - Obligation of promoting the integrating businesses network label.
- The **critical size** of the network to reach to make it run: the network will be all the more attractive for businesses as other will have given the example and as the network will be lively (regular registration of new businesses).
- The **time to invest** for the firm while the results may appear only in a long-term.

For the firms, the success factors are the expertise brought by the network and the new source of recruitment proposed.

- Employment offices: to insert

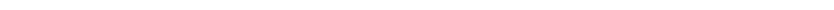
Employment offices “Missions Locales” and “ANPE” fulfil a mission of public service: to insert people in social difficulties into the world of work.

For employment offices, this new tool (the network) should help the actors of employment offices to insert people in social difficulties in the world of work:

- By giving them a feedback of the firms (another point of view) about the individual project.
- By developing a partnership (with the firms) in order to find new solutions about insertion of people with a high risk of exclusion.

To enrich the practices of the employment offices:

- To give a complete knowledge of the craft industry and of the respective trades.



- To know more about the real needs of the businesses.
- To set up trainings appropriate to the needs of the craft industry.

*The **obstacles** to the involvement of the employment offices depend on:*

- The leadership (animation) of the network, of the feedback of the link and of the quality of the relationship with the other actors.

*For the employment offices the **success factors** are:*

- To present and explain the method, goals and the tools of the 'integrating business network' to the counsellors of the employment offices.
 - To bring to life the network (between businesses, employment offices, call centre).
 - To set up an efficient and fast link in the system.
 - To organize a fast feedback of the results of the link. (The goal is to put in relation quickly the people with difficulties with the firms and to have a feedback on the probation period in firm of the individual).
 - To organize regular meetings to survey the state of the art:
 - To identify the obstacles and the missing links.
 - To adapt the organisation in function of these points.
- Training Centres: to train

Factors of motivation:

- To allow a transition without break between the world of the training and the world of the firm.
 - To allow the firm to integrate the trainee by taking into account all the aspects of its situation: Social – Psychological – Medical – Vocational.
 - **Extrinsic motivation:** Strategies of development:
 - To get to the trainee immediate pleasure by:
 - Quality of the reception.
 - Empathy of the collaborators.
 - Immediate feeling of membership in the firm.
-

- To let the trainee consider the unpleasant sanctions:
 - Stopping of the training course.
- To propose to the trainee goals which could satisfy her/him:
 - Presentation of the job to be occupied allowing to measure correctly the impact of the constraints associated with it on its life project.
 - Anticipation of the steps of the path in the firm allowing to verify if the activities, which will be carried on, take part well to the reach of the training objectives.

· *Obstacles:*

- The arrival of the trainee in the firm is not anticipated.
- Giving the trainee an activity is made without preliminary information and preparation.
- The training remains an external pressure, whose goals are forced by the social system.
- Insufficient mobilisation of the trainee to allow him to encourage his autonomy.
- Limited impact of the extrinsic motivations.

· *Factors of success:*

Upstream preparation of the arrival of the trainee in the company in order to allow her/him:

- To be conscious that the trainee activity contributes to reaching of her/his own objectives.
- To measure the height of the challenge with which s/he is going to be confronted.

· *Intrinsic motivation: Strategies of development*

- To lead the trainee to finding satisfaction in acting according to person's own expectations and to the objectives which s/he set to himself.
- To accompany the trainee while allowing her/him to negotiate

personal objectives of training starting from an authentic project of life.

· *Obstacles:*

- Very modest dimensions of the craft industry companies, being the reason of the unavailability of their employees.
- Attribution of tasks not corresponding to the objectives of the training by not taking into account the capacities of the trainee.
- Anarchistic acquisition of non evaluated competences involving the incapacity:
 - Of the trainee to measure the covered distance and the remaining distance to cover to achieve its goals.
 - Of the employer to check the quality of evolution of the trainee on her/his practice of the trade and thus to entrust him little by little with adapted tasks which s/he will be able to carry out in an autonomous way:
 - The trainee, subject to professional situations, has the impression to learn nothing.
 - S/He does not perceive coherence between the system of work which he saw in company and the system of training that experienced in centre of training.
 - The trainee questions her/his training path and vocational choice with not very objective criteria.
 - The employees of the company are badly prepared to take into account the specific problems of the trainee. They tend to project their own system of values on the trainee thus generating conflict and mutual lack of comprehension.

· *Factors of success:*

- To confront the trainee with activities through challenges to take up and problems to be solved:
 - By an adapted accompaniment, to place the trainee in an active position of search for information and solutions.
-

- To lead the trainees to carry out creative personal experimentation which will consolidate their feeling of competence and will support the success of training.

Social responsibility

· Objectives

If the firms decide to integrate into the network, they will take part in the Lifelong Learning process of the people lacking qualification and in difficulty.

The motivation to integrate into the network for the firm is both linked:

- To the will of being a socially responsible firm, to act as a citizen.
- To the will of entering a win-win partnership.

· Obstacles:

The obstacles to the involvement of the firms can be associated with participation in a socially responsible process.

· Success factors

The image of social responsible firm brought by the network and by the label given to the firm and all the possibilities of communication about the firm and its values through the tools developed by the network.

Process orientation

· Objectives

For the employment offices, the main reason to get involved in the network is the possibility to confirm or not the individual project (process orientation).

- To apply for a network which is able to validate the different stages of the path of social and professional integration.
 - To confront the individual project to the reality of the business.
 - To discover a job in real situation (during a short period) to confront
-

the individual representations and the reality: tasks, activities, environment.

- To look for a period in a business allowing to evaluate the competences and know-how acquired in the training centre.
- To evaluate the achievement of the knowledge by the business.
- To get a job directly.

For the training centre, the reason to get involved in the network is the possibility to confront the representation of the job to the reality. Vocational Training (to a trade).

The Training course in company allows the trainee to confront his representations of the trade acquired in the training centre with realities of a professional environment subjected to the constraints and risks of the market.

· *Obstacles:*

No feedback of the firms to the employment office or training centre which has sent the person to that firm (lack of exchange of information between the main actors of the network).

· *Success factors*

To bring to life the network (between businesses, employment offices, call centre).

To set up a working link that is efficient and fast.

To organise fast and effective feedback of the results of the link.



Italy
the VARCO project

3.2.4. Italy: the VARCO Project

Experience

The formative objective of the VARCO project was to define a diversified instrument that is different from the traditional ones for the appreciation of individual improvements.

Attention has been concentrated on weak workers or those that are at risk of being marginalized into the low education categories, like the handicapped, women over 45.

The methodology of the project foresees the transfer (individual dossier for transparency in learning) to companies, an instrument to create and sustain political-cultural-technical conditions that place value on human labour by means of recognizing the acquired skills of workers.

Obstacles

The VARCO project encounters obstacles during the transfer of information and also with respect to the adaptability of companies and employees.

Older workers are most often ostracised and do not have the actual work load (responsibility) attached to their experience acquired, nor an opportunity to recuperate the body of knowledge.

The other obstacle is that workers with lower educational levels encounter difficulties in the adaptation in the workplace, running the risk that they have knowledge and competence that is too traditional.

The female component is still prevalent at lower levels with obviously lower salaries.

Missing links

The difficulties that can be referred to as missing angles can be recognised both in the innovations that the project presents and the respective connection between the companies and the professional formation. The presence of a VARCO consultant is to increase the competences of the workers and to be a mediator between the company and the transfer of information to the works.

Success factors

Success factors are represented by the innovation in terms of change from process to project.

The true protagonists of the project are the participants (human resources managers and external participants) that need to acquire the necessary competences to realize the formative change needed to guarantee the total competences needed for the management of resources (individual dossier for the transparency of learning) inside the company that has participated in this new service.

Poland the **RENOWATOR** project



3.2.5. Poland: the RENOWATOR Project

The observations and comments here forwarded from the point of view of the Partners in the RENOWATOR Project, represented within the Working Group, that is, the Systems Research Institute and the Institute of Mathematical Machines, originate largely from the direct experience related to the Polish project, but also from more general considerations, based on the knowledge of situation in Poland.

Motivation

We consider motivation to be the driving force and at the same time the crucial factor for the Lifelong Learning. This applies equally to individual's motivations to learn, and the motivations of institutions and organisations to participate in and contribute to the Lifelong Learning.

Experience

The experience reported is the one of the Polish project, oriented, by formal definition of the target group, at the persons threatened with the loss of jobs, employed in the SMEs, and coming from the age group 45+, as well as women (and men) during and after maternity leave.

Thus, the *persons participating* in the project as the learners are *definitely highly motivated*. Even though the courses are offered for free, and all the additional costs (travel, accommodation) are covered, they all, in principle, participate in the activities at the expense of their free time, often in relatively difficult family conditions (e.g. mothers obliged to "organise" the care for their children). Participation in the courses requires also a considerable personal effort on their side in terms of learning itself (return to the scholarly experience after many years).

These participants, as a rule, do not inform their respective employers about the fact of taking the courses, nor are they delegated by their employers.

There are two main sources of such a situation, which is to a large extent typical for Poland with respect to the SME sector:

First, cost of employment is in Poland relatively (e.g. compared to average

personal income or purchasing power, which are decisive for the market situation) high. This fact is beyond any discussion and for years now efforts have been made to force the successive administrations to lower these costs (it is estimated that on the average a fully employed person costs an employer twice the net pay this person obtains). *Thus, delegation of an employee to a training during working time is for most of the SMEs too costly an undertaking, even if the employer does not cover the (direct) costs of this training.* In addition, the employers try to avoid at least a part of costs by (officially) subcontracting definite work to “individuals” or the “self-employed”, who, in fact, often are, unofficially, the employees of these companies. Under such circumstances the employer does not bear, at least formally, any responsibility, for the “employability” or other aspects of competence of the subcontractor/employee. This situation is both observed in objective terms, and constitutes the justification pronounced by the SME managers and owners for their significantly limited activity in the domain of Lifelong Learning (e.g. employability) of the employees.

Yet, the fact of not informing at all the employers of the participation in the courses, even outside of the working time, has definitely also another source. This observation points out to a general low level of positive consciousness among the Polish SMEs concerning either the social obligation of securing “employability” of their employees, or the advantage resulting from having their employees upgrading their skills (contrary to what they declare themselves). This results from (I) the fear that an employee with enhanced qualifications may look for another job, which is increasingly true now in Poland, even though joblessness rates remain high, for these high rates are largely of structural character, and, in addition, the hidden economy is very important, so that acquisition of a more sought competence may be a true *laissez-passer* to a much better job; and (II) lack of deeper (i.e. truly internalised) awareness of social responsibility with respect to own employees (even though such an awareness may exist with respect to other aspects of “social responsiveness”).

As mentioned in other comments from the Polish side, the phenomenon of increased tertiary schooling is paramount to the Polish scene of the last 15 years, including also the elements of Lifelong Learning (numerous students being recruited from the somewhat older age group – persons in the late 20s and early 30s). Likewise, there is a deeper conviction that people have to (continue to) learn in order to maintain their life chances

of whatever character. Thus, motivation with respect to learning, and continued learning in that, is a more general phenomenon (even if geographically and socially strongly differentiated).

With respect to the latter statement two aspects ought to be emphasised: (1) motivation is stronger with the persons having already an experience of longer period and higher levels of education (e.g. persons with university or college education taking courses changing or broadening their field of competence); it has, in particular, become relatively popular now in Poland that young people continue to study at different faculties, often while already working, the phenomenon virtually not observed under the communist rule; (2) the learning “habits” are more pronounced in the areas considered “traditional” or even “conservative” (as, e.g., apparent through the outcomes of political elections), meaning the areas where, on the one hand, families and local communities continue to function in a traditional stable manner, and, on the other hand, school and teachers enjoy high social status.

Obstacles

When we refer not only to the Polish project represented within the CEMA-NET, but to a broader social background, the primary obstacles to Lifelong Learning appear to be:

- Shortage of easily available and not excessively “academic” courses, which would be matching the market, and at the same time offer some kind of advanced knowledge (this shortage varying in geographical and social space).
 - In particular – shortage of the above in the public domain (unpaid courses).
 - Lack of “permanent education” culture within a vast proportion of the society (closely associated with [lack of] motivation), due to broader cultural background, to the direct social environment or personal experience.
 - Lack of “permanent education” and related social responsibility culture with the owners and managers of the SMEs (even if they recognise their social responsibility in other domains).
 - Conviction of many of the SME owners and managers that they are not in the “education-intensive-sector”, related first of all to the functioning of the economic mechanism (lack of “adequate financial
-

resources”, whatever this may signify), i.e. that it is the large companies that can afford constant upgrading of skills of their employees, and that the technical and technological progress takes place mainly within these large companies.

Now, concerning the project itself, the target group was defined quite narrowly vis a vis the market demand, so that the partners could not provide service to, for instance, the unemployed or the employees of larger companies, who applied for participation. The actual demand came from all the segments of the society (in case of larger companies – also from the companies themselves, in distinction from the situation within the SMEs). It appears that the definitions of the target groups, for similar projects to be appropriately effective, ought to either be quite precise (e.g. a definite professional group), or more flexible (only one kind of “boundary condition”, e.g. on age, gender etc., but not on the kind of company, or vice versa).

Missing links

Missing links are directly related to the obstacles mentioned above. In a broader context this means first of all *public, accessible, flexible, market-oriented educational service* for the actual implementation of the Lifelong Learning in addition to the existing facilities, which are either too academic, or too demanding in terms of time and effort, or paid, or far away.

Such a service could be organised on the basis of the existing non-public sector, vested with appropriate tasks, especially directly oriented at the permanent adult education, and compensated for in an organised manner by the local authorities, companies, NGOs, as well as the participants themselves. Yet, the resulting infrastructure should possibly avoid the typical bureaucratic stiffness of (public education proper) structures and contents, and the way to do this is to apply a kind of market mechanism in the sense, e.g., of diversified educational bonuses (depending upon the category of the beneficiaries), for which the operators would be compensated.

