



SKILLS DEVELOPMENT FOR POVERTY REDUCTION IN TRANSITION COUNTRIES: PROGRAMME AND STRUCTURE OF THE WORKSHOP

Documents:

- 1. Skills development for poverty reduction in transition countries***
- 2. Skills learning for pro-poor development: Some current areas of international innovation***
- 3. Labour markets and disadvantaged groups in the Western Balkans: Opportunities for skills development and enhancement***
- 4. From poverty reduction to economic and social cohesion: How can countries be better prepared for ESF type instruments?***
- 5. Skills development for poverty reduction and vocational education and training system reform in Central Asia***
- 6. Peer reviews and peer learning: options for policy learning for poverty reduction strategies?***
- 7. Facilitating policy learning: Active learning and the reform of education systems in transition countries***

Questions

The 2006 AF workshop will provide an opportunity to present and discuss policy lessons that can be learned from these three sources of experience - based on draft chapters for the ETF Yearbook 2006 which is devoted to the theme of skills development for poverty reduction in transition countries.

The aim is to further clarify the ETF's future role and contribution in this policy area.

Key questions to be discussed during the workshop are:

- i. What can we learn from experience on skills development and poverty reduction in developing countries?
- ii. What can we learn from internal EU policies and instruments that focus on education and training to improve social cohesion for external policies and instruments aimed at poverty reduction?
- iii. What can we learn from our own experience with VET reforms in partner countries for making these more relevant for poverty reduction?
- iv. How can we convincingly argue for the importance of skills development for poverty reduction, both with policy makers in partner countries and with donors potentially interested to provide assistance?
- v. How can skills, skills development, and poverty reduction be better conceptualised in the context of our partner countries?
- vi. How can we use existing – or develop new - tools and instruments to facilitate policy learning about linking VET reform with poverty reduction?

Expected outcomes

- AF members engaged in reflections and knowledge sharing concerning the relevance of vocational education and training reform for poverty reduction in ETF partner countries
- ETF staff contributions to Yearbook 2006 validated in discussions with external experts and stakeholders
- Policy learning facilitation roles of ETF and possible tools and instruments that staff can apply developed.

Provisional programme

7 June 14.00 – 17.30

What can we learn from experience so far? Questions i, ii and iii.

- Presentation of the theme: Peter Grootings and Soren Nielsen
- Skills development in relation to other poverty reduction measures: Linda Mayoux, UK
- Some recent experience from South East Europe: Anastasia Fetsi plus SEE expert/AF member
- Some recent experience from ESF and Candidate countries: Arjen Deij and Romanian expert/AF member

- Some recent experience from Central Asia in relating national VET reforms and Poverty Reduction Strategies: Henrik Faudel plus CA expert/AF member

Discussants will be chosen from those who register for the workshop

8 June 11.00 – 12.30

How to make better use of existing experience for facilitating policy learning? Questions iv, v and vi

- Skills development and poverty reduction in developing and transition countries; key issues from first workshop: David Atchoarena (International Institute of Educational Planning, UNESCO)
- ETF role: Facilitating policy learning? Peter Grootings and AF member
- Some recent experience from South East Europe: Can we use Peer Reviews to foster policy learning? Arjen Vos and CC expert/AF member

Discussants and overall rapporteur will be chosen from among those who register for the workshop.

Workshop documentation

Peter Grootings and Soren Nielsen, *Skills development for poverty reduction in transition countries*, Background paper for ETF Advisory Forum conference June 2006

Linda Mayoux, *Skills learning for pro-poor development: some current areas of international innovation*, Discussion paper for the Workshop on Skills Development for Poverty Reduction, ETF Advisory Forum conference June 2006

Anastasia Fetsi, *Labour markets and disadvantaged groups in the Western Balkans: opportunities for skills development and enhancement*, Discussion paper for the Workshop on Skills Development for Poverty Reduction, ETF Advisory Forum conference June 2006

Arjen Deij, *From poverty reduction to economic and social cohesion, How can countries be better prepared for ESF type instruments?*, Discussion paper for the Workshop on Skills Development for Poverty Reduction, ETF Advisory Forum conference June 2006

Henrik Faudel, *VET reform and poverty reduction in Central Asia*, Discussion paper for the Workshop on Skills Development for Poverty Reduction, ETF Advisory Forum conference June 2006

Arjen Vos, *Peer reviews and peer learning: options for policy learning for poverty reduction strategies?*, Discussion paper for the Workshop on Skills Development for Poverty Reduction, ETF Advisory Forum conference June 2006

Peter Grootings, *Facilitating policy learning: active learning and the reform of education systems in transition countries*, Discussion paper for the Workshop on Skills Development for Poverty Reduction, ETF Advisory Forum conference June 2006



SKILLS DEVELOPMENT FOR POVERTY REDUCTION IN TRANSITION COUNTRIES

Peter Grootings, Søren Nielsen, ETF, April 2006

Introduction

Skills and skills development are again recognised by the international donor community to be important for poverty reduction. But it is not clear what this means for the systemic reforms of vocational education and training in ETF partner countries.

There is an urgent need to relate the development aid debate on skills development to the practice of systemic VET reforms in transition countries. This may help us not only to focus and prioritise international assistance to the reforms of vocational education but also to secure local ownership, fit to context, capacity building and sustainability.

Impoverished transition countries can benefit from both the experience with skills development projects in developing countries and from the experience with national competence-based education and training policies in developed countries. These issues need to be clarified in order to understand the role that the ETF can play.

Increased recognition of the importance of skills development for poverty reduction

Within the European Union, the “European consensus” is very clear about the importance of education and training for development policy (European Commission, 2002, 2005, 2006). UN organisations such as ILO, UNESCO, UNDP and FAO have made the same point and the international financial institutions, though somewhat more reluctantly, are adopting a similar stance as well (Working Group for International Cooperation in Skills Development, 1996; Fluitman, 2005; King & Palmer 2005; Mayoux, 2006). This is a remarkable change after a long period during which structural adjustment, liberalisation, privatisation and marketisation have been written large in donor agendas and as a result of which assistance to education has almost disappeared and reduced to basic literacy and numeracy skills for children.

In his editorial for the February 2006 edition of e-Courier, the online Newsletter of ACP-EU development cooperation, Sipke Brouwer, of the European Commission’s Directorate-General for Development, confirmed the implications of this recognition for EU policy in Africa: “For too long donors have concentrated only on how to teach African children reading and writing skills. We need to be more ambitious, as we need to provide African young people with the skills, knowledge and ‘can-do’ values to re-create their cities and re-build their social belonging”.

He added: “Today’s young people are the human capital of tomorrow: workers, talents, entrepreneurs and leaders. They must all be given a chance to improve their potential and become active players in the economic and social growth of the continent. Therefore the EU is going to put a greater emphasis on vocational education and training in connection with job markets. This will help turn the current brain drain into a ‘brain gain’ for the whole continent”.

However, despite the increased attention to skills development in the fight against poverty there is ongoing discourse about “what” and “how”: What kinds of skills are crucial for poverty reduction? How can people be assisted in developing the skills they need? Do they only need skills? What kind of policies should poor countries pursue and how can the donor community contribute? As always, answers to “what” and “how” questions are very much interrelated and depend on “why” skills development is found to be important for poverty reduction in the first place.

What does this mean for transition countries?

There is concern among policymakers and their advisors in ETF partner countries whether these discussions about development policy are relevant for them at all. Both terms - skills development and poverty reduction - are not very obvious, nor is their relationship self-evident. It is important to put these terms in context.

For policymakers in transition countries, “skills development” seems to be a narrow approach in the context of systemic reforms of vocational education and training systems, which is the policy framework

they have become used to refer to. "Poverty", as a concept, is a controversial one and is automatically associated with poor developing countries in Africa, Southern Asia and Latin America. While there may be no comparable experience with persistent poverty in transition countries, we will argue that most - if not all - have experienced dramatic impoverishment. Poverty and attention to poverty reduction, moreover, also exist in developed EU countries (European Commission, 2000; Tavistock Institute, Engender & ECWS, 2005).

As King and Palmer note, the dominance of the poverty discourse amongst donors made it necessary to rationalise and legitimate other development goals – such as infrastructure development, education, enterprise development and skills development – in terms of their close connections to poverty reduction (King & Palmer 2005). While the present situation does mean a fortunate return of vocational education and training to donor development policies, it also risks a narrowing down of issues and options. This in turn leads us to the question of whether skills development, whatever this term stands for, in transition countries needs to be considered solely in a poverty reduction context, or whether wider issues are involved.

Before we can turn to the "what" and "how" questions raised at the beginning, there is therefore a need to clarify what we are talking about. What does "skills development" mean and what does the concept of "poverty reduction" stand for and what is the link between skills development and poverty reduction?

What does this mean for the ETF's role in partner countries?

Although a clarification of concepts is urgently needed this cannot be an end in itself. Knowing what we are talking about should ultimately serve another clarification: What would be the role that the ETF can play?

In general terms, we have already agreed on an answer: the ETF can facilitate policy learning, based on its expertise concerning EU and other international experience, on the one hand, and its understanding of the specific context of its partner countries, on the other (Grootings, ETF, 2004). We also understand that policy learning is fundamentally different from policy transfer and policy copying, and that it implies due attention to context, local ownership and capacity building to secure sustainability.

But do these general principles have any meaning for the area of skills development and poverty reduction? If skills development for poverty reduction is relevant for ETF partner countries – and this still needs to be clarified - how can the ETF contribute to helping partner countries in improving skills development so that poverty will be reduced?

Poverty reduction in impoverished transition countries

Poverty and poverty reduction policies

There is consensus that poverty needs to be understood in a multidimensional manner (World Bank, 1990; 2000). This understanding goes well beyond the traditional use of income measures as proxies for poverty but sees poverty as related to low achievements in education and health (Reddy & Pogge, 2005; World Bank, 2000b). The concept of poverty also includes vulnerability, exposure to risk, voicelessness and powerlessness (World Bank, 2000; UNDP, 2006).

Attention to poverty has always been part of development policies but the focus has changed over time. Following King and Palmer (2005, p. 7) and McGrath (2002) we can summarise the various post WW II periods of poverty policies as follows:

- In the 1950s and 1960s economic growth and modernisation were seen by many as the primary means of reducing poverty and improving the quality of life. The focus was on industrialisation and preparing an industrial workforce.
- In the 1970s attention shifted to the direct provision of health, nutrition, and education services. This was seen as a matter for public policy. The *World Development Report 1980*, using the evidence available at the time, argued that improvements in the health, education, and nutrition of the poor

were important not only in their own right but also to promote growth in incomes, including the incomes of the poor.

- During the 1980s there was another shift in emphasis. Countries, especially in Latin America and Sub-Saharan Africa, struggled to adjust after the global recession. The constraints on public spending tightened. Structural adjustment policies, privatisation and private sector development had been pushed by the World Bank and the IMF as a means of tackling economic problems in the developing world. This was the period of market fundamentalism and the Washington consensus (Stiglitz, 2002a). More attention to the social dimensions of development ('people-centred' approaches) began to be seen in response. These initially took the form of bottom up, often NGO lead, project initiatives.
- The 1990s saw structural adjustment with a 'human face', a return of the role of the state and more focus on developing an 'enabling environment' (supporting preconditions for poverty reduction), with the late 1990s and early 2000s seeing the development of poverty reduction strategy papers (PRSPs) to provide comprehensive policy frameworks. As we noted earlier, the 'discovery' of poverty and the definition of anti poverty policies was very much driven by donors rather than national governments.

When conceptualising poverty, there is also a need to consider related issues (King and Palmer, 2005). These include *vulnerability* (insecurity and exposure to risk and occasional periods of poverty), *inequality* (deprivation relative to other people), the poverty of *categories of people* (women, children, older people, disabled people), and *collective poverty* (of regions, nations, groups). However, it is important to recognise that poverty is not the same as *vulnerability*, nor is it the same as *inequality*. While poverty and vulnerability overlap, the distinction is crucial to appreciate the difference between being 'pro-poor' and being 'anti-poverty'. In practice, however, indices for poverty tend to be based on a narrow set of measurable dimensions, such as income per day in particular.

Furthermore, there is a subjective dimension to poverty. It also matters whether people who are statistically classified as being poor actually think about themselves as being so. Subjective poverty moreover is a relative concept and will be dependent on context, environment and history. For national policy makers, there is a comparable issue whether the statistical ranking of the country at the bottom of international poverty scales makes them think of their country as a poor one. Subjective meanings, as we know, are crucial to developing awareness and understanding of policy options.

Finally, at the conceptual level, we need to differentiate the various meanings of "poverty reduction". There are at least three kinds of poverty reduction. Skills development policies will be different depending on the kind of poverty reduction is aimed at (King and Palmer, 2005).

- *Poverty alleviation* - Alleviating the symptoms of poverty and/or reducing the severity of poverty without transforming people from 'poor' to 'non-poor';
- *Lifting people out of poverty* - 'Poverty reduction' in the true sense; reducing the numbers of poor people and/or transforming poor people into non-poor people;
- *Poverty prevention* - Enabling people to avoid falling into poverty by reducing their vulnerability.

Impoverished transition countries

Most transition countries do not have a long history of poverty and although incomes were low these were offset by the provisions of the state welfare systems. Several countries in the former Soviet Union, however, used to be dependent on budget transfers from Moscow which disappeared almost over night after independence. Several have not been able to develop sustainable national economies. Within individual countries, moreover, there have always been considerable regional transfers to balance economic and social differences.

After the post WWII growth period, gradual impoverishment started in all countries during the late 1960s and long before the final collapse of the Communist systems. Countries have been unable to shift from economic growth based on centrally-planned and industrialised mass-production to more diversified,

intensive, high quality products and flexible forms of production. As a result, poverty – both absolute and relative to other non-communist countries – has been on the increase from the 1970s on.

As we now know, transition policies from the end of the 1980s, based on the Washington consensus have barely contributed to improving the situation, at least not in the mid-term (Nelson et al., 1997). On the contrary, poverty indices show for most countries a worsening of living conditions for larger numbers, including the working population. The European Bank for Reconstruction and Development (2005) estimates that every second person in what it calls the Early Transition Countries lives in poverty¹. Even when economic growth occurred towards the end of the 1990s the poor did not profit from this.

Individual and social impoverishment

Policymakers in transition countries tend to associate current poverty issues in particular with the fate of those groups for which there used to be special institutions and provisions, such as orphans and handicapped people. Dedicated institutions used to provide basic shelter, meals and sometimes also special training and income-earning opportunities. These have all closed down with the collapse of the state welfare system. In addition, other groups needing shelter and social integration such as ex-prisoners and – in some countries – ex-soldiers returning from war, have appeared on the scene. Other groups that receive payments from the state have become impoverished as well, in particular old people living on state pensions and the unemployed for whom there are often no benefit payments. State employees and workers who are formally employed but receive no salaries are among the large numbers of working poor.

