

CROSS COUNTRY REPORT

**Summary and analysis of the feedback
from the candidate countries on the
Commission's Memorandum on
lifelong learning**

November 2001



European Training Foundation



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The European Training Foundation is an agency of the European Union which works in the field of vocational education and training in Central and Eastern Europe, the New Independent States, Mongolia and the Mediterranean partner countries and territories. The Foundation also provides technical assistance to the European Commission for the Tempus Programme.

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Foreword

The European Commission asked for this paper to be prepared. It analyses reports from candidate countries on the consultation process concerning the Memorandum on lifelong learning.

The main paper, elements of which form part of one of the supporting documents to the communication from the European Commission "Making a European Area of Lifelong Learning a Reality", comprises:

- 1) key findings arising from the consultation process;
- 2) a summary of the action proposals in the national reports alongside each of the key messages in the Memorandum.

After the main part of the paper, there are two annexes:

- The first comprises 12 documents, one for each country. These assess the organisation of the consultation process. They also analyse the main issues, challenges and proposals presented in the country reports.
- The second annex is an analytical overview of the action proposals together with examples of good practice from the country reports.

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Introduction

The following comments aim to clarify issues arising from the consultation process on the Memorandum on lifelong learning in the candidate countries. They also focus on the context in which the process took place.

- The consultation on the Memorandum on lifelong learning was proposed to the candidate countries as an optional exercise by the European Commission. Despite this, all the countries involved (Estonia, Latvia, Lithuania, Poland, Slovakia, Czech Republic, Slovenia, Hungary, Romania, Bulgaria, Malta and Cyprus) carried it out and submitted a report on time, including the three countries that did not get a grant from the European Commission for this purpose.
- The process was carried out in many ways. In some countries, it was an inter-services consultation at inter-ministerial level; in others, it was a broad, in-depth exercise involving social partners and regions. Thus, social partners and relevant non-governmental organisations were not systematically involved, and the regional dimension was rarely considered. However, in most cases, the ministries of education of the countries involved took the consultation very seriously. They set up specific steering committees, placed the Memorandum on the website, and set up a range of workshops, conferences and an Internet forum. The result was an excellent basis for wide and lively national debate.
- In addition to the main ministries and relevant institutions, the process sometimes reached the highest level of the state such as the State Presidency. This confirms the Ministry of Education's intention to use the Memorandum as a way of raising the importance of education and training issues in the country, advance reforms and obtain resources.
- The reports vary widely in quality. While all the countries endorse the main ideas in the Memorandum on Lifelong Learning, they adopt various approaches to them. Some countries take most of the sub-themes linked to each key message very seriously; others simply make general comments on the main points. In general, the level of information and comment reflects the extent to which the candidate countries are aware of lifelong learning issues. The reports also give a good indication of the priority attached to human resources development and to related discussions in the countries concerned. In some countries, the role played by the National Observatories¹ in co-ordinating or drafting the reports was particularly worthwhile.
- The different proposals and viewpoints in the reports take the form of "unified national opinions". With very few exceptions, they do not refer to different opinions, which stakeholders may have expressed in discussions. This may be due to the centralised approach that still characterises the national administrations of the candidate countries.
- Only five countries come up with ideas on indicators. That said, many countries suggest prioritising the issue of indicators and benchmarking as areas for future European support and co-operation.

1 The National Observatories comprises a network of national institutions set up in all candidate countries with the European Training Foundation support. Their main task is to gather, analyse and disseminate information on vocational education and training policies and activities.

1. Consultation process on lifelong learning: key findings

This chapter is based on information provided by the country reports. It also takes into account knowledge acquired by the European Training Foundation concerning recent developments in human resources in candidate countries.

The understanding of lifelong learning relates closely to the ways in which the state must adapt the formal education system - with clear priority going to adult education.