Given that cost, on all sides and of all kinds (i.e. including time, externalities, etc.), is an important factor in the play, the infrastructure proposed should include possibly broadly the e-learning capacities.

Success factors

Within the project the primary success factor was the very provision of interesting, well-prepared and matching the capacities of the potential learners courses and then probation tasks. In a way, therefore, the project was “doomed to succeed”, given its initial concept. This is also the proof that this kind of activity or service constitutes indeed a “missing link”.

In this connection the fact that e-learning is used within the project is also one of tangible success factors.

On the other hand, this success would not be possible without the crucial factor of success, namely demand (motivation), driven not just by the market situation (fear of losing job), but first of all be the conviction that it is both possible and effective to learn, even if there is no guarantee of getting a (better) job at the end of pipe.

Slovakia



3.2.6. Slovakia

Motivation

Experience

The target group in our project are the unemployed persons, and especially the long-term unemployed. Their skills are quite low or have already expired. The job of the specialist at the labour office is to convince those people to do something for themselves. This starts from psychological assistance to their motivation, and continues through giving advice concerning personal life and finding a job. When a person has low or expired skills, the advisor can suggest a retraining. Motivation to learning resides largely on good, appropriate choice of this retraining. The expert system that is being developed within the project, should help in identification of the appropriate kind of retraining.

Obstacles

Long term unemployment marginalizes people in many fields of life. They do not have a positive approach to seeking of a job or increasing their skills. The social workers at the labour offices try to help and *motivate* them. The problem is constituted by the low level of the basic schooling, and the fact that some people do have even this basic schooling. It is especially for such people that a well selected and sensitive kind of labour policy is important. Indeed, motivation to skill upgrading should include the possibility of income improvement, but the relatively low level of wages, particularly at low skills, and a relatively high level of income from social and unemployment benefits form an obstacle in this field.

Missing links

The main missing link exists between the legislation and the regional situations. The legislation regarding the social benefits is set for the whole of Slovakia in a uniform manner, and does not account for the regional specific features. The benefit payments may be very thin in the capital region of Bratislava, while being relatively sufficient, although nominally the same, in some poor region of the country. This fact bears an important influence on motivation. The aim of the activities on the project is not to have the legislation changed. Yet, through adequate psychological work on motivation at the labour offices, and the corresponding perspective,

as well as an adequate choice of retraining and the future job, it should become possible to push the unemployed to working for their own selves.

Success factors

We expect that the expert system under development should help in finding an adequate prospective retraining activity and thus in motivating people. When an adequate system is also implemented that would be capable of providing information on the future trends on the labour market, these two systems will make the advice of the specialists at the labour offices concerning retraining much more effective.

Vocational guidance

Experience

The labour offices include the established manpower for vocational guidance. The specialists working there are well qualified for social work and psychology. They are able of identifying their customer problems and provide appropriate recommendation. Yet, it must be admitted that they lack adequate, or sufficient knowledge about the labour market.

Obstacles

Lack of information about the labour market and its future development may be a limited factor to the possibility of offering the best advice to the clients concerning their future work and the retraining required and/or best fitted.

Missing links

There exist missing links between the labour offices and the labour market, as well as inside the labour offices themselves. The advisors and the labour offices in general do not have good connections with those, who are specialists in the labour market. Moreover, the labour offices do not dispose of forecasts concerning future trends on the labour market.

Success factors

In the expert system under development we try to join together the

identification of the future trends on the labour market and the expert opinions and advice, as well as the expert advice concerning various aspects. The system should give an evaluation concerning the customer, as acquired from the labour office specialist, transformed for the purposes of the expert system, and then adds to it the information dealing with the trends on the labour market.

Path building: vocational positioning and training project

Experience

Positioning is closely linked to demand on the market. Labour offices dispose of some (perhaps not sufficient) information about vacant jobs, but definitely do not dispose of any information about future vacant jobs.

Obstacles

The time delay between the announcement of jobs available and the end of the process of retraining, having started at the time of announcement of the vacancy, is so big that when a person graduates from the course, the job is as a rule already occupied.

Missing links

The offer provided by the educational establishments is of good quality, but it is focused on the current labour demand. The forecasts of the economy and the labour market at the regional level might help a lot in identifying the appropriate courses and retraining programs for the future.

Success factors

The forecasts concerning the future trends on the labour market will increase our chances of retaining people and giving them skills that will be in demand at the labour market in the near future.

Training: evaluation

Experience

There is no evaluation of the real impact from the re-qualification and

retraining and the implied success on the market. What is known is how many persons end the retraining programs successfully. This number, though, is not interesting, because from this point of view the share of successful participants is close to 100%, while this is far from the truth about the real-life success of those persons, which, in our opinion, would have to consist in effective placement on the labour market.

Obstacles

It is difficult to identify the success factors in effective job finding, because once a person finds a job, the communication with the labour office terminates. Although it is true that the persons involved are obliged to report whether they found a job or got employed, but the analysis of causes and mechanisms behind is missing.

Missing links

There is no information on the situation when a person changes the status from the jobless to an employee. We will try to convince the labour offices and their clients to evaluate the influence of the retraining process on the effectiveness of labour market placement. This amounts to assessing the degree of influence exerted by the retraining process on the placement on the job market.

Success factors

With the help of this information we will be able to better evaluate the effects of the courses provided. The feedback established would then have an influence on the preference given the particular courses, this preference being included in the advice for the labour office clients.

4

conclu sions and recommen dations

conclu
sions and
recommen
dations



4.1. The logic of conclusions and recommendations

On the basis of the considerations presented, a discussion took place, aiming at formulation of the final conclusions and recommendations concerning the critical factors for the effective and efficient realisation of the Lifelong Learning in the European context. This final chapter of the report contains the output from this discussion, which is also summarised in the introductory part.

Conform to the structure of discourse, whose results are documented in the present report, the conclusions and recommendations are divided into:

- Critical factors: the *essential conditions*, whose fulfilment is necessary (critical), or the *barriers*, whose removal is essential for the appropriate, effective and efficient, course of the Lifelong Learning processes; discussion has been largely focused on identification and explanation these factors and the consequences thereof, these consequences appearing in the consecutive sections of conclusions and recommendations.
 - Ways of coping: the *methods and mechanisms*, which can be referred to and used in order to secure that the *critical conditions are positively fulfilled*, or the *critical barriers overcome*; it should be noted that the ways of coping may be of quite varied character, belonging to quite diverse spheres (pedagogical, social, psychological, administrative, fiscal, etc.); that is why in the subsequent sections various spheres are considered, especially in terms of recommendations.
 - Support necessary: these conclusions and recommendations point out to the necessary *external conditions* that take on in practice the form of support for the Lifelong Learning processes; it should be noted that this support may be extended from various sides and at quite varied levels, notwithstanding its importance for the ultimate course of the Lifelong Learning processes.
-

- Social network: it is recognised that the course and success of the (potential) Lifelong Learning process depends to a large extent upon the social environment of the participating individuals (culture, habits, experiences,...), and the collaboration within this environment; this section takes up, therefore, the aspect of the social network, within which the respective processes take place.
- Policy mix: finally, *policy tools* are proposed (recommended) that should help in realisation of the objectives of effective and efficient Lifelong Learning; these proposals are addressed at different policy-making levels and types of measures; the members of the Working Group of Lifelong Learning are persuaded, though, that implementation of such measures, when done in conjunction with realisation of these that lay outside of the policy spheres (see preceding sections), would lead to the attainment of both these objectives of effective and efficient Lifelong Learning and the broader and more important social and economic objectives of sustainable development at all levels.

The following five sections are devoted to presentation of the output of work of the Working Group according to the above division and logic. Each section is illustrated with a photograph showing the stage of brainstorm-based listing of the respective conclusions and recommendations, conform to the structure adopted, before the discussion, explanation and editing stages. This illustration is then in each case followed by a concise list of respective items, (some of) which are explained in more detail.

4.2. Critical factors

The **critical factors**, as formulated below, are "negative", that is: presented as negative phenomena, *barriers, gaps or shortcomings*, which ought to be somehow overcome. They are related, first, to the situation of an individual, or a definite group, and then to the characteristics of the providers, that is – the educational, training, coaching, etc., organisations and institutions. As such, these critical factors can be seen as "specific" or oriented at the micro-level, not

implying, at least directly, at this stage, any more general and policy-related conclusions nor action types. It should be emphasised that *lack of intrinsic motivation* was considered to be by far the most important negative critical factor of all.

It is the necessity of dealing away with these critical factors that gives rise to various “instruments”: methods, techniques, institutional and organisational solutions, as well as policies at various levels, which are all oriented at securing an effective and efficient realisation of the Lifelong Learning processes for the individuals and within the society at large.

The subsequent section of conclusions and recommendations presents, therefore, the most direct, pragmatic approaches that help in dealing with the critical factors, named here the *ways of coping*.

Critical factors concerning learners and providers

Lack of intrinsic motivation

Lack of time and money: critical financial situation and insufficient time resources of the individuals

Lack of awareness on the side of the learner as to the existing learning possibilities

Lack of habit and culture of organising oneself individually and/or in a group (habit or culture of dependence on outside institutions)

Lack of personal responsibility (both deciding and bearing of decision consequences is left to others)

Blocking or traumatic life events, like, for example, being fired after a long period of stable employment

Neglecting and ignoring intercultural differences in general (on the side of providers)

Disinterested and unprofessional managers, decision makers (e.g. lack of recognition of the need to learn) and teachers

.....

Critical factors concerning learners and providers

Insufficient access to learning opportunities in other terms than mentioned above (potential learners are offered the learning possibilities that are too narrow, too selective and too distant, as well as subject-wise ill-adapted to the demand from the learners)

Different individual learning strategies, actual and potential, not being recognised from the side of the learning providers

Neglecting the existence of critical factors

4.3. Ways of coping

Conform to the sense of the critical factors, outlined before, the **ways of coping**, presented here, address those factors most directly of all the potential instruments deployed further on here, and so we are at this point still at the micro-level, with, however, some implications of a more general nature.

Ways of coping (dealing with the critical factors)

Offering flexible modules adapted to the time budgets of the learners

Providing help for self-evaluation and reflection

Learn-guidance, acting as a coach, not (only) as a teacher

Focusing on competences and qualities, rather than on the “weak” points

Giving appropriate possibilities to act autonomously

Giving individuals the responsibility to make own choices of the career path (empowerment)

Learn to understand change management and be able to manage changes

Secure supportive learning environment and setting

.....

Ways of coping (dealing with the critical factors)

Secure support for and adequate payment of teachers and scientists (content-providers)

It is natural that these ways of coping are addressed primarily at the immediate providers and the institutions responsible for organising the Lifelong Learning processes. Here and further on the formulations are of the “positive conditions” for the proper course of the Lifelong Learning processes.

4.4. Support necessary

The **support necessary**, as stipulated here, is formulated in quite general terms, and refers primarily to the “external” practical conditions necessary for the success of the Lifelong Learning processes, even though some of these conditions are quite broad and far-reaching.

Support necessary

Secure an effective, transparent and formally acknowledged modularisation

Provide adequate support to cooperation in interdisciplinary teams (“trans-disciplinarity”)

Provide for the equal opportunities and free access to knowledge in general for each individual (equivalent to conditions on adequate infrastructure, flexibility, broad offer)

Offering trainings in leadership and motivation instruments to create good working atmosphere and motivate employees. For this, it is necessary to implement the institutionalised feed back processes

Develop a positive model image and a guiding philosophy of continuous education to be implemented by families, school and authorities

State-governed, but open to all kinds of formally acknowledged

Support necessary

Lifelong Learning offer, web-sites with information about learning and formation possibilities, free of charge information on the subject

4.5. Social network

Given the recognition of the enormous role of the **social network**, forming through family, kin, neighbourhood and peer relations the conducive or discouraging background for the actions of any individual with respect to Lifelong Learning, any “outside” activity (support, policy, etc.) to be undertaken has to account for this role and the possibilities of shaping it.

Social network (conditions based on the potential positive and negative influence of the social network on the individuals)

Acceptance of idealism and a specific personal orientation

Support for social recognition and enhanced identification

Improved exchange between professionals, including exchange of best practices and promotion of free access to all individuals

Help to networking oriented at improvement of intensity and quality of social networks

Work-life-balance: provision of good infrastructure for combining private and work life

Generally: recognition that family, community and peer-groups with their social and cultural background can significantly influence individuals in a positive or negative way

4.6. Policy mix

Policy mix: this is the crucial section, dealing with explicit *recommendations*, as it addresses the potential instruments, operated on the policy level, whether European, national, or of local administration.

The proposed policy mix, forwarded here, encompasses various kinds of instruments, applying directly to the educational sphere (the internationalisation of certificates, the advanced modularisation and validation), but also to the joint social and fiscal instruments (social insurance “bonus” schemes, social assistance emphases, tax reductions for realised continued training and education, etc.), to the regulations concerning employer-employee relations (including labour law), the media and political involvement and the mobilisation of actors engaged in the Lifelong Learning processes, down to the explicit use of ICT and the additional capacities these technologies offer.

The items appearing in the policy mix below constitute an attempt at summarising the instruments that should secure the fulfilment of the conditions formulated before under the *ways of coping, support necessary* and *social network* headings.

Policy mix

EU support for the requirement of an English/international version of certificates

Broad and detailed modularisation / certification (e.g. Bologna process and its extensions)

Install and enhance the competence verification communities (related to chambers, associations, boards, trade organisations, etc.)