Thus even if transition countries may not have a history of poverty comparable to developing countries, most transition countries have experienced a gradual, and recently even a dramatic, “impoverishment”. This has resulted in high poverty among large numbers of the population combined with increased inequality between social groups. The case for impoverishment is illustrated by the fact that currently 11 ETF partner countries have signed, or are in an advanced process of signing Poverty Reduction Strategy Papers with the IMF and the World Bank (World Bank, 2006)².

Institutional impoverishment

However, the concept of “impoverishment” which we propose to use in the case of transition countries does not only refer to the living conditions of individuals and their families. The countries have also undergone *institutional* impoverishment, which, in fact, is a second characteristic that makes them different from developing countries. Institutional impoverishment is also closely related to the failure to change from extensive to intensive production and growth and has at least three distinct – but very interrelated - features.

The **first** is that transition countries as opposed to developing countries have established elaborated and well functioning institutions that are typical of modern societies such as education and training, health and welfare systems in particular. However, the crisis of the state budgets that accompanied the economic stagnation since the late 1960s has resulted in under-investments in these institutions which then gradually became outdated and severely under-resourced. Insufficient investments gradually caused the education and training sector to lose its ability to remain an important source of innovation for the economic sector at large.

Nevertheless, basic literacy and numeracy levels have been high since the early 1960s and have remained so until very recently for all age cohorts. Countries have at the same time faced a growing pressure on secondary and higher education systems to expand. In particular secondary vocational education has grown fast but quickly became technologically outdated. Pedagogical approaches remained firmly set within the traditional knowledge transfer approach. Transition policies have been unable to turn the tide, at least for most sub-sectors of the education system. In fact, it is the VET

¹ ETCs are: Armenia, Azerbaijan, Georgia, Kyrgyz Republic, Moldova, Tajikistan and Uzbekistan.

² As of 31 December 2005: Albania, Armenia, Azerbaijan, Bosnia and Herzegovina, Georgia, Kyrgyz Republic, Moldova, Serbia and Montenegro, Tajikistan. The former Yugoslav Republic of Macedonia and Uzbekistan have signed an initial PRSP only. In some countries the papers are referred to as socio-economic development strategies.

system that has suffered most everywhere exactly because it was the dominant part of the education system.

The predominant vocational orientation of the education system accounts for the **second** feature of institutional impoverishment. It created at least three complementary policy responses in the early years of transition.

- The first was a reorientation of higher education which, given limited public resources, obviously happened at the cost of vocational education and training. This reorientation blended in well with - long frustrated - aspirations of citizens and the academics that were called into leadership positions. Basic vocational education had become assimilated with “lower” strata in society and upper secondary technical education was increasingly considered as an alternative route to higher education. Post transition policies reinforced a trend that had started already long before. They also reinforced the trend of neglecting to invest in high quality vocational and technical education.
- An important side effect of this development after transition was that children from poor and impoverished families became excluded from entering secondary general and higher education streams mainly because they could not afford the costs. Vocational schools tended to become the only option for children of poor families, often more for welfare reasons rather than educational ones. Keeping vocational schools open was considered to be one of the last options to keep some kind of welfare system for the poor in place especially in those countries where the schools were under the responsibility of ministries of labour and social affairs.
- The third response was an attempt by educational policymakers almost everywhere – often responding to donor advice - to give up the vocational education part of the system, which was not only very expensive to maintain and modernise given limited state budgets but also ideologically discredited. It was also completely outdated in terms of its curricular contents and didactic approach. Facilities, moreover, were worn out and often in need of total renewal, for which of course no state funding was available.

These policy responses have contributed to the **third** feature of institutional impoverishment in vocational education: the disappearance of innovative capacities. Schools and teachers had to focus exclusively on operational day-to-day provision of education and training at the cost of development and innovation. It was also the result of the closing down of central support systems, for ideological and financial reasons, especially those for curriculum development and in-service teacher training in vocational education (Grootings, ETF, 2004; Grootings and Nielsen (eds.), ETF, 2005). Because of the extremely low salaries for teachers and trainers many were forced to seek additional income opportunities outside the education system. Many of the most capable left the system all together.

Impoverished social capital

There is another dimension of impoverishment that has not received sufficient attention so far but which is of crucial importance from an education point of view. This refers to the loss of capacities, especially among older generations and in the early stages of transition, to “survive” in a society that is based on very different principles. This is what the concept of “life skills” or “social capital” refers to. Modes of behaviour and thinking, routines, social capital networks, survival strategies in the general sense of the word, do not work any longer as they used to. Poor people especially suffer from this loss of capacities, as they cannot buy their way through. Learned behaviour has become unhelpful and it is obvious that education institutions have a role to play here as well.

The need to revive vocational education and training

As a consequence of these developments there is a dramatic lack of resources, financial and human, to revive the vocational education and training system. Instead, a specific constellation of aid and cooperation is in place. The donor community now greatly influences whether vocational education is taken up as a policy priority at all, what focus these policies take and how they are being developed and

implemented. The combination of individual memories, institutional legacies and donor policies have so far clearly not favoured addressing issues related to the reforms of vocational education and training.

The overall result of what we have called "impoverishment" is that the vocational education system in many transition countries is no longer anymore capable of reconstructing itself to its former glory, not to mention to face, without considerable external assistance, the challenges of systemic reform.

The combined processes of individual, institutional and social impoverishment have instead created a situation in which vocational schools have become the education institutions for the poor without having the real potential to contribute to any kind of poverty reduction at all (Faudel and Grootings, forthcoming). A reform policy aimed at linking vocational education to poverty reduction should address these developments. It must in particular secure the relevance of contents and approaches to the learning needs of the impoverished, including their capacity to escape from poverty.

It may be useful now to clarify what skills development has to do with vocational education reform before we enter the discussion about the possible poverty reduction contribution that skills development can have.

Skills development: old style technical and vocational training or a metaphor for lifelong learning?

Donors understanding of skills development

Like "poverty reduction" also "skills development" is a neologism as King and Palmer (2006) rightly point out. The concept of "skills" itself has become a much debated one within education communities. It has been criticised for its narrow and behaviouristic connotations; its exclusion of knowledge and attitudinal dimensions and unfitness as an education and training concept for facing the challenges of knowledge-based economies. In current educational parlance it has been replaced by the concept of "competence" which has, however, in practice often not meant more than a change in labels as traditional learning and didactic approaches remained unchallenged. This is changing rapidly, however, with the current discussions on competence-based learning within a constructivist learning and teaching approach (Simons et al., 2000, Biemans et al., 2004, Hager, 2004, Oates, 2004, Ellerman, 2005, Grootings and Nielsen (eds.), ETF, 2005).

The term "skills development" as King and Palmer also argue is coined and used by donor agencies who themselves have increasingly lost in-house expertise on technical and vocational education and training (King and Palmer, 2005; Working Group for International Cooperation in Skills Development, 2004). It is a term which reflects the failure of the large donor investments in national technical and vocational education and training systems (TVET) of the 1960s and 1970s³. But it still continues a largely behaviourist understanding of skills as opposed to knowledge implying – if sometimes perhaps only implicitly – that basic manual skills are really all that the poor would need. It will be a challenge to reconnect the skills development debate in the donor community to today's policy discussions on education and training for the future.

Attempts to broaden the notion of skills into "life skills" or "livelihood skills" all seem to be somewhat artificial and at the same time illustrate the difficulty within the donor community to stick to the skills concept (UNESCO, 2006; UNICEF, 2006). It is against this background that King and Palmer (2005, p. 11) suggest the following description:

Skills development is not equated with formal technical, vocational and agricultural education and training alone, but is used more generally to refer also to the productive capacities acquired through all levels of education and training, occurring in formal, non-formal and on-the-job settings, which enable individuals in all areas of the economy to become fully and productively engaged in livelihoods and to

³ The World Bank, the UN organisations and many bilateral donor agencies still use the TVET concept whereas the EU speaks of vocational education and training (VET). The TVET concept relates to two different levels of formal vocational (lower or basic) and technical (middle or higher) level, whereas the VET concept has always been more inclusive, in terms of levels (it also covers higher vocational and non-academic education) and – more recently - also in terms of non-formal and informal forms of education and training.

have the opportunity to adapt these capacities to meet the changing demands and opportunities of the economy and labour market.

They also suggest that skills development does not refer to the curricular or programme source of education or training itself but to the productive capacities that are acquired through these skills courses and programmes. It is here that the donor development discourse comes closest to ongoing vocational education debates and reform policies in developed countries.

Lifelong learning and learner-centred vocational education and training

These debates focused during the mid 1980s and 1990s on making formal, often school-based vocational education, more practice oriented, on the one hand, and making work-based training broader through a stronger emphasis on so called key or core competences. This policy needs to be seen against the background of increasing youth unemployment at that time which became related to shortcomings in both types of education and training. Education, also in vocational schools, was either seen to be too much academic in nature or not sufficiently practice oriented. Schools were accused of not producing graduates that could be used by enterprises. Work-based learning was seen to be too job-related and not future-oriented enough.

The new policies all tried to give enterprises a bigger role in vocational education and to make vocational education and training refocus on learning outcomes (initially worded as skills and more recently as competences) rather than on inputs such as curricular programmes and teacher and trainer roles. The new policies also often gave priority to qualifications rather than processes of teaching and learning, in particular in countries where there was no strong tradition of cooperation between the state and private sector. This development often led to an increasing centralisation and bureaucratisation of qualification systems drawing resources away from the real education and training processes. One of the underlying reasons for this to happen was the adherence to traditional concepts of learning (Hager, 2004).

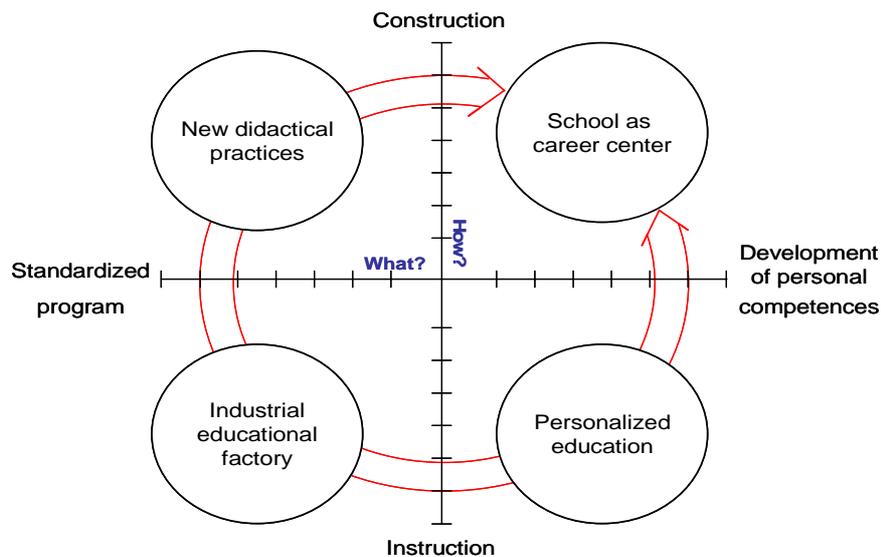
However, since the end of the 1990s it became increasingly clear that a strictly outcome-based education system would not really guarantee the quality and relevance of education and learning. Many countries are now seeking to re-establish the balance between a learning outcome-based policy and policies that focus on assuring quality of inputs and processes. Those countries that turned to qualifications and national qualification frameworks during the 1980s are bringing back an attention to processes. Those countries that did not introduce strict outcome-based policies are now including elements that have become part of national qualification frameworks, such as pathways, transparency and recognition.

This recent change also includes recognition of the key role of teachers and trainers for quality education and training (Grootings and Nielsen (eds.), ETF, 2005). Teachers and trainers are no longer regarded as experts who pass on their knowledge and skills but as facilitators of learning processes. This generally means a move away from a narrow – behaviourist – “skills” approach towards a much broader “competence” concept, rooted in constructivist learning theories. The development of new didactical practices is receiving attention as well especially in the search for approaches to help people develop new kinds of competences, such as the ability to learn, to cope with uncertainty and to be entrepreneurial.

The notion of “skills development” as used in the international donor community is therefore in many ways at odds with current discussion and policy about modern vocational education and training. It is part of the development aid vocabulary and rooted in educational approaches of the past but creates confusion in the communication with the education community. On the other hand, the development aid community is not well aware of current discussions and policy developments in vocational education and training in developed countries.

Before coming back to issues around skills development for poverty reduction, it may therefore be useful to first present the current thinking about vocational education and training. In figure 1 we summarise the current discussions in some of the EU countries as regards the “what” and “how” of modern vocational education (Geurts and Meijers, 2006).

Figure 1 Vocational schools: from training factories to career centres.



Traditional standardised instruction

The “what” dimension concerns the contents of vocational education and training programmes. Traditionally, these are standardised programmes, based on a number of isolated subjects, delivered by teachers and trainers individually. Everybody has to learn the same, in the same order and in the same way. Everybody is also examined at the same time and is therefore assumed to need the same period for study as everybody else. This can truly be called the industrial education factory. Most vocational schools, and most thinking about vocational education policy, are still firmly located in the lower left corner.

Personalised and flexible instruction

Some of the more active schools and advanced policy thinkers are concerned about the need for more flexibility. There is a recognition that products and services need to become more diversified and client-oriented. There is also concern for efficiency and costs. This leads to attention to broader profiles with gradual specialisation instead of narrow profiled curricula, multi-sector instead of mono-sector profiles. Recognition and quality assurance become important so that people can move flexibly from one level or sector to another. The introduction of forms of modularisation is to replace subject-based and annual school programmes.

Flexibilisation also takes account of the fact that students have different learning styles. Some prefer theory first before practice, others learn better by starting from practice. Some students learn faster than others while they may also have different prior knowledge or experience and do not need to go through the same programme at the same time and in the same order. Certain forms of modularisation respond to this as well. Programmes become more learner-centred and the schools provide individual learner trajectories instead of standardised programmes; they also become better equipped to cater for different groups of learners, young and adults, employed and unemployed, beginners and more experienced ones. The lower right corner of figure 1 typifies these kinds of programmes, schools and policies.

Both the standardised and the personalised forms of vocational education and training are often based on a traditional approach to learning and teaching, no matter whether this is about knowledge, practical skills or attitudes. They follow a traditional pattern of transfer from the teacher and the trainer to the student. Teachers are considered as the experts in a particular subject whereas trainers are the experts in how knowledge has to be applied in practice. In the pre- and in-service teacher and trainer education this is reflected by a priority given to subject knowledge at the cost of didactics.