Lifelong Learning educational bonus. A part of social insurance premium diverted to the possibility of learning over entire life span, with open choice of the way of using it within the certified set of institutions and specialisations

Direct positive policy actions toward social network institutions (family, neighbourhood, community, school...), e.g. social aid extended and reinforced in case of continued education, orientation of social work towards education rather than upkeep, counselling towards the use of Lifelong Learning bonus (see above), etc.

Support learning through public media campaigns (promote a positive

.....

image of Lifelong Learning)

Sustainable promotion of Lifelong Learning projects and stable position of opinion-leaders in politics

Secure the means and methods (including ICT) to identify and use in practice the competence profiles of the employed / unemployed

Set up and maintain broad educational offer websites, with the capacity of interactive use and search for an own path, including employment possibilities, financing schemes and further education perspectives

Top-down and bottom-up strategies: securing that both decision makers and employees are integrated in the change processes

Promoting preventive health programmes in companies, schools and other organisations

State support for employees and corporate actors for education (e.g. tax reduction) paying for further education courses

Law applying to employers, guaranteeing the participation of employees in further education (graded, depending upon the employer's capacities, and encompassing various instruments: working time, paid leave account, paid training, contracts between employees and employers, etc.). These should in particular account for the SME sector

Commitment of all social partners for new political strategies concerning Lifelong Learning

Promotion and facilitation of flexible time-work models (with the use of the ICT, in particular)

Promotion of work life balance and corporate social responsibility

.....



Attachment 1: List of Lifelong Learning Working Group members

Attachment 1:
List of Lifelong
Learning
Working Group
members

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Attachment 2: **List and brief descriptions** **of national projects and** **partnerships represented** **in the Working Group on** **Lifelong Learning.**

Attachment 2:

This attachment contains shorthand descriptions of the projects / partnerships, in which the Working Group members are involved. These descriptions provide the material underpinning, in particular, these considerations contained in the main body of the report, which relate to the areas of interest and of concern (and their overlapping or complementarity), as well as the key notions, and finally the critical factors. The sequence is again, alphabetical according to countries.

A u s t r i a

Development Partnership Gesundes Gesundheitswesen "Healthy Health Care"

DP partners and HILL International

The list of partners below follows the scheme of modules (M) forming the work area of the Partnership:

- M1 -networking: Institute of Humanistic Management www.human.or.at
- M4 -improvement of quality of work: Human Health Design www.hhd.at
- M3 -qualification Communal Documentation Centre: www.kdz.or.at
- M5 -qualification: Work Medicine Centre Mödling: www.amz.at
- M 2 -development: HILL International: www.hill-international.com, e.g. www.berufskompass.at is a similar project to this DP in terms of topic
- **others:** Trend Event (PR), Bundessozialamt (Finance), Strategic Partners like Health Insurance, Medical Chamber, Chamber of Commerce, Trade Union, NGOs, University of Health Care System, etc.

Objectives of our Part (Module 2)

HILL's project Module 2 is meant to develop a screening test for nurses which should:

- Show them that they can & have to trust in their specific Know How.

- Help them to find out their coping mechanism, individual resources, job based strains etc.
- Give them feedback on their personal traits, skills and strengths
- Allow them a personal view on their specific job and systemic circumstances (depending on the health care system / department).
- Give them objective results for their next appraisal interview with the department heads and HR responsible person.
- Allow the management an objective view on their HR performance.

Target group

- Nurses and somehow also other professions in the health care system and hospitals.
- HR departments in hospitals and managers, leaders, department heads.
- Individuals who want to be re-integrated or re-skilled in the Social and Health Field (the labour market brings new positions).
- Everybody who feels exhausted and drained.
- Everyone who wants to protect himself / herself against burn-out syndrome, physical strains, internal cancellation etc.

Activities

- Enquiry of the Status Quo (appraisal interview, occupational aptitude & diagnostics, forms of praise & estimation, corporate-culture etc.)
 - Strengthening the empowerment through the cooperation in the development (nurses are invited for interviews to ensure our hypothesis).
 - Enhancing the commitment in the involved Hospitals & institutions.
 - Showing the participants that lifelong education brings them more work-satisfaction and encourages motivation to continue in their occupational field & profession.
 - Finding a hosting partner who would care for sustainability and continuity of the new online tool in the health care system.
-

Expected results and evaluation

- Nurses and employees in the Health Institutions & Hospitals are staying in their jobs and profession.
- Those employees are both objectively and subjectively fit to their positions, functions, occupational career and life planning.
- Hospitals' HR managers are provided with a new, valid instrument.
- Acceptance that the whole system, the success in the health care system and their personal health is depending on a satisfactorily occupational perspective.
- Many visitors and satisfied users on that online-tool (Screen Your Competence).

Relation to Lifelong Learning

- Professional education must be there, but vocational training is necessary.
- The employees are well educated but have no or limited perspectives for their individual careers.
- Changing the job does not necessarily mean a complete change of their profession.
- Everything they have learned is also useful in other disciplines (care, mediation, conflict resistance etc.)
- There is an Empowerment and Self-reflection online-tool (anonymous but useful for individual career planning).

Expected obstacles

The health industry employs approximately 330,000 persons and is therefore the largest employer in Austria. Problems which occur are:

- There is a great shortage of (wo)manpower.
 - Premature retirement of health service staff.
 - Bad working conditions, lack of vocational training and career management.
 - Lack of money and resources (time tables, pressure, health system in Austria paid by the whole society etc.)
-

- Convincing the managers to face long term goals rather than just carrying out short term activities.
- Global opinions like 'we are doing enough' for our staff.

Adaptability and possibilities of transfer

- Gap between Austria's Health Care System and other countries?
- What are other countries (or health care systems/ responsible politicians) doing for satisfied work (see the demographic data – people are getting older etc.)?
- Do Health Care Institutions in other countries care about vocational internal career planning & HR activities?
- Maybe: translation of our new tool than to English would provide the possibility of testing whether it is useful for others to do it as well?
- Tool will be validated with Austrian nurses; is an application for other countries possible?

Partner HILL International GmbH

- Human Resources Partner since 1975 with more than 35 offices in 20 countries (mainly CEE and SEE).
- We help managers and our customers with HR based on humanistic business and work psychology.
- HILL Competence Analysis developed in our R & D Department is an objective test for traits, interests, concentration, abilities etc. in 15 languages.
- In Recruiting (Search & Selection), Personal and Organisational Development e.g. leadership, motivation, Coaching, special projects like www.berufskompass.at or the HILL Competence Analysis is used for HILL Individuell as well (career counselling).

F r a n c e

Alter Action Insertion project

The context

The French EQUAL project taking part in the CEMA-NET TCA is the

AAI: Alter Action Insertion project. This project is realised in the department of Somme, about 150 km North of Paris. The project is led by the Chamber of the small business and handicraft sector of the department of Somme, in partnership with many local organizations, working in the field of social and professional inclusion, employment and training.

To have an overview of the context: the number of inhabitants in the Somme area is nearly 555 550 and the number of inhabitants in the agglomeration of Amiens, which is the main town of the department, is 175 000. The unemployment rate in the department is about 11.1%.

The main economic and industrial activities are centred around the agro-food industry, the chemical and plastic industry, mechanical equipment industry, metallurgy and metal processing industry. Agriculture also plays the main role at the economic level.

The context justifying the project is the existence of an important handicraft and small businesses sector. Indeed, the number of small businesses (less than 10 employees) in the Somme area is about 6 420. This sector provides a large number of job offers and vocational trainings in the Somme department. Those job and training opportunities could be opened to the public in difficulty but are at the moment not sufficiently utilised.

The branch-wise distribution of the handicraft and small businesses in the Somme area is as follows:

- Food sector: 16% (1028 businesses).
- Building sector: 33.2% (2132 businesses).
- Repairing sector: 13.2% (846 businesses).
- Production: 16% (1023 businesses).
- Services: 21.6% (1390 businesses).

The problem to be treated in the AAI project is constituted by the difficulties encountered by the public in precarious situation, people in vocational training, and young people looking for a job for the first time.

The small and handicraft businesses can enable social and professional

integration, if the way they are run is taken into account and if the plans of action fit their requirements by creating new tools and new methods of training the target public and the in-company tutors appointed in the businesses for each trainee.

Our objective is to set up an efficient network, which can be the basis of a business integration plan used in many different ways.

The objectives of the project

The general objectives of the Alter Action Insertion project are:

- To facilitate the integration and the employability of the public with a high risk of social and professional exclusion, into the small businesses.
- To further and improve the conditions of equality and the struggle against discrimination.

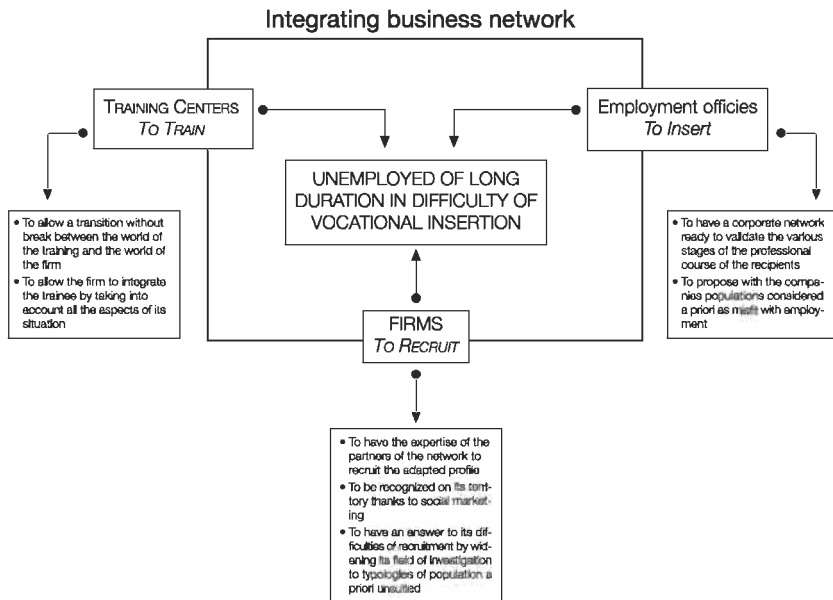
Through working on:

- The social adaptability of the small business sector.
- The integration strategies linked to the notion of individual responsibility and social cohesion.

The operational objectives are:

- To work in partnership with local protagonists active in the fields of social and professional inclusion in order to create innovative methodologies and tools.
 - To create a business network with an appropriate value-oriented label.
 - To set up thematic working teams at the local level in charge of developing innovative strategies.
 - To use the concept of social marketing to realize awareness campaign for target publics (individuals with difficulties, small businesses, project partners,...)
 - To set up micro-projects to develop more specific actions according to the typology of the respective public.
-

The tripartite structure of the Alter Action Insertion project



Activities

- **Activity 1:** Creation of a plan at the level of the department of the Somme of integrating individuals with difficulties into the craft industry:

Action A: Setting up and leading of a network of small businesses which commit themselves to integrating the targeted audience in the craft industry in the department of Somme (the name of the network is "R.E.I.", "Réseau d'Entreprises Intégratrices").

Action B: Setting up of a database –Technical and network management.

Action C: Creation of a call-centre in charge of linking with the firms as well as organizing and managing supply and demand for a training period or for a job.

- **Activity 2:** Making small businesses aware of social issues

and creating training towards the main protagonists involved in the project (monitors in the firm and people working in the integration sector):

Action A: Training for the monitors belonging to the integrating network on the aspect of integration and maintenance in small businesses of individuals with difficulties.

Action B: Information and awareness campaign on the technologic development of the small businesses in the sector of craft industry for the experts of professional insertion to improve guidance of the target individuals.

Action C: Putting information on line.

- **Activity 3:** Information, active communication and social marketing:

Action: Setting up of a transversal policy of social marketing towards firms and individuals with difficulties.

- **Activity 4:** Interactive management of the project (website).

Action: Creation of a website for the general public and for the direct partners of the project, at a local and transnational level.

- **Activity 5:** Struggle against inequalities

Action: Setting up of specific plans integrated in the general business network for individuals with high difficulties (specific monitoring).

- **Activity 6:** Funding, personal investment project and monitoring

Action A: Creation of special help funds for publics in difficulty.

Action B: Organisation of monitoring actions including the idea of personal investment linked to self-esteem.

- **Activity 7:** Creation of a social observatory in the sector of small businesses.

Action: To evaluate how a business network can be used for developing innovative actions in order to facilitate professional insertion of publics with difficulties.

- **Activity 8:** Setting up of a transversal mainstreaming strategy concerning the unequal treatment between men and women.

Action A: Setting up of a mainstream action plan.

Action B: Thinking of the change in the professional practises.

Action C: Training courses.

Action D: Development of partnerships and communication actions.

- **Activity 9:** Evaluation of the local project by a private and external service provider.

G e r m a n y

Zukunftsfähigkeit durch Interkulturelle Personalentwicklungsstrategien (ZIP) Sustainable Intercultural Human Resources Development Strategies

National Partners:

- BBQ gGmbH (Vocational Training Institution)
- Berufsbildungswerk ENAIP e. V. (Vocational Training Institution)
- Forum der Kulturen Stuttgart e.V. (Non-Profit Migrant Association)
- Institut für regionale Innovation und Sozialforschung IRIS e. V. (Research Institution)
- Jugendamt Stuttgart (Youth Welfare Office – Stuttgart Town Council)
- Deutsch-Türkisches Forum Stuttgart e.V. (Non-Profit Turkish Association)
- Schulzentrum/Akademie Silberburg (Vocational Training Institution)

The activities of the DP

1. Cultural Diversity Audit Procedures for companies and public institutions.
 2. Development of innovative models for international vocational training ("international skilled worker certificate")
 3. Training of decision makers, managers and disseminators in regard to the intercultural dimension within companies.
-

4. Development of informal learning strategies inside and outside of the work situation.
5. Training of intercultural transition counsellors through the use of sustainable cooperation-, network-, empowerment-, coaching-, training-, and diversity-strategies.

Statement of the national coordination of zip

The underlying common theme of the development partnership zip is the concept of cultural diversity. Faced with globalisation and increasing migration every individual enters into contact with many different cultural situations. Thus, in her or his professional life, dealing with a multitude of cultures requires a special competence – intercultural competence. This competence is not acquired by reading a book on the theme or participating in a one day-training. The development of that skills requires an Lifelong Learning process, which is often more informal than formal. It is a process, which can be initiated by institutions, but requires individual effort and motivation.

The development partnership initiates and facilitates the acquisition of this competence in several ways:

- Initiating dialogues on the topic on a broad base.
- Providing experiences to individuals to come in contact with different cultures.
- Training of decision-makers in companies to deal better with cultural differences.
- Auditing of companies regarding their diversity strategies.
- Encouraging employees on all levels to reflect on the concept.

Statement regarding Zip.EuroSkill

Our target groups are:

- Employees in BBQ gGmbH.
- Apprentices in the metal- and electronic-industry.

The major aim is to broaden the horizons of the apprentices and the employees as well, on a personal level as well as on a professional one, to prepare them for the European labour market.

The employees of BBQ are undergoing a training spread over eight modules to get knowledge and competences in monitoring intercultural learning processes. The apprentices were, after a preparation seminar of three days, on an internship abroad, to get the chance to develop intercultural soft skills.

With respect to the Lifelong Learning aspect of our project, a very important point was to get good feed back at the end from the participants, along with good results from the project in general.

At the beginning of the project we needed to find out, who has the motivation to invest something in addition to their daily work. For all the participants it was their own voluntarily decision to be involved in the project and in the learning process.

Further, we had the experience that it was very important for the learning process to follow the targets, which were verbalised by the participants. In this way, without losing the *thread*, the trainees got the feeling that they are experts and that we take them seriously.

This point is very closely related to the point of process orientation. We had always a very effective learning atmosphere, because we always took care of assessing the current standing of the group and the current needs of the group, always in relation of the primary goals, the underlying *thread* and the superior subject.

Support for the learning process was extended, on the one hand, to learning in the formal settings, while, on the other hand, the participants were supported in the continuation of the learning process in an informal learning context. Thereby, the participants got the chance to learn through experience in the real-life practice and not only in the theory.

In this manner we got the feedback allowing for stating that the participants were working with a big potential of personal responsibility.

Last but not least we reached a win-win situation. The companies invested and supported the employees in joining this offer of advanced training. Because of the mentioned strategies in designing and managing the learning process, the participants got new and better knowledge for the European labour market of the future. After the

participants finished the training, they were coming back to the company, with new knowledge, new competences, an advantage for the company regarding all the changes of the labour market.

Finally, because the intercultural learning process is an Lifelong Learning process, in our experience it is important to consider some of the above mentioned points to make an Lifelong Learning process possible and successful.

Statement regarding project managers in Zip.EuroCompetence

Statement I

Zip.EuroCompetence offers a development of learning components for the advancement of international key competencies for immigrants from Italy, Croatia and Turkey.

The project is based on business Italian, Croatian and Turkish lessons for young people that are doing a professional vocational training in Germany (dual system) or already finished it.

*Zip.EuroCompetence offers:

- Business Croatian, Italian and Turkish lessons and workshops, 3 hours per week on Saturday in order to promote technical language competence and understanding of different cultures.
- Stage of 3, 4 and 5 weeks in Croatia, Italy or Turkey.
- New form of international qualifications for immigrants realized and to realize with growing collaboration between social and political partners and enterprises.
- Professional consultancies in order to support the development of the skill of a self evaluation both on the educational and working level in order to stimulate initiative.

The target groups are Croatian, Italian und Turkish immigrants of second or third generation who live in the area of Stuttgart.

Most of them are making a vocational training in economics and, at the same time, are attending the lessons and workshops offered by the project (in Croatian, Italian and Turkish) every Saturday for 3 hours,

(*explanation from Emanuela Tierno)

for at least 1 year.

With the project, they have also the opportunity to make an internship in Croatian, Italian and Turkey and receive, at the end of the project, a qualification (in Croatian, Italian and Turkish) in the same sector of the German vocational training, but written in Italian, Croatian and Turkish.

This second qualification, offered by the project, is recognised not only in Germany, but also in Croatia, Italy and Turkey.

A vocational training is based on a contract between a company and the trainee (Ausbildungsvertrag).

In the company the trainee makes practical experiences and, at the same time, he goes to school two days per week. In Germany we call it "duales System" (dual system). This form of training does not exist in all the European countries, that is why the qualification in Italian, Croatian and Turkish that zip.EuroCompetence offered in the same sector of the German vocational training, after a written and oral exams, allowed to recognise the German vocational training of the young people in Italian, Croatian and Turkish.

The students (mostly immigrants) are investing voluntarily three hours every Saturday and are really motivated because are improving the abilities of writing, reading, listening and speaking in their mother language (Croatian, Italian und Turkey), that they learn in Germany with the family and friends, but not a school where, obviously the language was German.

The lessons are made up of:

- Conversation about actual political, commercial and social themes in Europe.
 - For example, we talked about the theme "equal opportunities" especially because this year is the European year of the equal opportunities.
 - Grammar exercise in Italian, Croatian or Turkey.
 - Creative exercise in order to repeat the therms.
 - Business correspondence and telephone conferences.
-

They reported that they learn:

- To not be afraid to speak and read a long text in another language.
- New interest for economic, social, and political themes.
- Technical terms.
- Commercial correspondence.
- How to write an application and make a job interview.
- The Italian mentality and atmosphere on the job.
- How to converse on the phone.
- Business contact with partners.
- Italian grammar.
- Legal foundations in Italy.
- Teamwork and single work.
- Discussions in groups about actual.

They report, also, that they have to invest:

- Regular participation in the lessons.
- Concentration during the lessons.
- Commitment.
- Spare time.
- Homework.
- Curiosity.
- Discipline.

Zip.EuroCompetence finishes officially with a certificate in English, German and Italian, after an oral and writing exam, but this not means that the development of learning will finished.

The students learned, in fact, some technique to improve some key abilities for the professional and private life, they know that with work they can lose the worry to explain and to present complicated concepts in an other languages, and they have clear in mind that to

be competitive on the labor market they can never stop, but they have always to be ready to learn more.

The students are investing voluntarily three hours every Saturday and are really motivated, because they are improving their mother language and the abilities of writing, reading, listening and speaking. Very important is also that they learn specific words and concepts, as well as how to write a curriculum vitae and how to behave during an interview.

They reported that they can really use what they learn in the company and in their private life, and they discover again an interest for the politics, economy and life in Germany, Italy, Croatian, Turkey, and in Europe in general.

Zip.EuroCompetence finishes officially with a certificate in English, German and Italian, after an oral and writing exam, but this does not mean that the learning process will terminate.

The students learned to improve the key abilities for the professional and private life. They become aware that by learning they can lose the worry associated with explaining and presenting complicated concepts in other languages, and they in order to be competitive on the labor market they must never stop, but be always ready to learn more.

Statement II

The project ***zip.EuroCompetence*** addresses the disadvantaged young people with Italian, Croatian and/or Turkish speaking and/or migration background and the respective enterprises. The priority goal is promotion of job-related international competences. In a broader sense the project aims to contribute to formation of the future-oriented intercultural and international personnel development strategies, as well as strategies of cultural and international opening, particularly in the small and medium enterprises in Europe.

The specialised technical language and technical training, as well as short-term fellowships abroad allow the participants to widen and deepen their international (technical, linguistic and intercultural) job

market-oriented competences. The project is based on the resources and potentials of the participation, leading them to job market-ripe state, strengthening the biographic meaning and relevance of succeeding learning experiences, encouraging to actively face Lifelong Learning, while using various methods of self-controlled, non-formal and informal learning, offering specific learning control and examination procedures, a multilingual qualifying certification and contributing to sustainable intercultural opening strategies for the enterprises (SMEs) involved. The results of *zip.EuroCompetence* is, shortly:

- Improvement of the vocational qualification of approximately 75 young people with migration background.
- Networking of enterprises in Germany, Italy, Croatia and Turkey within the range of the vocational training and further training (Lifelong Learning).
- Recommendations on the internationalisation of vocational training and development of multilingual qualifying certification.
- Concepts of the resource-oriented promotion of young people with migration background.
- Concepts of the use of intercultural and international competences of the persons employed in enterprise (SME).

Statement regarding project managers zip.PE (Personalentwicklung)

The philosophy of Lifelong Learning is present throughout the entire organisation of the Stuttgart Youth Welfare Office. The project *zip.PE* is embedded therein. We are training through internal human resources development (seminars, workshops) the managers and the employees.

A goal is to develop intercultural competencies for the sustainability of our services rendered to the inhabitants of Stuttgart of widely international backgrounds. The participation is voluntary and all the planned training activities have been implemented.

To facilitate the exchange between different departments we are organising the Best-Practice rounds so that everyone can learn from the success of the others. Another important aspect is the optimisation of our recruitment processes. We want to remove barriers for appli-

cants with migrant background. Aspects addressed are: how can migrants become employees of the youth welfare office; which attitudes are present among the applicants towards diversity and intercultural competence.

At the same time the activities form a part of implementing the guidelines for the integration of migrants of the city of Stuttgart.

Statement regarding *Iris Konzepte*

Background:

Our target groups are:

- 1- Social enterprises employing project participants (e.g. long term unemployed people) with a high rate of those with migration background (especially from Turkey or from the former Soviet Union).
- 2- Responsible persons in the enterprises.
- 3- The project participants themselves.

The Lifelong Learning-discourse is important, because especially the persons with migration background often have skills and knowledge, which are not officially certificated. Examples are, e.g., competences in communication (speaking different languages), competences in managing cultural differences etc.

Our idea is to sensitise the persons responsible in the enterprises for these hidden competences, to develop them and – if possible – to use these in work life.

By this learning process the experience of employees, understood in a much broad sense, is brought to the surface. We hope to find and to develop the methods and procedures, which are useful to support the employees with migration background in their continuous learning process.

I t a l y

The VARCO Project *Valorizzazione, Adeguamento, Riconoscimento Delle Competenze degli Occupati (VARCO)* & San Giuseppe Moscati association

The VARCO project and the Lifelong Learning

The Italian PS VARCO represents a new opportunity in the field of learning for employment, with emphasis on Lifelong Learning. It will apply the following innovative actions:

- A new approach is therein implemented to training and guidance along with valuation, adjustment and recognition of skills acquired by workers ("skill fan") towards the employed subjects at risk of discrimination (women, disabled people, poorly educated over 45).
- The project includes also an integrated intervention model able to yield comprehensive responses to the multi-dimensional problem of change and Lifelong Learning ("innovation in the objectives").
- The project makes appear a new professional figure, such as the 'VARCO consultant', able to support firms and workers in identifying the mode of participation and the outcomes of learning ("innovation in the context").
- Then, the project involves new forms of institutional co-operation, such as the 'Equal Agreement', to create a public/private network among the PS members and further local parties in favor of Lifelong Learning and aimed at using learning as a tool to fight against discrimination and inequality in the working market.

Lifelong Learning in the knowledge society

Permanent formation has the objective of transmitting to the adult workers a functional knowledge, searching to promote competent communication skills within the perspective of enhancing the growth of knowledge and the importance of self-learning. Through this type of formation we can create the possibility of the diffusion of new technology of information, a growth in the demand for this formation

when people become adults with regard to the formation that they acquire in the pre-insertion phase of their working life, and a higher opportunity that the weaker groups will not be excluded from or marginalised at the work place.

Objectives: traditional formative instruction and the IT

Today, the context of formative courses changes, because now it has largely moved from the classroom to the internet. Traditional formative courses have been characterised by the amount of time spent on printed textbooks and by a hierarchical system that created what is known as *Before-During-After*. The timing on the internet is much faster, thus surpassing the traditional time span.

The new definition of learning is created through images that enhance the learning process. The internet has become the ideal environment for learning; The e-learning contract between professors and users assumes a new significance; communication and interaction are modified by the mediation of support technology.

The expectations of participants changes with respect to traditional methods of a classroom because the educator must acquire a new role and create a connection between the environment and users that are creating resistance in front of the virtual setting that is still very little familiar. The work is given to a tutor that assumes a significant role, because s/he must act as a guide for the participants in order to help them ease into the virtual environment, to be able to have access to all the formative activities such as chat-room and e-mail, they must have the ability to handle all the homework and the individual trials and of course they must administer the organisation of the formative process internally. Being knowledgeable of the organisation (referring to the cognitive knowledge of the organisational systems) helps to understand two significant problems in the formative process:

- a-Characterising particular information or knowledge that can determine certain work services that are efficient for individuals and groups in definite work situations.
 - b-Analysing the phenomena of learning under an organisational aspect that is related to daily situations of the work force.
-

The individual knowledge of resources for each single individual constitutes the major non-material resource for companies, and so the formative path and the cognitive re-elaboration of resources and work experience, enrich the value of each single worker.

The term of *continuous formation* ties in well with the incessant development of what is defined as professional competence.

Concentration of competence

McClelland (1973) and Spencer&Spencer (1993) have created a theoretical school, which postulates administrative systems for human resources today applied in all company sectors. The authors arrived at a definition of intrinsic competence of the individual with a prognostic value wherein variables are characterised such as *motivation, segments of personality, attitudes* and *ability*. In the academic and scientific world there has always been attention placed on organisation of human resources, concentrating more on the individual in the work place.