New education approaches in standardised programmes

Didactics are the primary concern of the “how” dimension. The main thrust here is that vocational education has to make the transition from learning-from-instruction to learning-by-construction. The learning cycle is inverted: theory must not necessarily always and for everyone precede practice any longer. Practice can also guide theory which then has to be presented just-in-time and just-enough. This approach is being implemented via various forms of problem-driven or practice-driven education. The division between theory and practice, learning and working, and between school and enterprise, becomes less pronounced.

On the upper-left and lower-right corners of the figure, we see intermediate forms of education. New didactical practices, such as problem-driven education, are to the upper-left. In most EU countries, if there is any experimentation at all, new practices are almost always placed within traditional standardised programmes. The lower-right hand corner refers to the modular organisation of existing educational programmes. This *à la carte* education – but often this is just training - is similar to custom-made education, but is not innovative in the didactical sense. This is nevertheless often what is presented as modern vocational education and training.

Individual learning by construction

Opposite to the school as a factory, in the upper right-hand corner, the school is pictured as a centre for optimal career development. The starting points for achieving a recognised qualification are the interests and capacities of the students. Students develop their own unique set of abilities via a flexible programme, with individual, customised training as the terminus. Construction of knowledge and skills – as opposed to instruction - is the primary form of learning and teaching.

The combination of non-standardised, personalised vocational education and training with student-centred didactic approaches in which the teacher and trainer act as facilitator of learning, is still at an early stage of development. Some countries are introducing vocational education system reform, including pre- and in-service preparation of teachers and trainers, along these lines (Grootings and Nielsen (eds.), ETF, 2005, Descy and Tessaring, 2001). These developments will need to be taken into account when discussing the “what” of a possible contribution of skills development for poverty reduction in ETF partner countries. But also the question as to “how” countries can be helped in reforming their vocational education and training systems needs to be reviewed against the background of the new learning approaches (Grootings, ETF, 2005).

In the next section we will address three sources of experience that can help in developing an understanding of the “what” and “how” of skills development for poverty reduction.

Skills development for poverty reduction in transition countries: three sources of experience to guide the ETF policy learning facilitation role

The current debate on skills development for poverty reduction is largely spiced by experience from poor developing countries (Sub Saharan Africa, Latin America and South and South East Asia). A second - but largely untapped - source of experience is the EU’s own policies and instruments for social cohesion and how vocational education and training is supported to balance economic and social development. Both kinds of experience are not easily transferred to transition country contexts.

But important lessons can perhaps be learned in particular when combined with a third source of experience, namely that of the VET reforms in ETF partner countries of the last 15 years. In combination, these sources of work indicate that:

- skills are important but more is needed both in terms of complementary resources (including financial ones) and a wider enabling environment

- national skills development policies need to be broader than merely focused on poverty reduction but they should also be inclusive of the poor
- local projects – even though a valuable source of innovative experiences – have severe limitations and limited sustainability
- they need to be integrated at the local level, with key public and private institutions, and at the national level, with overall policies in the education and training sector
- even if part of sector wide approaches, vocational education and training reforms will have only limited impact if not related to policies aimed at establishing wider enabling environments
- overall, substantial change will only come when governments, with donor support, invest across the board, to produce an enabling environment for both public and private sectors and invest in improving the quality of vocational education and training.

More specifically, overall policies need to include skills development together with skills allocation and skills utilisation. The development, allocation and utilisation of trained and educated capacities require facilitative infrastructures. Among the most critical are those related to education and training, labour market, work and employment. Also in poor or impoverished countries, therefore, skills development policies need to be related to a wider policy context addressing questions regarding what kind of jobs are - or will be - available and how people access or can develop capacities to access which kinds of jobs.

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SKILLS LEARNING FOR PRO-POOR DEVELOPMENT: SOME CURRENT AREAS OF INTERNATIONAL INNOVATION

Linda Mayoux, April 2006

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In the context of changing production systems there is increasing recognition of the pivotal role of both education and training for both economic and social goals. No society can succeed in a globalised environment unless people have adequate knowledge and skills. These are vital not just for maintaining competitiveness and ensuring adaptable and productive enterprises but also for achieving personal and social development. In particular, a well functioning system of education and training enhances both economic and social integration by offering opportunities to many groups who would otherwise be excluded from the labour market. This is especially important for promoting gender equality and overcoming many forms of discrimination (ILO 1999).

Summary

Education and training are explicitly part of the pro-poor growth framework in many multilateral development agencies, including ILO, UNDP, World Bank and bilateral agencies like DFID, SDC and CIDA. Nevertheless throughout the 1990s, despite official commitments in many development agencies to human resource development and poverty reduction, funding for training and skills development decreased. This was partly because studies by World Bank and others concluded that the large VET programmes of the 1960s, 70s and 80s had generally failed to contribute to employment creation or economic growth. However, the current market-led business development services approach also has serious shortcomings in relation to pro-poor development.

This paper argues that there is a need for a much more broad-based approach which responds to the multidimensional nature of poverty. Evidence of effectiveness and potential areas of innovation relevant to transitional economies can be found in a number of projects in Asia, Africa and Latin America.

State versus markets? Shortcomings of current orthodoxy

Education and training are explicitly part of the pro-poor growth framework in many multilateral development agencies, including ILO, UNDP, World Bank and bilateral agencies like DFID, SDC and CIDA. Skills development and training for the informal and formal sectors are an essential component of ILO's Decent Work policy framework. This includes explicit attention to the needs of particularly excluded and disadvantaged people including women, the extremely poor, the disabled and ethnic minorities. Moreover education and training are not only instrumental to economic growth, but also a basic human right, explicitly mentioned in the 1948 Universal Declaration of Human Rights and many international and regional agreements and national constitutions.

Nevertheless throughout the 1990s, despite official commitments in many development agencies to human resource development and poverty reduction, funding for training and skills development decreased. This was partly because studies by the World Bank and others concluded that the large VET programmes of the 1960s, 70s and 80s had generally failed to contribute to employment creation or economic growth. In some countries like Singapore, Republic of Korea, Malaysia, Mauritius and Ireland carefully targeted investment in human resources combined with investment in physical capital and industries and industrial expansion was relatively successful in bringing about sustained growth. In countries where the economy itself failed to grow to provide jobs for trainees, training in itself has been less successful at either stimulating growth or increasing the incomes of trainees. Smaller training programmes aimed at groups facing only moderate problems in the labour market yielded positive results. But broad and untargeted interventions have been universally ineffective. Much of the training was for skills for which there is little demand, skills acquired are very poor, facilities and infrastructure are inadequate and there is hardly any follow-up of trainees. Serious shortcomings were particularly evident in relation to training for women. Women were vastly under-represented in formal business training programmes and 'mainstream' skills programmes of the 1970s and 80s. The few training programmes to which women gained access gave training in a small number of 'female skills' with limited market potential.

This paper summarises and adapts material from a Draft Discussion Paper 'Learning and Decent Work for All: New Directions in Training and Education for Pro-poor Growth' Mayoux 2006 prepared for ILO InFocus Programme. The full copy of this paper and the Case Studies on which the discussion is based can be found on the author's website:
http://www.lindaswebs.org.uk/Page2_Livelihoods/BDS/BDSIntro.htm

The policies promoted for market-led business development services (BDS) undoubtedly represent a move forward in the attempt to address some of the shortcomings of earlier large-scale publicly funded programmes, in particular:

- a focus on demand-led services which respond to market realities rather than top-down supply-driven training.
- a focus on participatory methods which build on peoples' existing experience and skills.
- training as part of a basket of services including market linkages and input supply, infrastructure support, technology and product development, financial support and policy advocacy.
- an emphasis on long term sustainability and institutional collaboration. This latter is seen as essential to combining programme focus with addressing the need for integrated service.

However they also had a number of shortcomings which potentially marginalise and disadvantage the very poor in both training itself and the growth process in general:

- what is meant by 'demand' is unspecified. Although there is a need to respond to the needs of entrepreneurs, they are not always in a position to be aware of and identify longer term changes or underlying training needs. There is a need to balance response to immediate needs for practical skills with attention to more underlying questions of basic competences. These also need to incorporate training addressing wider social concerns like decent work, gender, disability awareness and so on which are necessary for pro-poor development but may not necessarily have spin-offs in terms of immediate income increases for entrepreneurs.
- the main focus is explicitly on entrepreneurs already in small enterprises, and explicitly excludes 'income generation' (IGAs) or 'subsistence-oriented' activities and also any provision for employees or wage workers. Many people, particularly women, are likely to be juggling a diversity of market and non-market activities, wage and own account work in order to cope with the pressures of poverty. Appropriate training and other support needs to start from their initial situation and enable them to develop a realisable life vision and strategy for improvement which might incorporate diversification of activities and their livelihoods as a whole.
- the focus on cost recovery and short-term financial sustainability means that services are generally outside the payment capacity of the very poor. No assessments have been done of the assumed 'trickle-down of benefits' of small and medium enterprise development to workers and employees. Such assumptions need to be seriously questioned in view of the very limited attention to employee skills training itself within small enterprises, the frequent use of credit for labour-saving technology and lack of attention to labour welfare in enterprise training programmes.
- reliance on market solutions presume that there are sufficient providers to constitute a competitive market which will improve quality and push down costs to clients. It also assumes that clients are sufficiently informed about the different options and have non-discriminatory access to BDS markets. In general current BDS provision is largely inadequate on both counts. In most rural areas, in particular, where the number of accredited training centres is very limited and widely dispersed choice is seriously limited and hence competition pressures on providers to ensure quality and cost-efficiency.
- there has been little in the way of investment in skills development programmes for livelihoods of the very poor. Although, as discussed below, skills training for livelihood diversification of the very poor can be extremely effective in poverty reduction, particularly for women, it remains marginalised in donor and government policy.

The issue is not therefore subsidies versus markets, but how to incorporate some of the elements of the market approach within the context of a properly funded system which really addresses the needs of poor people with different livelihood patterns within the context of a constantly changing economy.

Knowledge and skills learning for pro-poor development: a multidimensional framework

It is now generally recognised that poverty is a multidimensional phenomenon. Even development agencies like the World Bank which earlier focused only on income poverty from the late 1990s began to use a broader multidimensional framework in both analysis of poverty and consideration of policy responses. This included not only tangible dimensions like income, health and education, but less tangible but equally important underlying dimensions of vulnerability and voicelessness. Moreover these different dimensions are interlinked – locking people in a vicious cycle of downward mobility or, if appropriately supported, enabling a virtuous upward spiral of poverty reduction. By 2000, the World Bank development framework had come to emphasise the importance, not of growth per se, but labour-intensive growth, re-establishment of broad provision of public services, promoting opportunity and security. It also included a new emphasis on empowerment and included gender equity.

There are many types of training which are needed by very poor people and which could make a significant contribution to pro-poor growth. Although 'proof of impact' is patchy, there is sufficient evidence to indicate some common elements as indicated in Box 1.

Firstly training must proceed from a clear understanding and commitment to the principles of freedom, equity, security and human dignity as specified for example in the ILO's Decent Work Agenda. These principles must explicitly and clearly underlie the content and methodology of all publicly funded training at all levels. This includes not only poverty-targeted training but also training for medium and large scale enterprises and the trainers themselves.

Secondly, the content of training must be adequate to equip poor women and men to take advantage of emerging opportunities and decrease their vulnerability in rapidly changing economic and social environments. Technical or enterprise skills training must ensure skills are relevant to markets and can be adapted to market changes over time. These needs cannot necessarily be predicted even in the medium term by trainers in a training programme. This means that for poor women and men any training strategy must include analytical skills to enable them to continually access and assess information for themselves from a range of different sources. Where necessary this also needs to include basic numeracy and literacy. Empowerment skills are also essential to enabling people to negotiate in markets, including labour markets and subcontracting chains, and also to flexibly respond to changing market demands and opportunities. Training must integrate negotiation and organizational skills to address underlying forms of inequality and discrimination because of gender, ethnicity, age and disability. At the same time 'less tangible' skills, and even literacy and numeracy, may only be seen as relevant and followed through by participants when taught in such a way as to be directly related to improving incomes and livelihoods. The most effective training combines all these elements in some way.

There are clear contributions to reducing household poverty through integration of gender training throughout training courses for both women and men. Although dramatic changes in intra-household relations cannot be expected from short courses attended only by women, some changes have undoubtedly occurred which can then be reinforced over the longer term through other interventions like micro-finance groups. The most significant changes have been where strong women's organizations are combined with gender training for men and women. Here the focus has been on not only women's empowerment, but the importance of men honouring their household responsibilities if their families are to come out of poverty. Such changes cannot however be expected merely from short-term invitations for men to attend some women's meetings. They require development of sustainable organizations with a strong gender focus.

Thirdly, once these basic skills have been attained, quality skills training will be needed either in technical skills and/or enterprise skills if incomes are to be significantly increased. The evidence suggests that this is best provided as part of a long-term process of upward graduation, through a range of arrangements including mentoring, networking and mutual learning. A key innovation which might be considered in more detail would be the incorporation of training on how to obtain information about private apprenticeship arrangements and subcontracting, how to negotiate win-win agreements and get the best on-the-job training and experience. This would also need to be combined with a programme of awareness-raising for employers and upstream buyers through public media to change attitudes and barriers at that level.

Elements of a learning strategy for Decent Work for all

Underlying principles of decent work in all training

- Work in conditions of freedom, equity, security and human dignity.
- Freedom of association and effective recognition of the rights of collective bargaining.
- Elimination of all forms of forced or compulsory labour, including child labour.
- Elimination of gender and other forms of discrimination in respect of employment and occupation.

Content: training for decent work

- Combined livelihoods training incorporating analytical and empowerment skills, and where necessary, basic literacy and numeracy.
- Training in learning and information skills: sources of information about markets, value chains, other organisational support and services and how they can be accessed.
- Rights training with regard to private sector and public sector provision and services and how to negotiate 'win-win' solutions: e.g. what apprentices can expect from private training or home workers from sub-contracts, how to negotiate different sources of informal and formal credit, negotiation of market sites, get legal aid and demand accountability of local government.
- Gender and other anti-discrimination training integrated throughout training courses for women and men.
- All training to facilitate peoples' own analysis of their opportunities and challenges and to conclude with their concrete and realisable proposals for ways forward, including sustainable networks between participants for follow-up contacts and collaboration.

Participatory methodologies: decent work for all

- Use of diagrams, symbols and role play to make training interesting and accessible for illiterate as well as literate participants and enable illiterate people to play an equal role in discussions.
- To develop skills in finding out information and informing others about their own experience.
- To build confidence, communication and negotiation skills and networking, organisational and advocacy skills.

Diversity of ongoing delivery and support

- Delivery of training adapted to the time and resource availability of the target groups.
- More provision of mentoring and facilities for mutual learning.
- Where more conventional formal technical training is needed this should be done by people who have an understanding of the situations of poor people and market needs, particularly entrepreneurs who have themselves moved up.
- Integration of ongoing learning into other livelihood interventions like micro-finance, programme planning and impact assessment.
- Full integration of anti-discrimination training and Decent Work principles into all publicly funded training for large and medium-scale enterprises as well as small and micro-enterprises.