In Italy, Quaglino (1990) talks about quality and personal and professional aspects of individuals, underlining the subjective dimension and the psychological variables that influence company-related behavior. The fusion between the conception of competence, based on the attention placed on the individual, self confidence and perception of oneself, and the formation of the individual, enrich his knowledge to the point of better comprehension in a working context. Work is transformed and understood in a new light through intellectualization, which opens the path to a continuous formative intervention.

Formative courses must assume a catalysing aspect of learning that is diffused, and in emerging situations there is a demand for intervention in problem solving and a particular activation of resources to produce and activate new solutions.

The educator must promote a capacity to be agents for change in individuals, not through the already existing contents but with knowledge generated from personal experience. In the new formative model, new emerging resources, that have been rarely used, are called for, such as learning for intelligence fabrication, the capitalization

on know how and the recent as well as more distant experiences that happen during life.

If we put the traditional model together with a model that is based on different structures and methods, it may improve the above mentioned aspect, bringing us better results and dealing with larger populations. A quality jump from a psychological point of view may seem the result of an omnipotent dream that is as yet unrealizable, though it is in the focus of interest of the information technology field. And with time all demands will be answered.

Employment association S. Giuseppe Moscati

The non-profit S. Giuseppe Moscati ONLus was created in 1997 with its organisation including social, sanitary and educational assistance centres for Italian and foreign students from the papal universities in Rome.

The Association takes its inspiration from Giuseppe Moscati, who was sanctified by Pope John Paul II on the 25th October. As a doctor and a university lecturer, he joined science and faith. The non-profit Association S. Giuseppe Moscati has its own Centre for Preventive Medicine “John Paul II” as a prevention and assistance facility located in the Papal Gregorian University, and provides a prevention and guidance service.

The Association holds meetings and workshops in the field of prevention and social solidarity as well as training activities.

The Association S. Giuseppe Moscati, within the VARCO project is responsible for PS, and warrants the sustainability of the project in a social surrounding.

The S. GIUSEPPE MOSCATI association is involved in the VARCO project with the following interventions:

- 1) Testing-actively testing the models by a panel of experts inside the Equality pact.
- 2) Participation in the piloting committee.

- 3) Contribution to the monitoring of the quality of interventions based on efficiency.
- 4) Contribution to the experimentation with the instruments in terms of efficiency.

National partners in the VARCO Project

CONSERVZI LAZIO is the regional association of enterprises, organisations for public services in the region of Rome (Lazio / Latium).

Uil ROMA & LAZIO is the regional federation for Rome and Latium of trade unions that are members of UIL, one of the three largest workers union in Italy. The federation is strongly committed to the VARCO project since it holds the view that action to promote European growth requires the promotion of social justice and workers' rights and professional opportunities.

Objectives of the Project

The main objective of the VARCO project is the valorisation of human capital, based on continuous learning throughout one's life. The project is oriented towards the groups who, on the basis of sex, level of instruction, and age are usually excluded from the re-qualification processes and have a strong necessity to be integrated in the companies. The beneficiary groups are usually included in the Project in terms of assistance to the group in a classroom, the supervision-at-a-distance for a worker, provided on line through the help of the ICT. The methodology of the project foresees the transfer (individual dossier for transparency in learning) to companies, an instrument to create and sustain the political-cultural-technical conditions that place value on human labour by means of appropriate recognition of the acquired skills of workers. The presence of a VARCO consultant is meant to increase the competences of workers and to provide mediation between the company and the (potential) employees, as well as to transfer the information to the company.

Target groups

- Unskilled workers
-

- Over 45 years of age
- Disabled workers
- Marginalised women

Results

The formative objective of the VARCO project was to define a diverse instrument that is different from traditional ones for the appreciation of individual improvements.

Attention has been concentrated on weakly positioned workers or those that are at risk of being ostracised in the low education categories – handicapped, women, persons aged over 45.

The results are represented by innovation of change from process to project.

The true protagonists of the project are the participants (human resources managers and external participants) that need to acquire the necessary competences to realise the formative change needed to guarantee the total competences needed for the management of resources (individual dossier for the transparency of learning) inside the company that has participated in this new service.

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“RENOWATOR” Centre for SMEs Project

The primary objectives, organisation and content of the project

The Project is focused around the “RENOWATOR” Centre, which associates such functions as introduction into the IT and the “knowledge-based-economy” for the owners and managers of the SMEs and training in novel skills for the employees of the SMEs that run the risk of unemployment.

The primary objective is to improve, on the one hand, the capacities of the SMEs concerning both their competitiveness and the related capacity of maintaining or increasing employment, especially through introduction of the IT and associated knowledge (entailing, presumably, an increase of competitiveness), and on the other hand – the employability of the persons currently working within the SME sector, but encountering difficulties in terms of maintenance of their jobs or position on the job market.

The partners in the “RENOWATOR” project are: the Institute of Mathematical Machines (IMM), project originator and its administrator, the Systems Research Institute of the Polish Academy of Sciences (SRI PAS), the Academy of Human Resources Management in Warsaw (WSZP), the Women-on-Line company (KOL), Polish Chamber of Commerce (KIG), Top Multimedia (MSP) - publisher of the monthly “Journal of SMEs”, and the evaluating company Master Consulting (MC).

The division of work among partners can be sketched as follows: IMM has established and runs the centre “RENOWATOR” and is, at the same time, the source of content for the courses and the IT-related activities for the SME operators. SRI PAS is another, major, source of course content, WSZP acts as the third source of content, mainly dealing with “soft” skills. The KOL and KIG act as the partners responsible for course enrolment. Promotion and information are the duty of MSP journal, while MC is responsible for internal evaluation of the project activities.

The introduction to the IT and the “knowledge-based-economy” for the SME operators is done in a variety of manners, including meetings, devoted to particular subjects, short courses and packages. On the other hand, the main training activity is oriented at the SME employees, and encompasses around 15 various courses. These courses are given in the in-house, stationary form, as well as in a “blended” form, involving e-learning and stationary activities. The courses concern, on the one hand, the IT-oriented skills, including the ones dealing with e-learning, and on the other hand – the skills and specialisations related to modern management techniques and know-how. For all these courses the materials are prepared in the framework of the project in the traditional form of manuals and also, for the majority of them, in the form of e-learning courses.

Following the courses the participants can apply for, and get accepted, for the internships, mainly in either IMM or SRI PAS, or in an appropriately selected SME, where during the period of two or three months, they execute paid work, which is meant to bring them closer to practical knowledge of the practice of a given trade. The output from this work has often a form of a personal project, implementing the idea of empowerment, this project being of definite use for the given hosting establishment, but also for the beneficiary, at least in terms of the range of competences gained, if not direct further usefulness.

Some experience related to Lifelong Learning

As of this writing (June 2007) the project is more than halfway through. All of the various courses proposed in the framework of the project have been conducted at least once, including the “blended” ones, i.e. involving e-learning. Virtually all the materials for these courses have been elaborated and produced. The activities concerning the SME operators are well underway. The internship program is being carried out both at SRI PAS and at IMM, and the selected SMEs, with altogether more than 60 interns having participated in the program, and several of them currently engaged.

It can be proposed that the main thrust of the project activities is with its training and internship parts. This is true both with respect

to the direct impact and the accumulation of know-how and instruments for future activities. At the same time it is within these parts that interesting phenomena are observed, of importance for the broader perspective.

First, it turned out that the program-defined target group of the potential ultimate beneficiaries creates an important difficulty in recruiting the participants of the courses. Despite the fact that the courses are for free, and, in addition, the best-qualifying participants can apply for the internship, which is treated as a paid job, the specific definition of the target group makes the recruitment process quite not simple.

The conclusion, which can be drawn therefrom, is that the projects like this ought to have less stringent definitions of the scope of potential beneficiaries, resembling more the actual situation on the labour market rather than some thought-out scheme of a segment of it, which, through multiple limitations, is artificial vis a vis the differentiated and dynamic situation on the market (e.g. a person that may have been employed in an SME when declaring the wish of participating in a training, but may have changed this status when the training starts).

It is also a very consistent observation that the persons recruited are to a large extent not the ones in dramatic circumstances, but rather those, who are active and mobile enough to find out and decide to participate in the courses. This is, like in many other similar situations (see the observations from the German projects), highly correlated with the fact that they have already quite advanced education (very often university graduates). On the top of this, they are sufficiently motivated to undertake training on their own, while being employed, and this in virtually all cases without the knowledge of the employer.

The above points out, in the Polish case, to the low level of corporate responsibility level of the employers (or the conviction of the beneficiaries as to such a low level), and, at the same time, to the high level of personal motivation of at least a major portion of the beneficiaries.

In fact, instead of treating these beneficiaries as those “in danger”, one should look upon them as those “in search”, and this at the

border of new openings on the job market, even if some of their other characteristics would have them put “in danger” (age, nature of employment, gender).

The possibilities of replication and follow-up

Given the altogether successful realisation of the project objectives, owing mainly to the concept of offering new specialisations, which are of interest by themselves (job openings), and which may also, indirectly, enhance competitiveness and employment capacity of the downstream benefiting companies, it is worthwhile to look at the potential ways of making use of the experience from the project.

There seem to be three main pathways of potential replication or follow-up, each of which could be taken:

- Continuation of the activity of the centre, with emphasis on courses, their improvement, addition of new specialisations, etc., using the materials and know-how gathered.
- Dissemination of the accumulated know-how and materials as the basis for formation of similar centres, prepared and managed under the coaching and tutorship of the managers and trainers from the project.
- Broadening of the centre into a much more important activity, involving labour offices, employer associations, educational establishments, etc., oriented at new methods in management and learning (including e-learning).

In addition, the activity of the project leads to a number of important conclusions, like those forwarded in the previous section, which can form the basis of practice-oriented recommendations as to the active labour-enhancement and Lifelong Learning policies.

S l o v a k i a

Employment Institute

The Institute of Employment (EI) is a non-governmental non-profit organisation dealing with the study of the problems of employment.

EI collects information concerning labour market, with the objective of becoming a platform of information exchange. EI attempts to identify the characteristics of the Slovak labour market in terms of differentiation according to sex, age, qualification level, etc. EI attempts to solve the problems of active labour market policies, life-long learning, middle- and long-term strategies, and prognoses focused on regional differences in the respective characteristics.

Partners

Partners on the project are:

- Institute of Slovak and World Economy of the Slovak Academy of Sciences (SAV). SAV is the leading organisation in research and development in Slovakia, basically financed by the state, with additional resources coming from work on definite grants and projects.
- Labour Offices (LO) in Bratislava and Lučenec. Labour offices provide the link between the unemployed and the employers, and maintain the registers of the unemployed and the jobs available. LOs secure, as well, the mediation service within the active labour market policy (re-training and re-qualification, practice after school graduation, "activating" work). LOs are integrated with the social offices, in steering and distributing state support (welfare benefits) for the unemployed and people in social hardships. The financing of the LOs comes from the state budget and they are supervised by the Ministry of Labour, Social Affairs and Family.

Objectives

First objective of the project:

Creating regional prognoses concerning the labour market for the pilot regions. The prognoses will be based on the studies done by the Institute of Slovak and World Economy, and will be complemented with the information from the particular regions, elaborated in collaboration with the respective Labour Offices. The estimates of future trends will be calculated up till the year 2013. These prognoses should help in identifying the basic features decisive for the economic gap between the regions

Creating regional prognoses concerning the labour market for the pilot regions. The prognoses will be based on the studies done by the Institute of Slovak and World Economy, and will be complemented with the information from the particular regions, elaborated in collaboration with the respective Labour Offices. The estimates of future trends will be calculated up till the year 2013. These prognoses should help in identifying the basic features decisive for the economic gap between the regions of Bratislava and Lučenec. This knowledge will then be made use of in the second objective of the project – the expert system.

Second objective of the project:

Creating the manual and the automatic expert system for effective selection of activities in the framework of the active labour market policy. The goal is to increase the efficiency of the active market policy and justify the preference for them against the background of the less active methods. The expert system should integrate the regional prognoses, provided by SAV, information about the unemployed and the local labour market, collected at the LOs, and, last but not least, the expert advice of the specialists working at the LOs as consultants and advisors. The expert system puts together the information the information about the unemployed and about the present situation, as well as the future trend on the local labour market, and the expert knowledge enters this association of information as an important component. One of the results will be the best justified recommendation as to the selection of the retraining course needed in a particular cases or cases. In addition, the expert system should help the employees of the LOs to improve their work and make it easier.

Third objective of the project:

Supporting the development of the Employment Institute, which will process and update the manuals and the expert systems. It will also obtain other necessary data for creating updates of manuals with the help of colleagues working in the respective regions.

Employment Institute will continue in its work on creating regional prognoses and manuals also for other regions after project closure. The manual will be supported by the expert system, enabling for the search for the suitable active labour market policies (with special emphasis on re-training).

Target groups

The target group of the project are the unemployed in the regions of Bratislava and Lučenec, in general, with a special focus on the long-term unemployed.

The active labour market policies (re-qualification, re-training, and so on) are not as effective as they should be. Improvement of the support for and the effectiveness of the active labour market policies is the leading idea in this EQUAL project. We have selected two distinctly different regions in order to find the main differences in the labour market and the general economic situation, so that they can help us in identifying the causes for their appearance.

Activities

SAV is responsible for creating regional prognoses of labour market for the pilot regions of Bratislava and Lučenec. This activity is carried out by the team from SAV, which uses an econometric model of the Slovak economy for estimating future trends of numerous economic indicators, such a unemployment rate, GDP, value added, and so on.

EI develops the expert system (the software) for determining the activities within the active labour policies, based on the prognoses and the regional labour demand, as well as the incorporated expert knowledge. The expert system should be a helpful system instrument for communication between the departments of the LOs and a help for the junior LO staff, lacking adequate experience, in producing appropriate advice, consistent with the common opinions of the experts. There will be a need for many meetings meant to familiarise the team with the work of the LOs, especially the advisors.

Results

The goal of the project is to decrease the unemployment in the respective regions by making the active labour market policies more effective. Another aim is to improve the communication inside the LOs, so as to provide better and efficient links between the offer and the demand on the labour market.

Adaptability and possibility of transfer

If this pilot project is successful, the project team assumes the transfer of the methodology and the tools elaborated among the regions of Slovakia, by elaborating the respective regional prognoses and implementing the expert system.

Annex

*Translation of the Official Governmental Polish
Strategy Document of 2003*

Translation by Jan W. Owsinski, Warsaw, February 2006

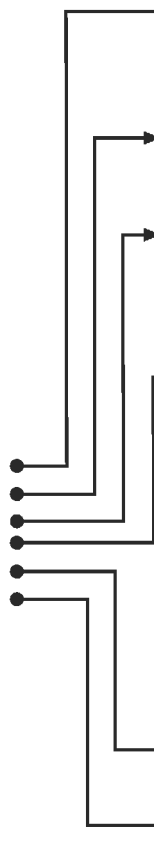
Strategy

Ministry for National Education and Sports

Strategy for the Development of Continuous Learning until 2010

Education is a race between civilisation and catastrophe, Herbert George Wells

Document adopted by the Council of Ministers on July 8th, 2003



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Introduction

A precondition for the realisation of the idea of building knowledge-based society is constituted in Poland by the assignment of an adequate rank to the commonly recommended in the recent years concept of Lifelong Learning.

The concept of Lifelong Learning (OECD – Paris 1996) encompasses the individual development and the development of social features in all their forms and all contexts, both in the formal and informal systems, that is – in the schools, trade training centres, universities and adult training centres, as well as in the framework of incidental learning, that is – at home, on the job, and in the society. **The concept emphasises the process of preparation and encouragement of all children to learn during all their life, starting with the early age. This concept directs the activities in such a way as to ensure adequate possibilities to all – adults, employees and jobless – who have to change or improve their skills.**

The contemporary idea of Lifelong Learning refers to the earlier concepts of permanent education. **Lifelong Learning** (UNESCO – Nairobi 1976) is a complex of educational processes, formal, informal and incidental, which, independently of their content, level and methods applied, enable complementing education in both intra- and extra-mural forms. Owing to this, adult persons develop their abilities, enrich and perfection their professional skills, or gain a new trade, changing their previous qualifications.

The law on the educational system (the design for a new law)¹⁰ defines permanent education as learning in the schools for adults, as well as acquisition and complementing of knowledge with the skills and professional qualifications in the extra-mural and non-scholarly forms by the persons, who are not encompassed by the schooling obligation.

The educational practice to date is dominated by **formal**¹¹ schooling, that is, the educational process leading from the kindergarten to the university. The changing labour market, new technologies, new trades and specialisations cause a gradual increase in significance of the **informal** education. Yet, the lowest weight is still being attached to the **incidental** education, which is the result of everyday human activity along with the action from the environment and the ever-present media.

Putting emphasis on the integration of the educational forms distinguished makes permanent education take on a new, holistic character. The complementary forms of the formal, informal and incidental learning – accounting for requirements of the professional qualifications – enable mutual pervading of the involved organisational structures in education, facilitate acquisition and certification of professional skills. Thereby, a platform for a wide exchange of experience in subject matter, methodology and organisation is formed. This is, as well, a step towards construction of an open and flexible education system, truly supportive for the cognitive and entrepreneurial activity, leading to increased chances of finding employment on the contemporary labour market.

¹⁰ The document dates from 2003 and was prepared by the former governmental administration. The fate of the design of the new law on education is not known to this author (note from JWV).

¹¹ **Formal education** – the educational system based on constant in time forms of schooling (classes, degrees, scores, schools, curricula and handbooks), leading from initial child schooling to the university, and including, side by side with the general education, the special programs and the institutions of stationary technical and trade teaching. **Informal education** – conscious and organised educational and

Lifelong Learning is the basic factor conditioning the sustainable economic growth, especially in the realities of the global economy. That is why the **primary objective of the present STRATEGY is to define the directions of development in permanent education in the context of the Lifelong Learning concept and construction of the knowledge-based society.** The document defining the directions of development of permanent education should constitute in the future the basis for coordination and monitoring of the changes taking place in Poland from the point of view of social expectations and realisation capacities.

Implementation of the STRATEGY should enable an individual development of every citizen through provision of wide access to permanent education and improvement of its quality, and to promote active attitudes, enhancing the chances of citizens on the labour market.

The Strategy indicates also the tasks for the governmental and self-governmental administration, as well as for the scientific and educational authorities and institutions, and the social partners, i.e. organisations of employers and employees, business and trade self-governments, associations and other NGOs. Realisation of these tasks would mean implementation, in Polish conditions, of the **European dimension of the Lifelong Learning** in the short and long time horizons.

This also means that the Strategy will become the basis for the development of the branch (sectoral) programs of deployment of permanent education with the purpose of systematic enhancement of professional qualifications of the staff for social economic needs.

1. Conditions for continuous learning in Poland

The STRATEGY is based on the diagnoses concerning the socio-economic and political processes, contained in the strategic governmental documents, such as the *Economic Program of the Government "Entrepreneurship-Development-Work"*, the *National Development Plan 2004-2006*, as well as in other medium- and longer-term documents of the central administration, including the *National Strategy of Employment Increase and the Development of Human Resources 2000-2006*, as well as the *Community Prerequisites for the Polish Employment Policy (JAP)*.

The most important conditions determining the objectives and the character of the Strategy include:

1. Demographic processes

Until quite recently Poland has been among the European countries featuring the highest natural increase indicators. During the last decade, however, the indicator has been systematically decreasing to reach in 2001 0,5 per 1000 inhabitants.¹² In the years 1990-2001 population number in productive age (18-59 years of age for women and 18-64 years for men) increased by almost 1,8 million, this being

upbringing activity conducted outside of the established formal schooling system, enabling a definite group of participants to reach the assumed goals of education. **Incidental education** – the non-organised and unsystematic, life-long process of acquisition by every human being of the knowledge, capacities and attitudes on the basis of everyday experience and the educational influences from the environment (see W. Okoń: *Słownik pedagogiczny (Pedagogical dictionary)*; in Polish; PWN, Warsaw, 1992).

¹² Later on, the indicator reached 0, and even dropped below it (JWO).

equivalent to increase from 57,5% to 61,9% of total population. Currently, for every 100 persons in productive age there are 62 persons in non-productive age, of whom 24 persons in post-productive age and 38 persons under 18 years of age.

The demographic tendencies indicate that:

1. Until 2005 the number of the young in kindergarten and school age will decrease by 1.150.000.
2. After an increase until 2004 the number of the young aspiring to university education will start to significantly decrease after 2005.
3. Until 2005 there will be an increase in the number of productive age population.
4. In the years 2002-2005 the population in retirement age will increase by 100.000, with the trend continuing for at least 30 years.

The demographic changes will exert a strong pressure on the labour market, and therefore will force the changes in the structure of demand and supply of educational services oriented at the constant improvement and raising of professional qualifications or change of specialisation by the adult persons.

2. Situation on the labour market

Situation on the labour market in Poland is determined by the phenomena associated with the increase of labour supply and decrease of labour demand. In the years 1999-2001 situation worsened, as expressed through decrease of employment and increase of the magnitude and intensity of unemployment. The employment indicator, calculated as the percentage share of population of the working population to the total in the age bracket of 15-64, determined in quarter IV of 2001 was at 52,7%¹³, two percentage points lower than in the preceding year. At the end of March 2003 the total employment in the national economy was estimated at 14,8 million, as compared to 15,1 in 2002 and 15,7 in 2001.

On the other hand, the number of the jobless amounted at the end of March 2003 to 3,3 million, equivalent to 18,7%. The year 2003 is the consecutive year, in which the cohorts born during the demographic high of the 1980s enter the labour market. The number of persons in the productive age may increase by 250.000 and only a part of them will find jobs. It is estimated that at the end of the year some 3,2 million persons will remain without jobs, and the unemployment rate will slightly exceed 18%.

Unemployment is very high among the young. In the years 1999-2001 the number of unemployed in the age group of 15-24 years increased by 155.000 (increase by 20%). Although the share of this group in the entire unemployed population decreased by 1,5 percentage points, the entire respective population grew by 22%, and still almost every third registered unemployed belongs to this age group. The second biggest age group among the unemployed is the one of 25-34 years.

¹³ The relatively low labour participation rate (or employment indicator) in Poland is largely due to the very early effective retirement age in Poland, one of the lowest, if not THE lowest in Europe (JWO).

In the years 1999-2001 their number increased by 213.300, and the percentage share grew by 0,4 percentage point.

The strongest increase of the number of unemployed in the years 1999-2001 was observed in the age bracket of 45-54 years. The number of the unemployed in this age group increased by 55,6% (by 204.700 persons), and the share in the total number of the jobless increased by 2,8 percentage points. These changes are associated with the demographic shifts in the labour force, but may also indicate the fact that persons from this age group feature lowered adaptation capacities with respect to the labour market.

The most endangered with joblessness are the relatively less educated persons. The dominating group of the unemployed have primary or basic trade education (close to 70% of all the unemployed). The least frequently unemployed are the persons with university education (in 2001 – slightly more than 3% of all the unemployed).¹⁴

These data indicate that education can constitute a protection against work-related exclusion. They also mean that side by side with the programs aimed at helping the unemployed in finding the way back to employment very high importance should be attached to the long-term activities meant to improve the education of the society.

3. The educational system

During the 1990s, along with the increasing educational aspirations, the structure and the level of education of the Polish society improved significantly. Such a tendency brings Poland closer to the countries of the EU and puts Poland in the leading group among the candidate countries. The increase of the numbers of schools, pupils and students has not been accompanied, though, by an adequate increase in financial outlays. The scale of expenditures in relation to the GDP, although comparable with any countries of the EU, does not guarantee maintenance over a longer time period of a high rate of development, that would bring our educational system closer to the patterns characteristic the most developed countries. Public expenditures into education and upbringing in 2001 amounted to 4,6% of the GDP (in the preceding year – 4,4%, and in 1995 – 4,14%). For comparison, in the OECD countries the mean of public expenditures into education in 1998 amounted to 3,28% of GDP.

Yet, the expenditures into education, according to the education levels, per one person taught, expressed in USD, show a significant distance, which separates Poland not only from the EU countries, but also from the neighbouring ones. Thus, in 1999, expenditures per one pupil of the primary school on the average in the UE were at 4.100 USD, while in Poland – 1.900 USD, and in Hungary – 2.200 USD. The expenditures per one pupil of the secondary school in the UE were at 6.200 USD, in Poland – at 1.600 USD, and in Czechia – 3.400 USD. At the university level

¹⁴ *These numbers are, definitely, misleading, the more proper ones reflecting rather the shares of the unemployed in the respective education level classes of the population. This kind of statistic does not provide such a sharp vision of decrease of joblessness along with the educational level (JWO).*

the indicator for EU was 8.500 USD, in Poland – 3.900 USD, and in Hungary – 5.900 USD.¹⁵

An additional indicator, showing our educational delay, is the low level of use of ICT in education. In Poland, there are 44 pupils of primary schools and 22,6 pupils of secondary schools per one computer. For the countries of the EU these numbers are, respectively, 13,2 and 8,6. With respect to one computer with internet access the same indicators for Poland are 79 and 26,1, while for the EU – 32,0 and 14,9 (data as of 2002 for Poland and as of 2001 for the EU).

The expenditures on education and enhancement of skills of adults are also too low. It is estimated that the budget expenditures on permanent education in Poland account for 0,6% of the total of expenditures on education. The employers spent on education, training and specialisation change of the staff in 2001 some 0,8% of the total labour cost.

The number of persons improving their education in Poland on the average in a year during the recent period has been 1,2-1,5 million, that is – between 8% and 10% of the total employment in the economy. For comparison, this form of enhancement of the possibility of being employed is made use of in the UE by roughly 20% of the employed persons. Further, it is estimated that every employee devotes to schooling in an organised fashion [in Poland] on the average 2 hours per annum, while in the developed countries this time amounts to approximately 50-70 hours in a year.

In the opinion of the Governmental Centre for Strategic Studies social differentiation in terms of access to education observed in Poland is among the highest in Europe. The access of the children and the young to education depends in an increasing manner upon the material and financial status of parents. In this situation, undertakings ought to be realised aiming at prevention of the threats arising. In the perspective of Polish membership in the EU it is necessary to amplify the efforts aiming at securing of the high level of education, facilitating access to education and improving the educational indicators. These objectives are conform with the priorities of the EU member countries.

Side by side with the here described conditions for the implementation of the Strategy, other factors to be accounted for include:

1. The scientific and technological progress, which changes work environment and content; this encompasses the onset of virtual reality, intellectualisation of work, and change of the character of employment.
2. Integration and globalisation, widening human cultural horizons, offering broader possibilities of individual choice and development, and at the same time bringing in uncertainty, acceleration that cannot be matched, feeling of being lost, as well as marginalisation of individuals and of entire social groups.

¹⁵ Again, this statistical account – and the one, which follows, along with the respective conclusions – is rendered highly doubtful by a unique phenomenon, having arisen in Poland, namely mass development of non-public educational sector (especially on the secondary and tertiary levels) and of the paid extramural studies. While low per-student public expenditures can be explained by low (official) GDP numbers (lower also than in Hungary and Czechia), the data on public expenditure account only for a part of paid

3. Raising educational aspirations of the society, expressed through increased share of the young frequenting the general secondary schools and the increase, by several times over, of the number of students in the public and non-public higher education establishments during the last decade.