Finally, alongside this focus on skills, there is also a need for information about rights, relevant organisations and organisational skills for lobbying and advocacy. Key issues here for women are likely to be property rights and how to combat violence. More generally for both women and men there is a need for information on how to obtain market spaces and rights, the obligations of local government and how to organise to pressure local government to honour its obligations.

Training should also end with concrete plans for ways forward designed by the participants themselves with targets set by them and methods for assessing progress in relation to these. It is common in enterprise training to insist on forms of record-keeping which are neither necessary nor practicable for very poor people – as indicated by the low take-up and often negligible income impact. What is needed is a participatory discussion of exactly what sorts of information, how often and in what form people might need in order to increase incomes based on the sorts of information which people are already keeping in their heads. These action plans should also include discussion of possible roles for ongoing networks between participants and/or with other networks and institutions and how these can be set up and maintained. Where a need for collective action or lobbying is identified the training itself should help people agree concrete plans, roles and responsibilities.

Current innovations in skills development for livelihood improvement and empowerment

Parallel to, and to a large extent marginalised by, the ‘mainstream’ debates about the best mix of subsidised and market approaches, there have been many small-scale project-level innovations in poverty-targeted training methods and content, particularly in female-targeted projects. Those with potential relevant to transition countries have included:

- Integration of life skills, gender awareness and empowerment into livelihood and entrepreneurship training.
- Participatory methods which focus on participant bottom-up learning rather than top-down ‘expert’ training and which are accessible to illiterate people.
- Training as part of a set of poverty-targeted programme strategies including micro-finance, marketing support, organisational strategies and macro level advocacy.
- Skills upgrading training targeting different levels of particular economic sectors: employees, outworkers and upstream enterprises as part of an integrated pro-poor sectoral approach.
- Training which attempts to address broader political empowerment and civil society development.

In many cases two or more of these elements have been combined. However these innovations have so far been marginal in donor-level debates and also funding.

Some examples of international innovation

Participatory action learning SYSTEM (PALS)

Training develops diagram-based action learning tools which can then be used by individuals and groups or communities for livelihood development, organisational development, advocacy and programme planning, monitoring and evaluation. The emphasis is on developing self-reliance in learning and systems of peer information exchange. Gender issues are integrated into the analysis. Currently being developed in Kabarole Research and Resource Centre, Uganda, Learning for Empowerment Against Poverty programme in Sudan and ANANDI in India.

Value chains approach

Skills and enterprise training for increasing the benefits and negotiating power of women in the context of industry upgrading. Currently being developed in different ways by Udyogini in India and Aconsur Peru.

Ongoing training with micro-finance or employment schemes

Integration of skills/competencies training into group meetings for micro-finance, or with savings schemes under employment programmes to increase their longer term sustainability. Examples include Women's Empowerment Programme, Nepal and Tangail Integrated Development Programme, Bangladesh.

Skills training for women in non-traditional activities coupled with grassroots organisation

Skills training for women in non-traditional activities often requires support and follow-up through informal associations or possibly cooperatives to change the market context within which women operate. This approach is taken by ANANDI in India to help women in construction become skilled masons.

Mutual learning events

Bringing together large groups of workers/entrepreneurs to exchange experiences and ideas and develop networks for ongoing skills development or even apprenticeships between themselves can often be more effective and much more sustainable than conventional training. These types of events have been organised for different purposes by for example ANANDI in India, Gatsby Trust in Africa, LEAP in Sudan and KRC in Uganda. These events also provide a very good basis for developing strategies for policy advocacy and identifying wider types of support or change needed within particular sectors.

Learning for all: scaling-up and sustainability

Exactly how the above examples of innovation could or should be adapted in the context of transition countries in terms of both content and methodology will require further discussion and further innovation. In particular how current interest from the World Bank and donor agencies in NGO strategies could be harnessed and built on to reach the scale required for a significant impact on poverty. Experience in low-income countries does however point to some ways forward also for scaling-up and sustainability.

The wide diversity of training needs does not necessarily imply a long string of separate modules and discrete subsidised training courses. Particularly in relation to basic and empowerment skills there are ways in which the methodologies of even technical skills training can increase confidence, build skills in obtaining and sharing information from different sources, analytical and planning skills and capacity for group collaboration and collective action. Some methodologies, for example PALS, have considerable potential for increasing promoting participation and inclusion and developing analytical and empowerment skills as an integral part of other training. Other important methods which are used involve role play which could also include simulations of different types of collaboration and collective action. Crucially it entails a change in the power and status relationship between trainer and trainee whereby trainers facilitate the building of trainee confidence and questioning and see themselves as 'learners about poverty and the strategies of poor people' rather than top-down imposition of 'solutions for the ignorant.'

Nor does the diversity of needs necessarily imply much more intensive skills training by subsidised providers for any one participant. It implies rather a much broader definition of what constitutes training and better integration of different types of learning processes. Evidence suggests that, apart from maybe 'emersion' training for women unused to being away from home or needing exposure to formal training environments, training is best given in a series of short sessions over time to enable people to assimilate and form their own questions about what they are learning. Moreover there needs to be greater emphasis on developing structures for mentoring, mutual learning, ongoing problem-solving and

collaboration rather than only one-off 'expert' training. There is a need for private sector involvement to ensure that those doing the training have the relevant knowledge and experience of current market situations and needs, provided trainees know how to identify and communicate their training needs and negotiate with skills providers to ensure that they are trained and not just used as cheap labour. There is also a need for a much more mutual learning and networking like the fairs organised by ANANDI in India and KRC in Uganda.

It is unlikely that training which really targets the poor and very poor can ever itself be financially sustainable, any more than primary education or health care. This is so even if the training is in high demand and significantly increases incomes over time. Some training programmes have managed to recover some costs from participants. But this has either been after trainees have enjoyed the benefits of the first training to increase incomes sufficiently or has adversely affected poverty reach. Some programmes have also used volunteer trainers but unless trainers receive other benefits like micro-finance, quality of training may be jeopardised. Moreover, even the largest of the programmes discussed above are small in relation to the scale of training needed to have a significant impact on national economic growth and poverty levels. This will imply a commitment to adequate investment into training by governments and international donor agencies as well as collaboration with the private sector and facilitation of lateral learning processes. That said, there are ways of both scaling up outreach and increasing sustainability and cost-effectiveness of individual training initiatives.

Firstly more effort could be put into the now common process of 'training of trainers'. Poor women and men commonly teach each other and spread skills. However little attention is generally paid to teaching trainees how to teach others and/or following up on whether this has happened. More consideration also needs to be given to ensuring that the trainers get some sort of recognition or benefit for their effort and that these issues are discussed in the training. This could be either facilitation of linkages with groups who would pay them and cover the costs for very poor trainees, or some sort of social recognition e.g. invitation to participate in associations or exchange visits to further upgrade skills.

Secondly more use could be made of media like radios and even the internet. This includes both training itself and the promotion of positive images and role models of successful cases of upward mobility and empowerment.

Thirdly, there is a need for much better integration of training into other dimensions of programme delivery, in particular micro-finance and impact assessment. The recent shift to minimalist micro-finance is not necessarily the most developmentally effective or cost-efficient means of poverty reduction and misses a very important potential means for the cost-effective delivery of training. The large amounts of money currently spent on monitoring, evaluation and impact assessment could be used to develop effective information systems for ongoing participant action learning and programme innovation. The innovations in poverty-targeting in small-scale projects also have valuable lessons for some ways of integrating poverty targeting into larger-scale 'mainstream' programmes.

Finally the focus on developing the human capital of the poor and very poor does not preclude training and education for the modern sector or for entrepreneurs in medium and large industries. It does however require that in place of mere assumptions of 'trickle-down' explicit strategies to facilitate increased benefits for the poor and spreading of skills downwards need to be an integral part of training at this level. Entrepreneurs need to be better at training apprentices and negotiating mutually beneficial rather than exploitative arrangements with sub-contractors. They also need to question their own gender stereotypes and behaviour towards more disadvantaged groups. Gender awareness, anti-discrimination training and human management skills need to be integrated into higher level training and also for staff in BDS providers.

A coherent and equitable strategy: institutional and political challenges

These changes will require a significant shift in funding priorities and real commitment to investment in training and skills development for the poor as an integral and core element in the pro-poor growth agenda. The content of 'market-led' services needs to be redefined to incorporate not only the technical and managerial skills directly required by enterprises for their market competitiveness and survival, but also the basic and life skills needed by the poor in order to negotiate and manage livelihoods in

response to market opportunities and constraints. It requires a serious commitment to target and design innovative training for the very poor, including paths for upward mobility to other types of training. It requires a rethinking of ways in which poverty-targeted training can be integrated into other types of pro-poor interventions like literacy, micro-finance and sub-sector development and how these themselves can be more effectively poverty-targeted.

Crucially it requires a political shift from rhetoric of pro-poor growth which sees the poor as needing to be integrated at the margins into 'growth as usual' to a real commitment to developing the skills and potential of the vast majority of the world's women and men as part of a human rights agenda for growth itself. This will require changes in the economic, social and institutional environment to adopt macro-economic, fiscal and other policies in support of large-scale training programmes for the poor. It will require investment to change 'mainstream' training and crucially also the trainers. Equity concerns: poverty, gender, ethnicity and disability need to be integral themes in mainstream training and interventions for enterprises upstream in value chains and into mainstream education and training at all levels. It will also require an 'ethical shift' in business practice to reward private sector enterprises for giving appropriate attention to the training needs of their workforce.

Unless the rights of the very poor to skills development and training are prioritised, they will become even more marginalised not only by economic growth but even by 'human resource development'. The primary focus on basic education for children excludes the majority of adult women and men on whose income their children's access to education depends, thus perpetuating inequalities to the next generation. The focus on small enterprises and cost recovery in poverty-targeted interventions risks leading to further marginalisation and disadvantage of micro-enterprises further down the value chain. The failure to seriously address the training needs of employees and workers undermines both enterprise efficiency and employee incomes. In all cases the impact on women in terms of increased exploitation, unmanageable workloads and ill-health are likely to be particularly damaging. In all cases this is in contravention of Human Rights Agreements and undermines not only 'pro-poor growth' and social cohesion but the economic and political sustainability of global growth in general.



LABOUR MARKETS AND DISADVANTAGED GROUPS IN THE WESTERN BALKANS: OPPORTUNITIES FOR SKILLS DEVELOPMENT AND ENHANCEMENT

Anastasia Fetsi, ETF, April 2006

Skills development for the impoverished working poor

Over the last 20 years there has been a gradual impoverishment of the population in the Western Balkan countries. At the beginning of the 2000s, between 10-30% of the population in the Western Balkans lived below the poverty line. These are not necessarily unemployed or inactive people. Many of the poor are involved in low skilled, low added value economic activities in the informal economy and subsistence agriculture: the so-called working poor. However, around 80% of those poor people have very low levels of education.

This implies that there is a strong correlation between education, skills and poverty. The question arises as to whether those people have opportunities to increase their skills and break the vicious circle of low skills, informality/unemployment and poverty? And if so, what is the role of public services in those opportunities?

The ETF's work in this field demonstrates that there policy makers are not sufficiently aware of the potential that can be created by enhancing the skills of people who today are trapped in poverty. This is true for poor people themselves and the whole process of the economic and social development of their countries. Policy actions are limited and the gaps are mainly covered by donor projects. In view of the countries' future accession to the European Union, a concerted effort has to be made in order to address the skill gaps of poor people in a systematic way.

The vicious circle of poverty, joblessness, informality and lack of skills

The foundations of the economic and social infrastructure of the Western Balkan countries have been challenged over the last 20 years. This has been the outcome of economic mismanagement in the 70s and 80s and wars and ethnic conflicts in the 90s. The economic restructuring process has destroyed many unproductive jobs without creating new jobs at the same pace. Many people lost their jobs due to firm downsizing or closure and others formally still have a job but are not working and not paid.

As in other transition countries, joblessness has lead people to engage in subsistence agriculture or activities in the informal economy, very small/family businesses, undeclared or under-declared work of short duration or cyclical nature, activities at home, door-to-door, in the flea market or in other places. These are generally uncertain and precarious jobs, low paid, low skilled and deprive the individual from social rights such as future access to age or invalidity pension, and health insurance, and certainly do not fulfil health and safety at work requirements. Many people have no access to decent work.

Joblessness - in combination with the absence of social safety nets - has increased the levels of poverty in all the countries of the region. At the beginning of the 2000s the percentage of the population living below the national poverty lines was around 10% in Serbia and Montenegro, 19.5% in Bosnia and Herzegovina, 25.4% in Albania and 29.6% in the former Yugoslav Republic of Macedonia. Most of those people are low educated/low skilled: between 60-80% of all poor people fall in that category. They also have greater difficulties in coping with other adversities such as low economic activity where they live, which is often in rural areas, peri-urban areas, or former big industrial centres undergoing restructuring. Roma, internally displaced people (IDPs) and refugees, women and older people are also over-represented among the poor.

Poor people who have suffered most as a result of the recent economic developments and who, in their vast majority, are poorly educated and low skilled have also entered a vicious circle of further deskilling that worsens their chances of employment. Being unemployed or involved in informal or subsistence agriculture, they adopt a negative attitude to "normal" work and loose hope that they will ever have a "normal" job. In that sense they are also developing a "lifestyle" of accepting to act at the margins of the mainstream economy, labour market and society at large.

This paper is based on Anastasia Fetsi, ETF, Education and training for the social integration of disadvantaged groups in South Eastern Europe? Draft Chapter, ETF Yearbook 2006

Breaking the vicious circle through enhancing skills and employability

The main instruments that countries have at their disposal today in order to provide training and increase the skills and employability of the poor/low skilled adult people are the Public Employment Services (PES) and Active Labour Market Measures (ALMMs). Both of them are still weak in the way they are designed and function.

Limited capacities and resources

The services of the PES do not yet target those who need them most (as is the case in most EU member states). They are often overwhelmed in registering the unemployed and managing those registers rather than delivering services to their clients. The deployment of staff between administrative and front line tasks is often unbalanced. Furthermore, there is no time for the counsellors (who also lack the necessary expertise), to provide real assistance and activate "difficult" unemployed people. The ALMMs suffer from limited and volatile budgets while they are not necessarily targeted to the most needy. Although training is often one of the active measures it is rarely allocated a significant part of the already limited budget. The majority of funds are for wage subsidies which normally do not benefit the poor.

All in all, training opportunities for breaking the vicious circle and increasing the employability of the poor are limited. This approach is often justified by policy makers by the fact that since there are no jobs anyway there is no reason to invest in training and in particular not in the training of the lowest qualified. Although this argument may have its validity in a short-term perspective, it does not see the longer-term perspective of training as a vehicle for (re-)activating or (re-)empowering people who have become marginalised within the formal labour market.