The Strategy accounts also for the stipulations contained in the international documents, such as *Memorandum on permanent education* (Brussels, 30 October 2000), and *Copenhagen Declaration* - Declaration of the European Ministers for Professional Education and Training and of the European Commission, agreed upon in Copenhagen on 29-30 November 2002 on the enhanced European collaboration in the domain of professional education and training.

2. Strategic objectives of developing continuous learning

The **strategic objective** of development of the permanent education process and the Lifelong Learning is to support and direct the development of personality, to stimulate human innovativeness and creativity. This will be conducive to the increase of competitiveness, improvement of work organisation, and establishment of foundations for the development of the knowledge-based society. Such orientation is conform to the policy of the European Union, directed towards the active participation in a civic society, personal fulfilment, adaptation to constant change and enabling getting a job.

Attainment of the strategic objective is based upon the identified priority actions, corresponding to the European Lifelong education domain:

1. Increasing accessibility of continuous learning.
2. Improving quality of continuous learning.
3. Collaboration and partnership.
4. Increase of investment in human resources.
5. Establishment of information resources in the area of permanent education and the development of consulting services.
6. Raising the awareness as to the role and significance of permanent education.

3. Priority actions

Priority 1. Increasing accessibility of continuous learning

An effective system of continuous education makes it possible for every citizen to satisfy the aspirations and personal educational needs in the optimum conditions, irrespective of age, gender, family circumstances, degree of impairment, location of residence, social and material status, education to date and ethnicity.

Therefrom the need of developing a more user friendly system of access to various levels, forms and methods of knowledge acquisition and skill enhancement. This

costs, and also not for the entire population encompassed by educational service. Thus, in particular, in the years 1990-2000 the number of university level school students in Poland increased, both in absolute and in relative terms, several times over (at least five times!). This increase took place largely owing to the paid sector of university studies (the non-public and the paid extra-mural studies at public universities). So, the true numbers in terms of social expenditures on education are definitely higher. At the same time,

system ought to feature the following characteristics: openness, diversity, accessibility, comparability, clarity, and mutual recognition of qualifications.

In this context it is purposeful to:

- Increase the access to information on education and training.
- Ensure diversity of the educational offer.
- Remove the social and psychological barriers in access to education.
- Establish the mechanisms ensuring openness of educational pathways.
- Create conditions for the development of new forms of education, accounting for the IT (distant learning, including e-learning).
- Create conditions conducive to raising of professional skills of persons employed in particular sectors of national economy.
- Optimise the network of institutions conducting educational activity for the purpose of facilitation of a convenient, direct access to educational service, through engagement of the centres that the local and regional authorities dispose of, as well as organisations and associations linked with local environment.
- Monitor the changes in accessibility and diversity of various educational offers in permanent education.

No.	Task	Units carrying out (main responsibility and collaboration)*	Time of realisation	Source of finance
1	Elaboration of the diagnosis of the state of permanent education in Poland (formal and informal system)	MEU, collaboration: ministers – for labour and science, scientific institutions	2004	State budget
2	Establishment of sectoral (branch) programs enabling acquisition and improvement of professional skills needed on the labour market	Respective ministers, collaboration – branch associations	Continuous work	State budget, budgets of the respective ministers
3	Elaboration of the legal foundations ensuring open passage between school and non-school education	MEU	2003-2004	State budget
4	Establishment of the network and equipping the all-accessible sites for distant learning, including e-learning	Units of territorial self-government, collaboration: ministers for education and upbringing, labour, science	2004-2007	State budget, own revenues of the territorial self-government units

a very distinct, statistically well-confirmed distinction takes place: the paid studies are undertaken (and paid for) by the poorer than the tuition-free studies at public universities (JWO).

* Here and further on MEU denotes the Minister proper for education and upbringing.

No.	Task	Units carrying out (main responsibility and collaboration)	Time of realisation	Source of finance
5	Elaboration and implementation of local programs for removal of barriers to access to education, with special care for the handicapped and bringing the permanent education closer to the place of residence	Units of territorial self-government; collaboration: employer organisations and other social partners, educational institutions	2004-2010	State budget, structural funds, own revenues of territorial self-government units, employers' means
6	Systematic monitoring of changes in diversity of and accessibility to the educational offer	MEU	Periodically	State budget

Priority 2. Enhancing the quality of continuous learning

An important element of the transformation, taking place in Poland, is to secure common access to high quality goods produced and services provided, this being a precondition for matching the competition on the European and global scale.

Education is also subject to such rules, with the basic customer being the pupil, the student, the learning person, who expect high quality service. The provider of educational service should satisfy the respective expectations and needs.

In this context it is purposeful to:

- Improve the skills of the teaching staff, including skills allowing for realisation of the life-long-learning concept.
- Systematically update the curricula of schooling and adapt them to the socio-economic needs and individual expectations.
- Popularise information technologies and technological culture, teaching of foreign languages, formation of basic competences, enterprising attitudes and the principles of functioning in the society, also among the adults.
- Introduce innovative methods of teaching and learning, including the use of modern tele-information technologies.
- Popularise the didactic means enhancing the effectiveness of education and stimulating the development of interest of the learning persons.
- Develop the system of examining, certifying and recognising the skills acquired through school and non-school forms, as well as informal education, including self-learning and experience gained on the job.
- Establish the standards of professional qualifications as one of the elements securing quality in permanent education process.

- Introduce educational standards (curriculum, basis, staffing) resulting from the professional standards.
- Create the system of accreditation of the institutions involved in permanent education in extra-mural forms, with the assumption of freewill submission to the accreditation procedure.
- Strengthen the effectiveness of pedagogical supervision over the educational units conducting permanent education.
- Conduct research serving to improve the quality of permanent education.

No.	Task	Units carrying out (<i>main responsibility and collaboration</i>)	Time of realisation	Source of finance
1	Elaboration and implementation of programs for improvement of teaching staff for various forms of permanent education, including adult education	MEU; collaboration: educational institutions	2003-2006	State budget, structural funds, own revenues of territorial self-government units
2	Popularisation of programs for adults, complementing their basic skills (foreign languages, IT, technological culture, entrepreneurship), increasing their chances on the labour market	MEU; collaboration: ministers for economy, territorial self-government units, educational institutions, employer organisations, other social partners	Continuous work	State budget, own revenues of territorial self-government units
3	Modification and enrichment of the program offer of permanent education with particular emphasis on modular programs	MEU, collaboration: respective ministers (including labour), educational institutions, scientific institutions	Continuous work	State budget, structural funds
4	Establishment of the bank of modular programs for intra- and extra-mural forms	MEU, collaboration: respective ministers (including labour)	2004-2005	State budget
5	Continuation of the program of equipping schools and other units with computer facilities	MEU, collaboration: territorial self-government units	Continuous work	State budget, structural funds, own revenues of territorial self-governmental units
6	Equipping schools and units conducting trade schooling (including centres for practical training and permanent education centres) with technical didactic facilities	MEU; collaboration: territorial self-government units, employer organisations, other social partners	2004-2010	State budget, structural funds, own revenues of territorial self-governmental units

No.	Task	Units carrying out (main responsibility and collaboration)	Time of realisation	Source of finance
7	Developing a concept for the Polish model of distant learning	MEU	2004	State budget
8	Preparing programs and didactic framework for distant learning, including e-learning	MEU; collaboration: respective ministers (including labour), scientific and educational institutions	2004-2006	State budget, structural funds
9	Monitoring implementation of distant learning	MEU; collaboration: respective ministers (including labour)	2005-2006	State budget, structural funds
10	Developing institutional framework of accreditation for education in extramural forms	MEU; collaboration: education supervisors, respective ministers (including labour)	2004-2006	State budget, structural funds
11	Preparation of staff for the accreditation system	MEU and other respective ministers	2004- continuous work	State budget, structural funds
12	Monitoring implementation of the accreditation system	MEU; collaboration: scientific institutions	2005-2006	State budget, structural funds
13	Elaborating and implementing integrated procedures and methods for evaluating the results of education – system of verification of qualifications in formal and informal education	MEU; collaboration: respective ministers (including labour), Examination Committees, employer organisations and other social partners	2005-2008	State budget, structural funds
14	Developing and modifying the standards of professional qualifications for professions with definite classifications	Ministers for economy and labour; collaboration: MEU, other respective ministers, employer organisations, other social partners, scientific institutions	Continuous work	State budget
15	Establishment of legal bases for functioning of professional qualification standards	Ministers for economy and labour; collaboration: MEU, other respective ministers	2005	State budget
16	Starting work on development of educational standards based	MEU; collaboration: scientific institutions	2005 - continuous work	State budget, structural funds

No.	Task	Units carrying out (main responsibility and collaboration)	Time of realisation	Source of finance
16	on professional qualification standards, conducive to improvement of the teaching process quality			
17	Perfecting legal solutions and the competence of the staff of educational supervision over the permanent education units	MEU	Continuous work	State budget
18	Conduct of research serving the improvement of quality of permanent education	MEU; collaboration; minister for science, scientific institutions	2004-2006	State budget

Priority 3. Collaboration and partnership

Solving problems of permanent education will not be possible without collaboration and partnership, and thus – coordination of activities aiming at realisation of Life-long-Learning. Permanent education is a national priority, and so the problems arising are common problems, while the advantages achieved constitute common good. Hence, creation of the solutions and instruments of realisation ought to involve a range of agents, including governmental administration, self-governmental administration, scientific and educational institutions, as well as social partners irrespective of their scope of activity (country-wide, regional, local community, single institution). At the same time, this is an opportunity for maintaining social links and thus strengthening of democracy. Of special importance is inclusion of employers in the process of permanent education. Employers do increasingly frequently notice that the effectiveness and competitiveness of functioning of their companies depends upon the knowledge and skills of their employees.

In this context it is purposeful to:

- Increase the involvement of the state, self-governmental organs, employer organisations and other social partners in the conduct of common policy in the domain of programming, organising and financing of permanent education.
- Increase the input of the local authorities in creation of transformations on the labour market and adaptation of educational undertakings to local needs.
- Involve research and educational communities in the process of permanent education, with special emphasis on distant education, as well as collaboration with respective communities and institutions in other countries (bilateral and other international) and in the EU.

No.	Task	Units carrying out (main responsibility and collaboration)	Time of realisation	Source of finance
1	Elaboration of mechanisms and instruments of realisation, defining joint action of the state, self-governmental authorities and social partners in developing permanent education	MEU; collaboration: minister for labour, other respective ministers, territorial self government units, employer organisations and other social partners	2004-2005	State budget
2	Development of local strategies and of social dialogue for permanent education	Territorial self-government units; collaboration: employer organisations and other social partners	2004– continuous work	Own revenues of territorial self-government units
3	Promotion of collaboration of the scholarly communities and educational associations in the domain of permanent education	MEU; collaboration: other respective ministers, scholarly and educational institutions	Continuous work	State budget

Priority 4. Increase of investment in human resources

The current level of investing in human resources can be considered too low to satisfy the demand for skills that the market lacks. Labour market situation and high unemployment cause that more and more people are interested in increasing their skills. The currently functioning mechanisms of financing the development of human resources are not matching the social needs and expectations. A barrier to undertaking of education is often constituted by low material status of the individuals and poor economic condition of the companies.

In this context it is purposeful to:

- Establish a system of motivations to stimulate undertaking of permanent education, with particular consideration of the inhabitants of rural areas, areas of structural unemployment, persons threatened with social exclusion.
- Create effective legal and organisational solutions, establishing conditions for the increased participation of the employers in permanent education of employees.
- Improve management in the system of permanent education, increasing the effectiveness of investing into human capital.
- Continue the already functioning programs, which, through the intermediary of the system of information and training facilitate taking up of jobs or self-employment, like the "First job" program.
- Develop investigations into the effectiveness of investing into human resources.

No.	Task	Units carrying out (main responsibility and collaboration)	Time of realisation	Source of finance
1	Creation of the system of motivations to stimulate undertaking of permanent education, with particular consideration of the inhabitants of rural areas, areas of structural unemployment, persons threatened with social exclusion	MEU; collaboration: minister for labour, other respective ministers, employer organisations and other social partners	2004-2006	State budget, employers' means
2	Elaboration of legal bases enabling effective organisation of permanent education, accounting for sources and mechanisms and financing	MEU; collaboration: respective ministers (including labour and public finance), employer organisations and other social partners	2004	State budget
3	Development by the employers of short- and medium-term plans of employee skill improvement (time, financial means), accounting for individual predispositions of the employees and the company	Employer organisations, employers	2004 – continuous work	Employers' means, private means
4	Continuation, development and popularisation of the already existing programs, which, through the system of information and training facilitate taking up of jobs or self-employment	Minister for labour; collaboration; MEU, employer organisations and other social partners	Continuous work	State budget, employers' means
5	Conduct of studies enabling evaluation of effectiveness of investing into human capital	MEU, ministers for labour and science	2004-2007	State budget

Priority 5. Establishment of information resources in the domain of continuous learning and the development of consulting services

Key role in the choice of profession, facilitation of access to education, as well as motivation of the potential candidates to permanent education is played by information, advising and consulting.

Planning of the educational and professional career path – in accordance to the stages of human life – should be supported by schools and educational units, as

well as information and professional counselling centres, providing service encompassing: identification of natural predispositions, indication of the possible educational paths, information on professions and qualification requirements, including the possibilities of re-training for trade change, information on the situation and forecasts of the labour market, as well as advice to companies and organisations searching for an adequate educational offer.

The collaboration between the institutions dealing with counselling and consulting, such as psychological-pedagogical assistance centres, labour offices, job agencies, head-hunting firms, job clubs and exchanges, career and job brokerage bureaux, and the like, should facilitate access to reliable information on the possibility of planning education with the use of various forms of permanent education.