Need for integrated approaches

Providing skills development to unemployed people who have remained long at the margins of the labour market needs appropriate design and combination with other active labour market measures. Training as part of an individual plan for re-integration in the labour market, such as currently experimented in Serbia, might have been a very good approach to create a virtuous circle.

The appropriate design of training concerns both its relevance for the local labour market and its relevance to the skills development needs of individuals. If training programmes seek to address the specific needs of the most needy they should integrate the enhancement of different sets of skills, including:

- Occupation related or technical skills which accommodate structural imbalances in the labour market and skill mismatches;
- Soft skills: motivation and attitude to work (very important for long-term unemployed people or those involved in the informal sector or occasional work) team work, problem solving, communication skills;
- Job search skills : important for redundant workers who have often worked their whole life in one job or enterprise, but also for new labour market entrants and long-term unemployed people;
- Entrepreneurship: not every unemployed person can become an entrepreneur. Often unemployed people choose this option because it is linked to access for start up funds. The scope of entrepreneurship training programmes is often limited to making a business plan and knowledge about regulations. It makes sense to enrich this with aspects of entrepreneurial behaviour such as taking initiative, self regulation and risk taking. In the context of the Western Balkans, also ideas for transforming informal and low added-value activities into formal higher added-value activities
- Career development skills through counselling and guidance.

Involvement of other stakeholders and local actors in partnership networks

The capacity of the PES is still small and it is practically impossible for it to bear the full burden of activation and skills enhancement of disadvantaged people. This may also be undesirable particularly in the most difficult cases where there is a need for long-term assistance to people in order to rebuild self confidence and trust in society or to overcome deep rooted negative attitudes. The mobilisation of local actors in the design and delivery of services through local partnerships or the development of local networks of service providers has provided good results to address this challenge in EU Member States and the candidate countries. Such measures and initiatives have often been funded from the European Social Fund (ESF).

Several EU funded CARDS projects and projects of other donors have built upon the concept of local networks in the Western Balkans. These projects have brought together local authorities, local employment offices, regional development agencies, training providers including vocational schools, and NGOs in order to provide assistance to people in disadvantaged areas. However, the projects have not always been targeted at the most needy even though they have tried to reach the long-term unemployed or disadvantaged young people, Roma or redundant workers from enterprise restructuring. The impact of these projects on the actual improvement of skills or the employability of people involved is not known. Generally there are no mechanisms to monitor the outcomes of such projects and if they do exist the results are not broadly disseminated.

Capacity and institution building for sustainability

Moreover, many projects have focused on the capacity building of local actors rather than on having an impact on the life of those involved in the projects. The big difference in the use of this approach in the EU Member States and the Western Balkans is that in the latter it is not yet used as part of a policy delivery mechanism but rather as an experiment and probably as a mechanism to fill the gaps in state policy to address skill needs and the problems faced by disadvantaged groups.

The longer term success of the local partnership approach in activating disadvantaged population groups relies on its institutionalisation as a policy delivery mechanism. Local actions need to be enabled and backed by appropriate legislative and institutional settings. These are important policy directions for the preparation of the Western Balkan countries in receiving EU pre-accession funds through ESF type funding mechanisms.

A challenge for the ETF

One of the major challenges for the ETF during the coming years will be to assist the countries of the Western Balkans in the process of accession to the EU.

There is a clear need to increase the awareness of national policy makers about the situation of disadvantaged people and their activation and inclusion into the formal labour market. This is one of the main pillars of both the European Employment Strategy and the European Social Agenda. The Employment Strategy speaks of an inclusive labour market, and the Social Agenda about social cohesion.

It also seems necessary to assist these countries in drawing upon the good experiences of EU Member States in terms of delivery mechanisms and institutional settings.

Questions

- How can the awareness and understanding of policy and implementation issues be increased?
- Can we learn from candidate countries?
- Can we learn from non accession countries?



FROM POVERTY REDUCTION TO ECONOMIC AND SOCIAL COHESION: HOW CAN COUNTRIES BE BETTER PREPARED FOR ESF TYPE OF INSTRUMENTS?

Arjen Deij, ETF, April 2006

Economic and social cohesion going beyond poverty reduction

Is there any need for skills development for poverty reduction in Europe?

Poverty is a common phenomenon in the countries that are now engaged in the enlargement process of the European Union. Close to one third of the populations are living in poverty today in South Eastern Europe and Asia Minor. With new countries joining the EU in different waves, the EU will also be integrating a less qualified work force compared to that which joined in 2004. The acceding countries share more similarities with the situation in Greece, Portugal and Spain when they became EU members in terms of infrastructure, administrative capacities, rural character, level of human development and poverty. The integration of the new countries into the EU will require special approaches taking into account their specific characteristics.

The new countries will also be joining a much more complex European Union in which education, training and employment policies are more pronounced. Discussions on these issues are now part of a process of open coordination, where countries work towards agreed objectives, report on progress and receive funds based on performance. With poorer countries joining, economic and social cohesion will be weaker than ever in the Community. More attention will have to be paid to address employment opportunities and education and training for target groups and the development of poorer regions. The structural funds will be instrumental in reducing these social and economic differences, and the European Social Fund (ESF) in particular, will have to play a key role.

Or skills development for economic and social cohesion?

Poverty reduction in development aid and economic and social cohesion policies within the European Union both aim at improving the quality of life in terms of income and employment for disadvantaged groups of the population. Whereas new style poverty reduction strategies include integrated measures including education and training to reduce poverty, the aim of economic and social cohesion in Europe is even more ambitious. Economic and social cohesion policies are designed to reduce the gap in income and employment between regions in the European Union and between the majority of the population and disadvantaged groups. While the objectives are more ambitious, the means available for economic and social cohesion are also much more generous. Skills development initiatives of a significant scale are combined with investments in infrastructure to create an enabling environment for local and regional development.

For the countries that have the perspective of joining the EU, economic and social cohesion will be the most important objective. Economic and social cohesion cannot be achieved without addressing the issue of human resource development. This will be particularly true for the New Member States, candidate countries and Western Balkans where the population is the most precious resource of the countries, in the absence of significant natural resources. Given the scarcity of public resources in the countries concerned, ESF, as the main European instrument for human capital development, will be an important catalyst in developing education, training and employment policies.

Lessons from the pre-accession process of New Member States

Focus on national policy development and planning processes

The Phare programme that was designed in the early nineties to support the economic reconstruction of the countries in transition changed its approach to support the accession process as soon as the decision for enlargement was taken. The programme for economic and social cohesion included measures to support regional development and human resources development. The acceding countries were also prepared for the European Employment Strategy (EES) and have started to get ready for the

This paper is based on Milena Corradini, Gerard Mayen and Arjen Deij, ETF, From poverty alleviation to economic and social cohesion: How can the future member states be better prepared for ESF? Draft Chapter, ETF Yearbook 2006

open method of coordination where each country identifies its priorities within the framework of the EES and reports on progress in dialogue with the Commission. The Joint Assessment Paper (JAP) on employment policies and measures looked at tax policies, social contributions, active and passive labour market measures, education and training policies, adult learning, the role of the public employment services and gender policies. The Joint Inclusion Memorandum provided an agreed assessment of inclusion measures for different target groups.

While national legislation developed to give greater importance to active labour market measures, the countries prepared their first National Action Plans for Employment (NAPE). To prepare the programming for the structural funds the first National Development Plans were drafted, including regional development plans and human resource (HR) strategies. The HR strategies were the prototypes for the first Sectoral Operational Programmes for human resources development, the planning tools for ESF. Technical assistance through Phare projects helped the countries to develop strategies, train administrators, and establish new structures. The ESF uses a bottom up approach to mobilise local stakeholders in partnership to address the specific local and regional human development aspects of sectoral and industrial restructuring and development, integration and reintegration measures and social inclusion measures. The countries launched their first grant HRD schemes to gain experience and prepare the ground for a pipeline of projects for ESF.

The ETF was involved in many ways in supporting these activities. We managed a Special Preparatory Programme, covering capacity building seminars and study visits to the EU for key stakeholders in the future member states. We also supported Labour Market Background Studies that were prepared by the countries as part of the consultation process between the Commission and the candidate countries. After the JAPs had been agreed and signed, ETF staff assisted by a team of international and local experts carried out studies on the contribution of the education and training system to employment, the role of adult learning, active labour market measures and the public employment services. The results were discussed with stakeholders in the countries and integrated in the JAP reporting process. We prepared project fiches providing different scenarios for the costs needed to support ESF, focusing on supporting education and training systems, the provision of active labour market measures, and continuing vocational training. The ETF also assisted in the design of HRD grant schemes. However, no real assessment of the impact of these contributions has been made since countries entered the European Union.

Less attention to capacity building for implementation

Studies commissioned separately by the Commission had however warned beforehand against overoptimistic expectations of the impact of accession on employment, predicting a migration of labour towards the old member states in search of better paid jobs, and indicating that the structural funds in the new member states would be handicapped by poor local implementation capacities and hence result in low absorption rates.

Some of the ex-ante evaluations of the sectoral operational programmes for human resources for the period 2004-06 seem to confirm these assumptions. They show for example, that while countries had made considerable progress in understanding the challenges for employment development, they were not always able to translate these into targeted measures, let alone identify achievement indicators, mobilise local stakeholders, and budget their programmes.

Moreover, one can see new measures appearing in the national programmes such as support to kindergartens, in Poland to address poverty among children in rural areas and preventative healthcare in Hungary to reduce the number of males leaving the labour market prematurely, because of self-destructive lifestyles. These programme components are only a minor part of the national ESF priorities, which follow normally more conventional patterns, but they are nevertheless indicative for a tendency to spread the ESF rather wide, which may indicate that the countries were not sufficiently prepared. Will new candidate countries be better prepared?

Romania and Bulgaria: more time, more experience?

Too little attention to capacity and institution building for implementation

Romania and Bulgaria, who are now preparing for accession, have profited from two and a half years of additional preparation time. This seems to have facilitated a better preparation. Romania started early by testing the ground with human resource grant schemes. Already from the 1998 Phare budget a grant scheme was launched, followed by new calls for applications from the 2000 Phare budget and since 2002 from each annual Phare budget. Implementation is about two years behind schedule but it still gives Romania a chance to experiment. Initial vocational education and training has received a large share of the pre-ESF support and it is expected that ESF will also be used in the future to make VET more responsive and more accessible to learners and actors on the labour market. Current VET reform aims at improving VET provision in the regions.

As part of the VET reform process, Romania has also started to improve regional planning processes for HRD, involving all key stakeholders. The JAP identified a number of critical areas for development and has been followed by national and thematic meetings to address employment policies, HRD and social inclusion measures. Extra efforts have been made to improve employment and labour market indicators. As in Bulgaria, the government developed a continuing training strategy for 2005-10 to improve participation and access and to raise its quality and relevance. The ETF has been directly involved in these developments. Moreover, the ETF has been building capacity to evaluate HR measures and support the involvement of social partners. This should enable social partners to lead regional partnerships supported by ESF addressing HRD for critical sectors, such as the machine building sector, food processing, construction including infrastructure, transport and tourism.

In Bulgaria there has been a strong focus on adult learning given the level of structural unemployment. A National Agency for Vocational Education and Training has been established that works in close cooperation with the Bulgarian Employment Services. Particular attention is paid to the quality of providers and regional training centres have been reinforced to obtain a better geographical coverage. Regional development and employment strategies have been developed in a number of regions, and capacity building has focused on the establishment of regional partnerships. The ETF has reinforced these actions with its institution building measures.

Both Romania and Bulgaria, however, lack strong local and regional structures on which to build partnerships. Although decentralisation has advanced both in the area of education and training and employment promotion, partnerships are not common and regional administrative structures practically absent. The existing implementation and evaluation capacities do not guarantee that policies are effectively translated in measures on the ground.

Next generation candidate countries risk to be equally ill-prepared

For the next waves of accession the Commission has prepared a single instrument for preparation the Instrument for Pre Accession (IPA). IPA incorporates all the countries for which accession is a perspective. However, the rules of the game are different for candidate countries and for prospective candidate countries. Prospective candidates are not participating in the open methods of coordination for employment and VET policies. This means that discussions on national strategies will only lead to a real dialogue at a later stage. Time to experiment and to improve and develop effective national, regional and sectoral consultation processes will be limited as well, as HRD grant schemes can not yet be funded.

While a lot of attention in the preparatory process is dedicated to improved policy-making, planning and programming capacities, there is a need to test ESF approaches on the ground to prepare for implementation. The ability to make the use of ESF efficient depends to a large extent on the understanding how available human resources at the local, regional, national and international level can be optimised to support development and growth. This requires more learning about what is happening before accession in the country and what has happened in other countries that have gone through similar experiences. These learning processes are only effective if they can adapt policies at local, regional, national and European levels. Could the ETF step in?

A new ETF role facilitating learning and developing policy learning?

The ETF's role in preparing countries for ESF has so far been mainly auxiliary to the Commission, the EC Delegations and national stakeholders, contributing to better policy development and planning processes. However, with the experience gained so far it is clear that this does not ensure a successful preparation for ESF. The increase in funds that come available after a country joins the EU regularly leads to resource driven rather than policy driven approaches. It is extremely difficult to connect the local and regional levels effectively with the national policy level. This requires time and interaction and learning more about what actually works on the ground and why. The context of each country is different and there are no ready made solutions that guarantee success.

HR policies need to be dynamic to respond to changing circumstances, with a national strategic framework with clear priorities. In order to employ the ESF effectively, learning systems need to be in place that allow for policy adjustment and policy development. This creates the need for a facilitator that understands HR in different contexts and can help countries to learn during the pre-accession period about what type of partnerships, measures and projects work for which target groups, and lead to sustainable results and structures.

Moreover, learning should not only be limited to what is happening in the country but should take into account relevant experiences in the old member states and especially in neighbouring countries that are going through the same process. This is a role par excellence for the ETF, with networks in the region including knowledge of the experience in the new member states. The ETF's role could be to facilitate policy learning, supporting initiatives and systems that make it possible to learn in order to adapt and develop policies and promote mutual learning between countries.

Questions for discussion?

1. How could theETF facilitate policy learning for ESF and poverty reduction, balancing policy development, planning and evaluation?
2. What lessons can be learned from the ESF preparatory process that can be used in countries that are not offered an accession perspective?
3. Which elements of ESF could be adopted to enrich poverty reduction strategies?



SKILLS DEVELOPMENT FOR POVERTY REDUCTION AND VOCATIONAL EDUCATION AND TRAINING SYSTEM REFORM IN CENTRAL ASIA

Henrik Faudel, ETF, April 2006

Introduction

During the Soviet period, vocational education and training organisations had a dual role. They provided the planned economy with skills and also took on broader welfare and social functions for young people. During the transition period vocational schools have struggled with the skills dimension and their social role has become more prominent. As a result vocational schools have increasingly become schools for children from poor families. This focus on a 'poverty reduction' role is less a choice than a consequence of the difficulty in responding to the skills requirements within a changing labour market. However, rather than helping young people to develop relevant skills to escape or avoid poverty, the lack of relevance and quality may have the adverse effect and risks keeping people in poverty.

The reform of the vocational education and training system has not been given a high priority, either by governments or the donor community. Innovation in ways of identifying and responding to skills needs takes place largely outside the formal system. Many innovative local skills development initiatives have been implemented by NGOs. However, these projects have been donor driven and are donor dependent. They have also remained isolated and have not had an impact on the vocational education and training system nationally. It will be a challenge to find ways to connect (innovative) local initiatives with systemic national reform and thus create better conditions for giving skills development a positive role in poverty reduction.

In Central Asia, donor assistance will be vital for the implementation of national reform. It is therefore essential that vocational education and training system reform be identified as a priority area within the Poverty Reduction Strategy Papers. Better use of donor funding is crucial to enable the development of vocational education and training reforms which are capable of responding to the skills development needs of the population and the emerging labour markets. They should fit the national contexts and ask for commitment and involvement of national stakeholders themselves.

Need for systemic reforms

Central Asian countries inherited large vocational education and training systems which supplied skills for employment within the logic of the Soviet labour market. The main components of the system were initial skills development through the different parts of the formal vocational education system and company based continued skills development of the labour force. This system was an integral part of the manpower planning system designed for a centrally planned economy. Its purpose was to supply mass industrial and agricultural enterprises with large numbers of semi-skilled workers and mid-level technicians. Vocational and technical schools were spread over the whole country and the majority of primary school leavers used to enter this part of the education system even though many aspired not to. Already before the transition basic vocational schools had developed a bad reputation but for many families there was no other choice.

This system has collapsed with the transition to a market economy. Enterprises that the vocational education and training programmes and schools used to serve collapsed and emerging labour markets required new kinds of skills and knowledge. Families, at least those who could afford to, made use of the new freedom of educational choice. Government budgets, in some countries that were traditionally dependent on transfers from Moscow, were no longer able to maintain the existing infrastructure of vocational and technical schools. As a result of long periods of neglect much of the infrastructure was of poor quality and out of date. In Tajikistan, during the civil war following independence a large part of the infrastructure was destroyed. As a result, even more than before, vocational schools have become the education institutions for children whose families could not afford to send them elsewhere.

While some countries have been able to invest in modernising education and training facilities, three essential questions remain largely unaddressed. What kinds of skills are needed, and how and for whom should they be developed. The new labour market no longer requires the narrow job-specific skills relevant in the previous planned system. Employment opportunities have dwindled with the collapse of industrial firms and the privatisation of farms. Rural areas have been particularly hard hit and a large informal sector with a precarious employment situation has developed. In the absence of job guarantees, people need skills which combine a variety of life skills such as analytical, negotiation, empowerment, and legal rights skills with technical and enterprise skills whether for paid or self-employment. This means that the focus cannot only be on the needs of the large enterprises of the past,

but must focus on people who need to adapt flexibly to creating their own employment as self-employed workers, to working in micro and small enterprises or in modernised large enterprises all requiring different skills.

In a context of increased poverty, people from poor families have become particularly dependent on vocational education and training. However, rather than helping young people and adults to develop relevant skills to escape or avoid poverty, the lack of relevance and quality may have the adverse effect and risks keeping people in poverty. A reform of vocational education and training is therefore urgently needed.

The VET systems have remained highly centralised and standardised with schools at the local level not able to actively engage in developing more relevant education and training. In order to understand how and what kind of skills and knowledge are needed, and for which target groups they can be developed, vocational education and training organisations must open up to the local environment in which they operate. Opening up schools can also help in the development of the necessary experience and expertise to inform national vocational education and training reform.

Donor driven innovation

Innovation in skills development has taken place but primarily outside the existing system and in a dispersed manner. A number of local and rural development initiatives have been undertaken in Central Asia to address increased poverty. ETF research shows that such projects have typically focused on new types of skills such as empowerment of the population, community development and micro-business start-up support, but have almost never included vocational or technical knowledge and skills. The initiatives have typically relied on donor funding, and been implemented by NGOs whose activities have often come to a halt once the donor project came to an end. Sustainable local capacity to assess skills needs, training needs and carry out different types of skills training has not been developed.

Existing local vocational training institutions have rarely been considered as potential partners, either for the promotion of new kinds of skills or for promoting technical skills more in line with their traditional domain. At the same time, vocational schools have not felt compelled to seek engagement in this type of initiative. There are still considerable gaps between civic society and formal institutions. The innovation which has taken place has therefore not had any impact on the behaviour of key stakeholders in the system nor has it been able to inform policy makers involved in vocational education and training system reform debates.

Connecting local skills development initiatives to vocational education and training system reform

The challenge that countries are facing is how to learn from the different skills development initiatives which take place at the local level to help inform national vocational education and training reform. The learning is relevant both at the level of the schools and for the national level.

The schools could learn about why and how to enter and maintain local partnerships with NGOs, rural advisory services, local authorities, employers and individuals to develop new solutions in line with changing skills needs. New solutions refer to the type of skills and to how they should be developed in order to better respond to the learning needs of particular groups, and to the new roles of vocational education and training organisations in this skills development process.

Central authorities could learn how to connect the initiatives at local level to national systemic reform. The learning would relate to defining new roles and responsibilities for vocational education and training organisations, to reviewing the regulatory framework to provide an enabling framework rather than a prohibitive one, and to developing support capacities to help schools come to terms with their new and enlarged role.

A key aspect is how to open up vocational education and training organisations to the local environment in which they operate and to make this happen throughout the system. Opening up schools would make it easier to identify and respond to the changing needs of the labour market and individuals. It would enable schools to link up with other - often innovative - initiatives at the local level. It would also improve

the conditions for making so far isolated and donor dependent local development initiatives more sustainable by integrating these into wider institutional policy frameworks.

Donors and ETF

Kyrgyzstan, Tajikistan and Uzbekistan have or are in the process of developing Poverty Reduction Strategy Papers (PRSPs). In the first generation PRSPs in Kyrgyzstan and Tajikistan, skills development was not included as a priority. The approach of the international organisations involved in the development of the PRSPs did not encourage the countries to include the issue as a priority. But also the countries themselves did not see skills development as a key issue as key stakeholders in the system have been happy to persuade themselves that the demand for skills rather than the supply of skills was the problem.

However, given the limited resources available at national level, donor support remains a prerequisite for implementing vocational education and training system reform in Central Asia. In order to ensure donor support, skills development needs to be integrated into the PRSPs as a priority. At the same time, many donor funded initiatives have remained relatively unsuccessful or at best at the isolated project level. Systemic impact has been rare. Just as the countries themselves have not linked vocational education and training system reform to poverty reduction schemes, donors have also tended to support system reform in isolation from other projects aimed at reducing poverty. Though skills development may at times have been included in poverty reduction schemes, it has hardly ever been linked to national system reform.

The ETF may play a key role to remedy this situation through policy learning. We can show policy makers in Central Asia how different countries have approached the need to realign and reform vocational education and training systems in a context of poverty reduction. Such lessons include the advantages of opening up vocational education and training organisations and empowering them to create local partnerships. On the basis of local partnerships, capacities could be improved to identify new and changing skills needs in the community and develop innovative and flexible training responses. But the lessons also include a growing awareness that solutions cannot only be found at the local level. They need support and commitment from national stakeholders for the development of an overall enabling environment for schools to provide their contribution to poverty reduction.

Open questions

- How can we create an enabling environment which encourages vocational education and training organisations to open up to the local environment such as rural advisory services, NGOs, local authorities, regional development authorities, employers and individuals?
- How can we ensure that local and rural development initiatives aiming broadly at poverty reduction are connected to national vocational education and training system reform debates?
- Which policy learning initiatives could the ETF undertake to enable each country to make choices which fit their situation and provide answers as to how to provide skills development for poverty reduction?



PEER REVIEWS AND PEER LEARNING: OPTIONS FOR POLICY LEARNING FOR POVERTY REDUCTION STRATEGIES?

Arjen Vos, ETF, April 2006

Learning matters

Within Europe, policy makers are increasingly looking across the borders, seeking information, examples of good practice and policy or peer advice in order to launch, develop or implement new policies in their national context. One way of developing awareness on the importance of skills development for poverty reduction is to let policy makers see, talk to and hear from people who are or have been involved in developing the skills of poor people as a tool for reducing their poverty.

Peer reviews and peer learning are among the instruments for engaging policy makers in policy learning. ETF experience in South Eastern Europe is that the peer learning process is perhaps a more effective learning tool than the final report of a peer review exercise, which risks ending up in the drawer together with lots of other reports.

ETF experience

The ETF initiated a first round of peer reviews in 2002 and 2003 in 10 countries of South Eastern Europe¹. The main idea was that the peer reviewers would learn as peers while at the same time policy makers from the country under review would learn from the analysis and recommendations produced by the peers. The ETF approach to peer reviews could perhaps be considered as both a combination of the traditional peer review and more modern peer learning, and also as something of a transitional approach, away from an expert-driven knowledge-transfer model towards participatory forms of policy learning.

High levels of individual peer learning

The combination of capacity building and policy advice objectives has appeared to be too ambitious. The peers often had diverse backgrounds in terms of expertise and functions and have often not been in similar policy making positions in their countries. In addition, some peers came from South Eastern Europe, while the majority came from the 'old' and 'new' Member States. It was difficult to establish a joint learning process among these mixed teams. The peer review has been evaluated as highly successful in terms of personal capacity building and broadening of the perspectives of the peers involved, but the impact on national policy making has been very limited.

Low impact of peer review recommendations

Although the peer review reports have been well received by most countries and the analysis and recommendations have been endorsed by the key stakeholders, the impact on policy development has, in most cases, been insignificant. This may be attributed to the time gap between the peer review visits and the finalisation of the reports or to the quality or appropriateness of the recommendations, but most other expert reports can be evaluated in a similar way.

The ETF peer review external evaluators concluded that a wider ownership of the peer review would increase the chances of the effective use of the policy recommendations. They also stressed the importance of follow up activities to support the implementation of the recommendations. In a few cases the peer reviews have played an important role in defining new EU projects or elements have entered

¹ The objectives were:

- to provide an external assessment of VET reform policy initiatives to national policy makers
- to improve mutual knowledge and understanding of VET systems, issues and developments
- to promote regional networking, exchange of experience and cooperation among VET experts, stakeholders and policymakers
- to increase awareness and facilitate the transfer of VET reform experience from EU Member States and candidate countries
- to contribute to the EU aid programming cycle
- to intensify cooperation between the ETF and national authorities/experts from the region.

This paper is based on Peter Grootings, Søren Nielsen, Margareta Nikolovska and Arjen Vos, ETF, Peer review and peer learning: Incompatible or complementary approaches to facilitate policy learning? Draft Chapter, ETF Yearbook 2006

into new legislation, such as in Bulgaria and Bosnia and Herzegovina, but these are the exceptions to the rule.

Will a comparative approach be more effective?

In 2005, the ETF organised a regional peer review on the implementation of curriculum reforms. The second review was primarily concerned with the question of why, despite so much international assistance, so little national curriculum reform was taking place. The peers, all from the region, were curriculum development experts but did not all have a background in policy development. They also acted as national coordinators for the study visits to their countries. An EU expert facilitated the work of the teams.

A comparative synthesis report was produced, with regional and country specific recommendations. It is too early to assess the impact of this review. The lack of policymaking experience has been a major disadvantage of this exercise. The final report in particular contributes to cross-country comparison as a tool for policy learning. The question is how much the policy makers will use the recommendations of the report.

Or should we engage policy makers as peers?

Policymakers everywhere in the world “take action” only when there is a problem and when there is wide dissatisfaction with existing policies. In the context of VET reforms, policymakers in transition countries have to try to solve ‘ill-structured’ problems in an environment with complex stakeholder relationships. Even when we assume that the policymakers know what they would like to achieve, there is considerable uncertainty about how to achieve it. It is important to understand the contextual limitations of policies and the ability to transform these into policies that will work at home. For policymakers therefore, perhaps even more so than for other learners, learning is more than merely a cognitive process: learning is practice.

Context and conditions for effective policy learning

The reconstruction of ETF experiences with peer review and peer learning has shown that the initial considerations and argumentations sought to combine process and outcome based approaches but that this was not easily achieved in practice. The positive dimension of this experience is that it was one of the first attempts to introduce peer learning as an approach to policy development. Since 2005, this peer learning approach has also been a key instrument in the EU education and training discussions². The EU has also agreed on the need to focus on policy makers and policy priorities.

In conclusion, the analysis of recent ETF experiences leads us to conclude that peer reviews and peer learning, under certain conditions, provide a powerful learning environment for individuals to increase their awareness and understanding of critical policy issues. The learning effect in terms of awareness-raising is probably the biggest during pre-policy preparation phases but peer reviews may also have strong learning effects at later stages of the process for developing measures that seek to implement policies, as well as for their monitoring.

The biggest learning impact of peer learning activities has been for those directly involved in the process. The learning impact for peers has been huge and, as a vehicle for common policy learning, the peer learning review approach has been valuable.

However, neither peer reviews nor peer learning can achieve these individual learning effects to have an impact on the policy process if they are organised as isolated, stand-alone events. In order for the learning that has taken place during peer reviews to play a role in the policy process, peer reviews need

² As a follow-up to the EU Ministerial Conference on “A Europe of skills: let’s do the job!” in Maastricht in December 2004, the European Commission has strengthened support to the implementation of the Lisbon objectives at national level through the introduction of peer learning. The Commission defines this as “a process of cooperation at European level, whereby ‘reform agents’ from one country learn, through direct contact and practical cooperation, from the experiences of their counterparts elsewhere in Europe in implementing reforms of shared interests and concern”. It aims at mutual learning and contributing to the European area of education and training.

to be embedded in a more comprehensive policy learning strategy that includes a series of complementary knowledge sharing and policy learning activities.

Questions for discussion

1. Would the instruments of peer reviews or peer learning be useful for the regional discussions about poverty reduction?
2. Which one is better at this stage of policy development? How could they be implemented in the regional context? Who should be involved?
3. How can a policy learning platform be created in real decision-making contexts that gives clear policy options for decision-makers?



FACILITATING POLICY LEARNING: ACTIVE LEARNING AND THE REFORM OF EDUCATION SYSTEMS IN TRANSITION COUNTRIES

Peter Grootings, April 2006

Outline

This paper explores the opportunities for applying active or new learning principles for education reforms in transition countries. There are four aspects to be considered: the first concerns the question “why” these new principles have any relevance at all. The second aspect is about the implications of new learning for “what” education reforms should cover. The third relates to the process of education reform itself and in particular to “how” reform policies are developed and implemented. A fourth aspect, typical for all active learning approaches, is about the tensions and contradictions between the “how” and the “what” when trying to implement active learning. The paper will discuss these different aspects but will focus in particular on how international assistance, such as that provided by agencies such as the European Training Foundation, can better contribute to the sustainable reform of national education systems¹.