In this context it is purposeful to:

- Guarantee commonly and constantly accessible service encompassing educational-professional advising, oriented at a broad audience at each stage of life and professional career, adapted to the needs and requirements of the customers.
- Establish commonly accessible information banks on permanent education (network of institutions, scope of their activity, information on the possibility of employment) with the use of studies of public statistics.
- Strengthen connections between the systems of professional counselling and advice provided in the scholarly system and the employment services.
- Develop professional advising and counselling in schools, permanent education units, and employment services.
- Create conditions for collaboration between private and public institutions in the domain of professional advising as well as exchange of information and materials in the frameworks of the developing national and European partnership networks.
- Elaborate and popularise forecasts concerning labour market and demand for labour.

No.	Task	Units carrying out (main responsibility and collaboration)	Time of realisation	Source of finance
1	Creation of computer-based data bases and information systems accessible for various groups of customers	Respective ministers	2004-2006	State budget, structural funds
2	Improvement of public statistic systems in the domain of participation in permanent education and educational services provided	Central Statistical Office; collaboration: MEU, minister for labour	Continuous work	State budget

No.	Task	Units carrying out (main responsibility and collaboration)	Time of realisation	Source of finance
3	Creation and dissemination of materials for various groups of users (pupils, teachers, unemployed, adults, advisors)	MEU, minister for labour, other respective ministers, producers and publishers of multi-media, territorial self-governmental units	Continuous work	State budget, structural funds, own revenues of territorial self-governmental units
4	Preparation of job advisors for educational system and labour market	MEU, minister for labour; collaboration: other respective ministers, scholarly and educational institutions	2004-2006	State budget, structural funds
5	Elaboration and popularisation of forecasts concerning labour market and demand for labour	Governmental Centre for Strategic Studies; collaboration: MEU, minister for labour, other respective ministers	Continuous work	State budget
6	Popularisation and dissemination of information on labour market for use in permanent education	Respective ministers; collaboration: educational supervisors, territorial self-governmental units	Continuous work	State budget
7	Broadening of the information basis of the National Centre of Advising Resources	MEU, minister for labour	Continuous work	State budget

Priority 6. Raising the awareness of the role and significance of continuous learning

Formation of the attitudes conducive to Lifelong Learning requires systematic action, starting from early school education. One of the essential tasks consists in raising the pupils' awareness that the knowledge and skills acquired in the course of formal education (in the scholarly system) constitute merely the basis for permanent learning. Already now school is not the sole place of acquiring knowledge, but to an increasing degree an institution teaching how to learn. This tendency will get strengthened. It also becomes a strategic goal to make people aware of the role and significance of permanent education – both in individual and social dimensions. Broadly understood development of learning culture, based on general ethics and culture, will be conducive to the increase of the value of and motivation to learning, multi-aspect development of personality, formation of civic attitudes and social cohesion.

In this context it is purposeful to:

- Promote the value of learning at all stages and in all educational forms.

- Undertake information and promotion activities presenting the individual and collective advantages resulting from permanent education, including the connection with the increased chances on the local, regional, national and European labour markets.
- Promoting and popularising the examples of “good practice” arising on the national and European grounds.
- Involvement of the media in popularising the idea of Lifelong Learning.
- Promoting the role of advising in the choice of a proper path of educational development and professional development.
- Engaging local authorities, schools, universities, employers, employment services, NGOs and other social partners in promotion of programs of permanent education.
- Monitoring the implementation of strategy of development of permanent education.

No.	Task	Units carrying out (<i>main responsibility and collaboration</i>)	Time of realisation	Source of finance
1	Emphasising in the curricula the goals and tasks aimed at formation of skills and attitudes conducive to Lifelong Learning	MEU	Continuous work	State budget
2	Popularisation of programs of teacher training in the domain of andragogics	MEU; collaboration: research and educational institutions	2003 - continuous work	State budget, own revenues of territorial self-governmental units
3	Promotion of “good practice” in the domain of permanent education (Polish and European examples)	MEU, other respective ministers (including labour); collaboration: media, territorial self-governmental units, social partners	Continuous work	State budget, own revenues of territorial self-governmental units, means of social partners
4	Elaboration of programs promoting the idea of Lifelong Learning	MEU; collaboration: the media	2004-2006	State budget
5	Promotion and awareness raising of the advantages from orientation	MEU, minister for labour, the media, labour offices	Continuous work	State budget

No.	Task	Units carrying out (main responsibility and collaboration)	Time of realisation	Source of finance
6	Development of programs promoting the idea of permanent education, realised on a local level	Territorial self-government units, employer organisations, other social partners	Continuous work	Own revenues of territorial self-governmental units, means of employers and other social partners
7	Monitoring of realisation of tasks resulting from the Strategy	MEU; collaboration: research institutions	Periodically	State budget

4. Possibilities of financing the implementation of Strategy

Given lack of detailed data on the volume of financing of permanent education in Poland, the financial forecast will be based on estimates, originating from various expert assessments. Thus, conform to the estimates, adult education in Poland accounts for roughly 0,6% of total expenditures on education¹⁶. In 2001 total expenditures on education (scholarly system and universities) amounted to 30.549.816 PLN, meaning that some 183 million PLN were spent on adult education.

In the framework of the Sectoral Operational Program "Development of Human Resources" (DHR), co-financed from the European Social Fund (ESF), the Ministry of Education and Science will dispose in the years 2004-2006 of the means equivalent to 527,40 million EUR. Of these, 395,55 million EUR shall originate from the ESF, and 131,85 million EUR will constitute the national public contribution. These means will be devoted to realisation of the first two activities from [DHR] Priority 2 – Towards the knowledge-based society. Thus, on the average, in one year, approximately 175,8 million EUR will be at disposal (of which 43,95 million EUR from the national public contribution).

Analysis of stipulations from the DHR Program and the Strategy of Development of Permanent Education until 2010 indicate that the tasks formulated in these two documents are compatible, meaning that the majority of tasks of the Strategy may be financed from the means of the DHR Sectoral Operational Program.

This is not to say that these are all the means that can be used for purposes of developing permanent education. There are other activities in the DHR Program, as well as in the Integrated Operational Program of Regional Development and other operational programs, like "Restructuring and modernisation of the food sector and development of rural areas", that contain the tasks associated with permanent education, and so it will be possible to acquire or use additional financial means therefrom.

¹⁶ See, however, footnote 6 before for at least one source of the wide gap in the data (JWO).

Public expenditures can be borne in the volumes established in the budget law, and so the concrete financial means for realisation of tasks, mentioned in the Strategy, will depend on the capacities of the state budget and the decision of the Parliament in the successive years. Besides, it should be noted that many of the tasks listed in the Strategy will be continued, and so their realisation would not require additional means from the state budget, since they may be financed from the budgetary apportionment of the respective disposers. The volume of financial means, disbursed by the territorial self-governmental units for realisation of tasks resulting from the Strategy will depend upon the budgetary capacities of these units.

In planning the financing of permanent education development one should also account for the expenditures of employers for the purpose in question, indicated in the labour cost statistics. In 2001 the expenditures on skill enhancement, upgrading and change in private sector amounted to 0,8% of labour cost. Little is known of the contribution of individual persons in covering the costs of professional training: it is estimated that 39% of the adult participants of training programs finance learning themselves.

Hence, considering the above, the volume of total outlays on permanent education, assuming effective use of financial means originating from the sources mentioned, could be significantly higher, and, in particular, with respect to the budget on adult education, the increase may even reach the level of 2,5% in comparison with the current indicator value of 0,6%.

After 2006 the Strategy will be financed in a similar manner, with the tasks contained in the consecutive sectoral operational programs formulated on the basis of those forwarded in the present document.

Assuming that the activities contained in the document "Strategy of Development of Continuous Learning until 2010" will get appropriately prolonged, it will become possible to elaborate on this basis a long-term strategy, accounting for the possibility of acquiring financial means from structural funds in the consecutive budgetary periods of the European Union.

5. Annex: Continuous learning in national and international documents

Constitution of the Republic of Poland:

Article 65, item 5. Public authorities conduct the policy aiming at full, productive employment through realisation of programs to fight unemployment, including organisation of and support for the professional advising and training, as well as public and intervention works.

National Development Plan for 2004-2006: Sectoral Operational program of Development of Human Resources

Priority 2 – Development of knowledge based society. Its objective is to prepare the society to function in the system of global market economy. Raising the level of its education is associated with the increase of the number of participants and employees of permanent education, equalisation of educational chances of different social groups and adaptation of the educational offer of schools and raising the level of the permanent education, as well as optimisation of systemic solutions in this area and the development of social dialogue. Realisation of this priority assumes also the development of entrepreneurship and of the adaptation potential of the existing companies, especially in the sectors utilising advanced technologies, including information technologies, and enhancement of their competitiveness.

Activity 1 - Adaptation of the educational offer of schools, universities and trade schooling units to labour market needs consists in equalisation of educational opportunities and access to the labour market, provision of education for the needs of information society, professional consulting and advising, enhancement of quality of education and development of education forms, as well as professional enhancement for teachers and university lecturers.

Activity 2 - Strengthening the system of permanent education for adults consists in accrediting institutions conducting permanent education in extra-mural form, developing distant education in the framework of social education.

Activity 3 - Development of the personnel for modern economy and entrepreneurship consists in improvement of the skills and qualifications of the managing staff and employees of companies, especially the innovative ones, initiation and strengthening of collaboration between the world of science and education and the economy, facilitation of introduction of the new employment forms and new organisational forms, as well as shaping of enterprising attitudes, supporting entrepreneurship and job creation through, for instance, assistance to persons wishing to undertake independent businesses.

Other Sectoral Operational Programs and the Integrated Operational Program of Regional Development in the domain of education

National Strategy of Employment Increase and Development of Human Resources in 2000-2006

This Strategy is a continuation of the intentions having been fulfilled in the framework of the earlier governmental programs concerning the labour market, but it contains also new proposals of activities, among which one of the crucial proposals is to create appropriate conditions for the functioning and formation of a flexible and effective model of permanent education.

Strategy of Computerisation of Poland – ePoland

Objective C – Common capacity of using tele-informatics

- C1 - Common skill of using computers - bringing about the situation, in which every high school graduate can use computers and knows the advantages from using internet.
- C2 - Preventing IT exclusion - ensuring technical capacity of equalising the chances of full participation in information society through additional training for the "middle generation" and the handicapped, with the use of e-learning methods, promotion of teleworking as the method of professional activation.
- C3 - Enhancing the computer-oriented professional readiness - supporting computer training for adults, with special account of the unemployed.

Joint Assessment of the Polish Employment Policy (JAP)

Polish government and the European Commission (Directorate General for Employment and Social Affairs) carried out joint assessment of the short-term priorities of the Polish employment policy and the labour market. The list of main priorities was established, which, in particular, includes:

- Continuation of the **educational reform** and attainment of the associated objectives of increasing general educational level of the adult population.
- Development of **permanent education** in the framework of a consistent system and with involvement of social partners.

Realisation of these priorities will require undertaking of further activities concerning:

A. Continuation of the educational reform, including:

- Preparation for the start-up on September 1st, 2004, of the two-year complementing lyceums and three-year complementing technical high schools.
- Development of distant learning.
- Preparation of examination standards as well as structures and the staff for carrying out external examinations confirming professional qualifications.
- Implementation of legal bases for carrying out accreditation of the units conducting education in extra-mural forms.
- Perfecting the principles of functioning of the permanent, practical, complementing and professional education units.
- Perfecting the principles of acquiring and enhancing the general and professional education by adults.

B. Improvement of the training system for adults:

- Perfecting the statistics of continuous education.

- Elaboration and popularisation of professional qualification standards.
- Elaboration and popularisation of modern training curricula.
- Perfecting the motivations for investing in the development of qualifications.

C. Continuation of the social dialogue in the domain of permanent education of adult persons

Memorandum concerning permanent education – European Commission, Brussels, 30 October 2000

“In the knowledge-based society a lot depends upon people themselves. Most important is the human capacity of effective and reasonable production and of using goods in the face of constant change. In order to fully develop this capacity people ought to want to be able to take their lives in their own hands – shortly, to become active citizens. Life-long education and training are the best way to face the challenges brought by the changes.”

Copenhagen Declaration - Declaration of the European Ministers for Professional Training and the European Commission, agreed upon in Copenhagen on 29-30 November 2002, on increased European collaboration in the domain of professional training:

“The permanent education and mobility strategies have the essential significance for promoting increased employment, active citizenship, preventing social marginalisation and personal development. The primary challenge for the European systems of professional education and training and for all those interested is to establish knowledge-based Europe and to ensure common access to the market. A challenge is also constituted by the necessity of constant adaptation of the systems mentioned to the advance and the changing social needs.

It is particularly important that the countries joining the Union be treated from the very start as partners in the future collaboration in the domain of education and training at the European level.”

Aide Memoire – World Bank – November 2002:

“As Poland enters the European Union, it cannot overlook the issue of access to an adequate, fulfilling citizens’ expectations, system of permanent education service, meant to secure for the school graduates and the adults the needed training or skill and knowledge raising access to information, enhancement of innovation capacities, as well as acquisition of broad knowledge and capacities necessary for employment on such jobs that require an adequate level of knowledge. Besides, the highly qualified and trained staff is the factor improving labour productivity and enhancing competitiveness, establishing thereby the appropriate basis for innovation. That is why creation of policies

and implementation of programs, which would satisfy needs in the domain of formation of the particular knowledge-based societies, should be assigned the highest priority. The policy concerning realisation of the concept of Lifelong Learning should not only satisfy the needs of the young, learning in schools, but also of the adults, who have to improve their skills and change their qualifications on various stages of their life.”

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Lifelong Learning