Introduction

Multilateral and bilateral donor agencies increasingly issue declarations that refer to the need to contextualise knowledge and secure ownership of development policies by involving local policymakers and other stakeholders in policy development and implementation². Yet policy transfer through imposing or copying (selective knowledge about) policies and models taken from other contexts still dominates the day-to-day operational practices of the donor community (King, 2005; King and McGrath, 2004; Grootings, ETF, 2004; Ellerman, 2005).

Development agencies and their staff normally act as classical school teachers who have the right knowledge and know best what has to be done. True knowledge just needs to be transferred to (or made accessible for) partners who don't know the truth (yet) and partners should implement measures that are presented to them as best practice. Local policymakers and local stakeholders are regarded as passive knowledge and instruction receivers who do not possess any relevant prior knowledge and experience. Development or reform is seen as a process of social engineering that will be successful if technically properly managed. In reality, most reform projects are short-lived because they do not fit in context and there is no local ownership. Reforms are often not sustainable. On the contrary, they tend to come and go with the donors and their agencies.

One reason for the gap between declaration and actual behaviour is a particular – some would say erroneous – understanding, often only implicit, of why and how people learn and develop new knowledge and expertise³. The standard assumption underlying most traditional learning approaches is that someone (of course the donor representative) possesses the right knowledge and learners who do not have this knowledge (of course the local policymakers and other stakeholders) should simply listen carefully and then do what they have learned.

Carrots and sticks are available in many variations to provide the incentives to make learners listen and do what their teachers tell them to do. However carrots can be attractive in their own right and sticks not always hurt so they often fail to motivate learning. The donor's truth has not necessarily been heard (or not properly understood as the donor would argue) nor has it led to the desired and foreseen action (due to lack of “political will” or – more positively – insufficient capacities as donors would conclude).

New learning theories, instead, argue that learners are more successful in acquiring, digesting, applying and retrieving new knowledge when they have been actively engaged in these processes. Facilitating

¹ The European Training Foundation (ETF) is the European Union's Centre of Expertise supporting vocational education and training reform in third countries in the context of the EU external relations programmes. For details www.etf.europa.eu

² Most recently also the World Bank, which announced an overhaul of its guidelines for policy-based lending (From Adjustment lending to Development Policy lending) in August 2004, in recognition of the fact that there is no one blueprint for reform that will work and that therefore governments must take ownership of reforms to develop a programme that the country needs. While this apparently puts lending governments in the driving seat, to use a classical development aid expression, governments are still not asked whether they wish to sit in the car at all. See also King 2005.

³ There are many other reasons of course and some of these may be even more important – at least in the short term – such as the fact that policy assistance is usually part of a large financial aid package and accepting and implementing policy advice is part of the conditions for receiving these funds. But even when conditions disappear the policy transfer approach risks remaining dominant.

active policy learning rather than policy transfer may therefore have better chances to contribute to sustainable reformed systems⁴.

Section 1 will summarise briefly what active or new learning is about. It will also indicate wider implications of active learning for formal education systems, informal learning and the roles and responsibilities of main stakeholders, in particular teachers and learners. Section 2 will present the systemic nature of education reforms in transition countries and the role that international donors play in assisting such reforms. Section 3 will introduce the concept of policy learning as a translation of the principles of active learning to the field of reform policy assistance. Section 4 will present some practical implications and contradictions of the policy learning concept. It will argue for a different role for donor agencies and consultants based on similarities between the roles of teachers and policy advisers in facilitating learning. Section 5 will suggest that knowledge sharing should be an integral aspect of policy learning.

1. Active learning

Engaging students in successful learning has always been a key problem for educationalists since the development of formal education systems that provided standardised school-based education programmes which were obligatory to attend. Some teachers manage to survive the system and some students as well but many do not. There has been talk about bad systems, bad schools, bad teachers, bad learning environments and bad students. Sometimes attention was simply focused on the good students only whereas the bad ones were left on their own or were given shelter in special lower rated forms of education and training. In many countries vocational education and training has been the second – or last – choice for students who failed the “route royale”. Hence there have always been debates about causes, consequences and possible solutions. In looking for solutions countries have increasingly tried to borrow from more successful countries.

The policy debates have been coloured by the dominant understanding of why, what, where and how people learn and how people can be motivated to learn at all. The traditional behaviourist and cognitive approaches on which much of the standardised (formal and non-formal) education has been based have assumed that learning is basically a steady accumulation of discrete entities of knowledge and skills that can be presented to learners as if filling empty vessels⁵. Hager (2005) has pointed at five further assumptions that follow from this understanding of learning:

- There is one best way of learning
- Learning is essentially an individual activity
- Learning which is non-transparent is inferior
- Learning centres on the stable and enduring
- Learning is replicable

In contrast, by seeing learning as a continuous – and highly selective process of exchange between individuals and their environment – constructivist approaches argue that people give their own meaning to information. They do so based on what they already know and framed by how they have become accustomed to seeing the world around them. They select and retain what is relevant for them. In doing so they construct their own understanding of reality as a basis to intervene and act. Different people therefore may give different interpretations to the same thing, may retain different aspects and may act differently on the basis of the same information.

Constructivists also argue that there are many ways through which people can learn apart from someone else passing on pieces of expert knowledge (Verloop and Lowyck, 2003); that learning is foremost a social activity (Lave and Wenger, 1991; Wenger, 1998); that there is a lot of tacit learning taking place which is not easily to be categorised and demonstrated but which is there when needed (Schön, 1983); that learning is dynamic and very much context-bound and that good learning therefore

⁴ Others would argue that good governance, participation of civic society, fight against corruption and sound legal frameworks are more important. This paper will simply pay attention to the learning aspect which has been neglected so far.

⁵ See Driscoll 2000 for a critical presentation of these various learning theories.

depends on meaningful learning environments (Kolb, 1984; Simons et al., 2000). In combination these insights are now known as new learning or active learning. While there are currently many attempts to introduce - often on an ad-hoc basis - active learning techniques in traditional education settings, a more holistic active learning approach has developed into something like a new paradigm. Based on the principles of active learning, several countries, including the Netherlands, are now reforming parts of their public education systems.

Obviously, much of what is now receiving attention as new learning has been around for years in the writings of school innovators such as Dewey, Montessori, Froebel, Steiner, Freinet and others and has been practised in schools that are based on their pedagogical approaches. Until recently, attempts that combined different learning outcomes and alternative ways of learning have remained marginal to mainstream education and training. Most public education became characterised by the single model of expert teachers and trainers passing on their knowledge and skills bit-by-bit to pupils and students who knew nothing or at least not enough.

The emergence of an increased interest for the new learning paradigm during the 1990s is the combined result of fundamental changes occurring in the labour market which have done away with employment security and have created a need for lifelong learning⁶. On the other hand, new insights and research resulting from a whole range of disciplines that deal with the question of how people learn and retain new information, have provided scientific support for a different understanding of learning⁷. These developments coincide with the importance given to specific criteria for learning outcomes, attention to alternative ways of achieving these learning outcomes and developing instructional models that teachers and trainers may apply when organising learning processes. The new learning approaches give a more active role to learners in managing and shaping their own learning processes based on the understanding that good learning cannot be achieved when learners remain passive receivers of information and instructions.

The active learning paradigm stresses the need for new criteria and new kinds of learning outcomes. For reasons of employability in a world characterised by fast changing job requirements and growing insecurity, learning outcomes should not just be more relevant at a given moment but they should be durable, flexible, meaningful, generalisable and application-oriented (Simons et al., 2000). These criteria could also easily refer to traditional kinds of learning outcomes in particular if one is concerned about propositional knowledge and technical skills and their transferability in time and context.

New kinds of learning outcomes have become important as well. These include the ability to learn, think, collaborate and regulate. People should be able to adapt quickly to changing situations, be able to cope well with continuing uncertainty, and know where and how to find the information that they need to deal with the challenges of their work and life situation⁸. Such regulative or meta-learning outcomes have also become important given the sheer amount of new information that is becoming available at ever-faster speed with new generations of information and communication technologies. This makes it more relevant to consider what people can do with information instead of having the information available as such (Simons et al., 2000).

The need to cope with new (social or key) competences has been a major drive behind curriculum and education reform in many countries since the early 1990s. But while initially these reforms concentrated on the new "what" as additions to existing curricula and standard approaches, it is now increasingly understood that traditional ways of organising learning are unable to deal with these new learning insights and requirements⁹. The key issues in education discussions currently therefore are not so much about the "what" but about the "how" questions: how can new learning outcomes be achieved and how is it possible to ensure that learning outcomes comply with the new criteria?

⁶ OECD, 1996. Moreover, declining public budgets have also contributed to attempts to make education more efficient and effective and neo-liberal policy agendas on the left and the right have placed the responsible and autonomous citizen back on stage again. Changes in the organisation of work within companies also build on responsible workers able to foresee and prevent rather than to react ex-post or too late. The overall economic and political climate of the 1990s has been very receptive for active learning insights. Active learning is more than a scientific approach to learning.

⁷ These include, besides psychology and educational science (Driscoll 2000) also brain research (OECD 2002).

⁸ These are also called social or key competences.

⁹ In many Anglo-Saxon countries education reform has in fact taken the form of establishing an assessment system that could measure learning outcomes assuming that these could be the result of very different learning processes and arguing subsequently that the nature of these learning processes therefore would not be relevant at all. The black box approach to learning has been a typical characteristic of economist approaches of education and training.

From the side of educational sciences, attention for new learning outcomes follows from a better understanding about how experience and information is represented in memory and about the kind of learning activities that learners apply. Three different ways of representation are normally distinguished: Episodic representations are based on personal, situated and affective experiences. Conceptual or semantic representations refer to concepts and principles and their definitions, while action representations refer to what can be done with episodic and semantic information. People differ in terms of their preferred modes of representation. Because conceptual and semantic forms of representation have traditionally been regarded of a higher (intellectual) order, theoretical knowledge has been seen as more important than practical knowledge and learning with the head as superior to learning with the hands.

The traditional curriculum therefore consisted of (unrelated) theoretical subjects plus – in vocational streams – practice periods to apply such theoretical knowledge. For modern educationalists, however, good learning outcomes mean rich and complex memory representations whereby there are strong interrelated connections between the different ways of representation. They also argue that these connections can start from any of the three different modes of representation. Some people master theory by starting with practical problems while others may be more successful when learning the other way around (Simons et al., 2000; Driscoll, 2000; Pieters and Verschaffel, 2003).

As mentioned earlier, a reformulation of expected learning outcomes is only part of the story. For educational professionals, the key question is how they can promote new learning outcomes through organising appropriate learning processes and developing instructional strategies. The new learning theories argue that learners are more successful in acquiring, digesting, applying and retrieving new knowledge, skills and attitudes when they have been actively engaged in these processes. Active involvement, cooperation with other learners and realistic contexts also help to increase the motivation to learn which in turn makes it easier for people to take responsibility for their learning into their own hands. In combining all this, active learning therefore provides strong learning environments and produces good learning outcomes. The search is now to develop operational approaches to make active learning principles work in practice¹⁰.

Active learning also implies considerable changes in the roles that teachers and students play in education. With the growing attention towards active learning, there is a shift of responsibility from the teacher to the learner. The teacher becomes more an organiser and facilitator of learning processes than the transmitter of expert knowledge or skills whereas the learner is asked to actively participate in identifying learning needs and in managing the process of acquiring new knowledge. Teachers and trainers still need good knowledge and skills in technical domains but the ways how to make these accessible for learners change. Teachers have to be able to identify what learners already know and how they learn best and then guide them to find the information that can increase their knowledge further. In terms of structure of the education system, active learning insights give strong arguments for creating open and flexible pathways in education, providing a rich variety of learning environments, and recognising prior and informal learning outcomes (Kok, 2003; Simons et al., 2001; Driscoll, 2000; Verloop and Lodewijck, 2003; Grootings and Nielsen, ETF, 2005; OECD, 2005).

This new understanding of learning has considerable implications for the organisation of formal education (structures and contents), for informal and non-formal learning (recognition and validation) and the role of policymakers, teachers, students and other stakeholders in education. The active learning paradigm is of relevance for any learning situation where people seek to acquire new knowledge and understanding in order to be able to act competently in a changing context. In the following section I will explore what active learning means for policymakers in transition countries when faced with reforming their education and training systems.

2. Education reforms in transition countries as learning processes

Transition countries are very diverse and different but have all in common that they are undergoing a fundamental change of their main societal institutions, including the system of education. They are seeking to change from centralised authoritarian societies with some form of state planned economy towards more democratic societies with a market based economy. For that reason they can be called

¹⁰ See the various contributions in Simons et al. 2001 for an account of experiences from different domains.

transition countries. However, contrary to the way the term transition has been used so often, nobody really knows a priori where the transition will lead to. There are perhaps general characteristics of democratic market based economies but there are no blue prints that countries simply can apply.

All modern market economies differ in important aspects from each other and none of them resembles the textbook case. What will come out of the reform process in each transition country will depend to a large extent on how local policymakers and other stakeholders will manage to use the resources that their countries have built up in the past, including the inherited physical and human infrastructures of their education systems (Grootings, ETF, 2004). Transition countries differ from developing countries in the sense that they used to have well-established and – at the time – effective and successful education systems. These have become impoverished as a result of continued underfunding and have increasingly lost relevance for a new labour market context: the issue is reforming and transforming obsolete systems rather than building new ones from scratch.

The reforms in transition countries are *systemic* as they imply changes that are both *system-wide* and *system-deep*. Reforms are system-wide, in the sense that they require changes in all aspects of the institutional arrangements of the countries. For education and training this means that all the building blocks of the education system need to be reviewed and revised: from delivery, provision, assessment, funding, quality assurance, administration and governance up to research and development. But changes are also system-deep since they require the development of new relations between education and training, on the one hand, and other changing institutions in society, on the other. In transition countries these are in particular the relations between schools, the labour market and private enterprises. This asks for fundamentally new definitions of the roles of the main stakeholders in education and training as well as for changes of established working routines of education and training organisations.

These are complicated processes as all these other institutions are undergoing systemic changes as well. Vocational schools, for example, have now to educate and train for open and uncertain labour markets and no longer for agreed numbers and jobs in hosting companies that were basically interested in hoarding labour. However, in most countries labour markets are still under development and private sectors only gradually emerging. Teachers who have always been told how many students they would have and what they should teach them are suddenly in a situation where there is nobody anymore to tell them anything. Developing new roles and relationships is for individuals essentially a process of learning new knowledge, skills and attitudes in order to become competent in a changing context. Reforming a national education system is a collective learning process of all stakeholders (Grootings, 1993).

A major challenge for transition countries facing systemic reforms of their vocational education and training systems is to build up and strengthen their own capacities to formulate reform policies, not just capacities to implement imposed or borrowed policies. Reforms of vocational education and training in transition countries (and indeed any kind of major reform in any country) will only be successful and sustainable if policy development, formulation and implementation are firmly based on broad ownership and fit within existing institutions. The concept of policy learning reflects this understanding. Policy learning emphasises not just the involvement but the active engagement of national stakeholders in developing their own policy solutions. It is based on the understanding that there are no universally valid models that can simply be transferred or copied from one context into another. At most there is a wealth of international but context-specific experience in dealing with similar policy issues that can be shared¹¹.

The discussions about new learning are relevant for education and training reforms in transition countries. They provide key criteria for successful reform and reform assistance. Education reform can only be sustainable if reform policies are owned by local stakeholders and are embedded in the context of the country. Education reform is really about stakeholders being motivated to learning new ways of how to organise education and training systems: system wide and system deep. Learning is about developing new roles for all stakeholders at all levels in all the building blocks of the system. The challenge for donors and aid agencies therefore is not to sell prefab “what” solutions but to find the appropriate answer to the question “How to help people help themselves?” (Ellerman, 2004 and 2005)¹².

¹¹ See ETF Yearbook 2004 for a longer discussion about the ETF’s vision and its role to foster and support policy learning among its partners.

¹² Ellerman, 2005, has summarised this challenge into three Dos (Starting from Present Institutions; Seeing the World through the Eyes of the Client; Respecting the Autonomy of the Doers) and two Don’ts (Don’t Override Self-Help Capacity with Social Engineering and Don’t Undercut Self-Help Capacity with Benevolent Aid)

3. Policy reform is policy learning

Applying active learning insights to a review of vocational education and training (VET) reform experiences in transition countries further supports the need to think in terms of policy learning¹³.

The review indicates first of all that VET reforms in transition countries have often heavily depended on the presence and contribution of international donors. There is a mix of positive and less positive experiences. Especially in initial phases of transition but sometimes also long after, donors have played a key role in developing awareness of the need for VET reforms, influencing the reform policy agenda and providing resources for strategy development and implementation. Often, however, donors or their experts in the field have showed little knowledge of specific national transition contexts and no understanding of the knowledge, experience, views and expectations of people involved in education and training. Very often they have also entered the partner countries with standardised one-fits-all packages of assistance. Capacity building was usually focused on developing appropriate capacities to implement what donors thought would be necessary.

In turn, many national policymakers, certainly in the initial stages of transition but sometimes also long after, were more interested in receiving funding than in policy making. They were convinced that the key problem was the impoverished state of their educational infrastructures. Moreover, they have often been unable to assess the fitness of donors' proposals for best practice for the institutional context of their own VET systems.

This combination of donor and recipient expectations and behaviour has created problems of sustainability of many donor-supported reform initiatives. With the departure of the donor the reform usually came to a halt. With the limited resources that donors can make available practically nowhere system wide changes had been started anyway. Much of the earlier assistance to VET reform in the partner countries was guided by principles of policy copying and policy taking. The guiding principle on the donor side seems to have often been: we know your future and your past is irrelevant. Because international assistance has underestimated the relevance of the institutional context, policy copying and policy taking has not contributed to system-deep VET reforms either. Stakeholders and policymakers in transition countries have not been able to learn much about their new roles in a changing VET system although they may sometimes have become experts on the systems of other countries.

We may not know the details of future VET systems in partner countries but from the international experience some of the basic characteristics that modern VET systems should develop have become increasingly clear: they should be decentralised, responsive to labour markets and learner needs, transparent, well resourced, provide flexible and open pathways for young people and adults, and have a capacity to innovate and adapt to changing conditions. All modern VET systems around the world are trying to become like that. But there is no best practice of how to organise such systems, neither in developed market economies nor in transition countries. There are many good - and perhaps also a couple of bad - context-bound practice examples. Moreover, good practice examples not only refer to what countries wanted to achieve in their reforms but also to how they have tried to change their systems. How can good use be made of such knowledge and experience about policy objectives and strategies if policy copying and policy taking do not work?

The following example may further illustrate the challenges. The policy learning approach requires an intensified focus on how to organise policy learning platforms and environments in the countries so that a critical mass of key actors and stakeholders gradually develop VET reform policy understanding and competence. So far, since policy transfer and policy copying approaches have been dominant in the reform debates in most countries, the concept of stakeholders has been very much influenced by the model – and indeed ideology that was taken to be transferred or copied. In vocational education and training reform a key issue is the involvement of employers, private industry, or – in EU language – social partners. The view is that in a market-based economy, governments cannot continue to be the sole responsible authorities for vocational education and training. The essence of systemic reform – adaptation of vocational education and training to free educational choice, private enterprise and labour markets – requires the involvement of enterprises where graduates will have to find employment.

The reality of the reform process in many transition countries, however, has created a whole series of interesting contradictions. Whereas private sector or social partner involvement was presented as a

¹³ What follows is a summary of more detailed reviews in Grootings 2004.

conditio sine qua non for any market-based vocational education and training system, in practice governments have faced a huge problem of disinterest from the side of the private sector (employers and unions alike) to be involved at all. There are many reasons that can explain this situation but one is the lack of representative organisations at national level. Another is the absence of any professional capacity among social partners to deal with vocational education and training matters in a reform context. The result was, and often still is, that enlightened governments have to include the interests of the private sector into their own policy thinking and reform policy remains dependent on a few political reform champions also because of the absence of a professional civil servant community inside or an educational support infrastructure outside the ministry apparatus.

Public education authorities in transition countries therefore remain the driving force behind vocational education and training reform, certainly at national level. The involvement of stakeholders representing industry is not something that can be built on from the start but that has to be developed as part of the reform process itself. Interestingly enough, if trade unions have been involved at all in national education reform policy debates, these have often been teachers unions and understandingly – given the state of public budgets and mounting pressures to decrease public spending on education in many transition countries these have been more oriented at defending the social and material status of their membership than engaging in contents of education reform. As a result, teachers, also through their unions' behaviour, have become regarded generally as major obstacles for reform. This, in turn, may sometimes even have led to the development of policies that sought to break the power of the teacher and trainer community instead of engaging them more positively¹⁴.

More recently, however, there is an increasing awareness that teachers and trainers should be included among the critical mass of stakeholders for reform. This is most of all the result of a better understanding of why so many education reforms all over the world have gone wrong in the past. Exclusion of teachers as stakeholders from the reform process has frequently led to national reform policies failing to trigger any changes at all inside education institutions and classrooms. Teachers and trainers have now become recognised as crucial agents for making reforms work in their professional capacity of organisers of learning.

It has also been understood that involving teachers is not just a matter of informing them so they know what is expected from them. Nor is this only a matter of training so that they know how the new policies have to be implemented. As professionals, teachers principally know best what will work in the specific context of their own school and classroom environment, including responding to the particular learning needs of the student population that they have to cater for. Their expertise therefore is an important source for translating general policy initiatives into very divergent real life contexts. A better understanding of why many education reforms have not worked therefore not only has implications for the implementation of reform policies but impacts on the very process of policy development and formulation.

This, in turn, reflects the fact that the current reforms in vocational education and training are very complex development processes that hardly compare to the traditional reform conceptions with their clear stages of preparation, formulation, implementation and evaluation. This is especially true for reforms in transition countries that seek to combine systemic reforms with structural changes and modernisation of contents and approaches. Such reforms are not one-off social engineering events designed by external experts but ongoing change processes set within a broadly agreed reform agenda.

The reform agenda can be quite radical but requires further operational detailing, based on local innovation processes. It is because of this that teachers who are actively engaged in local innovation and experimentation are an important source of expertise for national policymakers and that reform strategies have to build on engaging teachers and trainers working inside their school organisations. Such an understanding of reform puts policy learning, capacity building and policy advice at both national and school-levels in a new perspective and at the same time with considerably more urgency than before¹⁵. Traditional top-down or bottom-up strategies have become too simplistic and are

¹⁴ Such as through moving from so called input control (based amongst others on teacher qualifications) towards output control mechanisms based on occupational and educational standards with neglect of the educational and learning processes that would lead to achieving the standards. In such cases, the assessment of standard attainment has frequently replaced education and training as such.

¹⁵ Experience from some countries such as the Netherlands also points at the need for additional coordinating and support institutions at the sector, regional or school-type level. Such is the role that associations of secondary and higher vocational schools, on the one hand, and sector-based expertise centres are playing. Specialised local, regional and national research and development institutions in turn support these. In other words, reform, innovation or development infrastructures require more than national stakeholders and teachers in schools.

insufficient to make reforms work. Policy learning as a process requires a continuous interaction and dialogue between national and local partners, vertically, as well as among the various local initiatives horizontally.

4. Facilitating policy learning in practice

A policy learning approach may be the appropriate response to some of the key challenges related to the VET reform process in transition countries. Policymakers and other key stakeholders should be enabled to learn to develop their own policies. But in practice there are considerable obstacles for facilitating policy learning. These stem from the many tensions between “what” and “how” in the relationship between experts and novices. Several of these obstacles are known from the search for operational approaches to make active learning work in classical education settings¹⁶. However, others are particular to the field of reform policy development.

Understanding of context-boundness or institutional fit is not easy and it is a challenge that both local policymakers and international advisers share. While donors usually do not have a good understanding of local context (they often even do not speak the language), it can also not simply be assumed that local policymakers understand the characteristics of their own VET system. It is difficult to question what has always been normal and the rule.

Moreover, international consultants do not always understand that the advice they provide is perhaps firmly rooted in the institutional context that they come from themselves and they are often not well informed about policies and systems from other countries. How can local policymakers assess the fitness of what is sold to them as the latest international trend? How can international advisers properly assess prior knowledge and contextualisation of new knowledge? Policymakers are also under stress to come up with solutions quickly. Their political mandate does not leave them much time. Advisers are bound by the financial and time resources that the donors have reserved for their projects. Also the ownership issue raises some problems especially when this is restricted to a few cooperative national policymakers and – simply because of the design of the donor project – leaves out the vast majority of teachers and trainers in schools (Grootings and Nielsen (eds.), 2005). How can international advisers facilitate learning under such conditions?

The basic assumption underlying the concept of policy learning is not so much that policies can be learned but that actual policies are learned policies. Learning is not simply the transfer of expert knowledge or behaviour from one person to another but rather the acquisition of understanding and competence through participation in learning processes. However, policymakers are not only policy learners. They also have to act, and acting on the political scene, especially in environments that are undergoing radical change such as in transition countries, does not always leave a lot of space and time for careful and gradual learning. They have to engage in daily political decision making and, depending on their position in the system, active engagement in political power struggles may often take priority¹⁷.

On the other hand, policymakers engaged in systemic reforms are in need of new knowledge which very often contradicts with established knowledge and routines. For policymakers therefore, because they are under pressure to act, learning is more than merely a cognitive process: learning is practice. Their learning is situated learning as it is an integral and inseparable aspect of their social practice. Lave and Wenger (1990) argue that all learning is situated learning and more particularly “legitimate peripheral participation in communities of practice”. Novice learners learn best when they are engaged in a community of more expert learners; during the learning process they become more competent themselves and move from the margin to the centre.

Policymakers in transition countries can be regarded as highly motivated novice learners and policy learning can be facilitated by letting them participate in relevant communities of practice (Wenger 1998). Such communities of practice could be created by bringing together policymakers from different countries that have gone through or are undergoing reforms of their education systems. International and local policy analysts, researchers, advisers and other practitioners could be part of such communities as well.

¹⁶ The key issue remains as to how a learning situation can be established where the expert acts as a learning process facilitator and the novice can be stimulated to actively engage in learning.

¹⁷ The issue of active learning in a lateral and vertical power context needs further reflection.

However, policymakers in transition countries may be seen as “novices” in terms of knowledge and expertise concerning the development of modern educational systems in market economies but they are also “experts” as far as their own country context is concerned. Similarly, international policy advisers may perhaps be the “experts” with respect to educational policymaking in developed economies but they are often “novices” in terms of knowledge about the particular context of the partner country. Neither local stakeholders nor international advisers really know what “fits” with regard to modern education policy in a partner country’s context.

The community of practice concept therefore needs to be further developed to properly take into account these differences in learning experience and high levels of uncertainty. Since old and new knowledge relate to different contexts there are different peripheries and centres and even those who are closer to the centre remain learners themselves.

5. Policy learning through knowledge sharing

Reforming education and training systems in transition countries implies combining old and new knowledge in changing contexts for both local stakeholders and international advisers. Policy learning is not just about learning the policies that other countries have developed but rather about learning which policies can be developed locally by reflecting on the relevance of other countries’ policies for the situation at home. Policy learning in this sense can only happen when there is information and knowledge available and shared. The principal role of donors would be to enable a reform policy learning process by providing access to such information and experience and by facilitating a critical reflection on their relevance. However, donors and their staff cannot do their learning facilitation role well if they don’t recognise that they themselves are also learners in the same policy learning process.

VET reform policy development seen as VET policy learning would have to use knowledge sharing to enable decision makers from partner countries to learn from – and not simply about – VET reform experiences from elsewhere for the formulation and the implementation of their own reform objectives. Knowledge sharing would also enable donors and international advisers to better understand the institutional context and history of the partner country. For them, in becoming familiar with local knowledge it will also be easier to appreciate and value the expertise that partners bring into the reform process.

International donors and their policy advisers would have to take a role similar to the one a modern teacher is supposed to play: not that of the expert who knows it all and simply passes on existing knowledge but the one that recognises problems, does not know the solutions yet, organises and guides knowledge sharing and in so doing develops new knowledge for all involved in the learning process. Policy learning therefore can only happen in partnership.

In policy learning partnerships, the timing and sequencing of knowledge sharing is of major importance if donor assistance is to have a real impact on local ownership and contextual fit, and if it is to create the necessary motivation, commitment and capacities to sustain reforms. This would ask specific competences from policy advisers as they have to be able to judge where they themselves and their partners are in moving from the periphery to the centre of the community of practice. It would also require a rethinking of the classical development instruments such as workshops, study visits, technical assistance, pilot projects and so on with a view of developing strong learning environments for policy learning to happen.

Policy learning is sharing experience from the past to develop knowledge for the future. It is also about sharing knowledge from abroad and knowledge that is locally produced and therefore about developing new knowledge as well. It contributes not only to creating more coherent system-wide reforms that fit but also facilitates system-deep reforms of VET systems as it enables all stakeholders to learn new roles and develop new working routines. It will be a challenging task to develop concrete approaches that can make policy learning which is based on principles of active learning theory work in practice.

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