- Generally speaking, people have yet to appreciate learning as a lifelong process. Most countries see formal education as the foundation for a lifelong learning strategy. Hence, the need to tackle the inadequacies of the existing education system before putting the principle of lifelong learning into practice. In most cases, specific stress is put on adult education and the need for formal education to enable people to generate professional skills or search for personal development. However, little attention is paid to ways of acquiring job skills and informal forms of learning. Up to a point, the priority given to formal and adult education also reflects the way in which some countries set up the consultation process.
- The principle of key actors - in particular, the state, companies, and individuals - is generally accepted. However, it is usually largely up to the state to create appropriate conditions for promoting lifelong learning. In a few countries, social partners have traditionally been committed to developing human resources. The potential role of enterprises, individuals or other actors in promoting action under the six messages is generally underexploited and not sufficiently highlighted in most reports. Here there is a difference between Malta and Cyprus and the other countries as the former have a longer tradition of social partners involvement in human resources development and can build on it more sophisticated strategies.
- Most reports stress the importance of eLearning and information and communication technology. They also analyse these factors in relation to the six key messages², and highlight recent key initiatives as undertaken by most of the countries.

There is a significant lack of coherent and integrated lifelong learning strategies. While the consultation process has served as a stimulus, the support of the European Union is needed to develop the strategies properly.

- The organisation of the consultation process has often prompted separate discussions on each key message. Everyone endorses the need to develop an inclusive framework, involving all those concerned and taking account of the results of the separate discussions.
- Despite the requests emanating from the Feira European Council, the countries lack coherent strategies and practical measures to foster lifelong learning for everyone. Nevertheless, these reports refer to on-going debates in the candidate countries on some key issues related to lifelong learning and they often provide interesting inputs for further development of relevant strategies.

2 New basic skills for all; more investment in human resources; innovation in teaching and learning; valuing learning; rethinking guidance and counselling; bringing learning closer to home.

- Most countries have completed or are completing various policy papers on lifelong learning priorities and perspectives. These include national action plans for employment, joint assessment papers for employment policy, some education acts for children and adults, draft laws and specific white papers. However, some countries have identified the need to develop specific lifelong learning strategies and action plans, and have used the consultation process to prepare accordingly.
- In effect, the consultation process has made an impact on the debates about education issues and the impetus originally generated by the ministries of education. The process may well help to speed reforms especially within adult education. Some countries celebrated the Year of Lifelong Learning in 1996 and used it to launch the debate and initiate actions. Moreover, the 2001 process spurred on reforms. The Memorandum was disseminated and discussions between various participants set up.

Along with inherited cultural patterns, systematic difficulties at both social and economic levels in most countries slow down the development of human resources and the preparation for the knowledge society. Economic restructuring has yet to take place, administrative co-ordination needs improving and the idea of a 'partnership culture' has to be promoted. The lack of motivation is a major problem. Appropriate lifelong learning strategies must deal with these transversal challenges which cut across the key messages of the Memorandum.

- The reports stress the lack of information throughout the countries on the main messages and challenges concerning lifelong learning, the knowledge economy and society - and also on examples of good practices available in the European Union.
- There is also a general lack of motivation. This is particularly damaging when it encompasses teachers, employers, administrators, and, even worse, learners. In most countries, individuals tend to adopt a passive approach. They still fail to grasp that learning can help them to develop their careers and possibly raise their incomes. They find it even harder to appreciate the fact that learning can prevent social marginalisation or exclusion.
- The administrative structures and culture of co-operation are not well advanced. Vertical (or sectoral) ways of distributing responsibilities still prevail, hampering the implementation of integrated strategies. Inter-ministerial co-ordination is poor, in particular between the ministries of education and labour. Decentralisation is at a very early stage in most countries - indeed, it is sometimes still in draft form. Regional and local participants are only now starting to assume their new responsibilities and their capacity to involve relevant partners, co-ordinate efforts and design and implement lifelong learning initiatives, is still very limited. This is evident from the lack of proposals for action at regional and local level in most reports.
- Furthermore, with a few exceptions, the partnership culture is insufficiently developed. Hence, the limited involvement of social partners in the development of human resources and employers giving scant attention to the training needs of employees and to education issues in general.
- Many reports stress the lack of overall legislation to help develop continuing vocational education and training. Provision of such training does not fulfil the needs of companies and individuals. In most countries, responsibility for adult education goes to the Ministry of Education and this serves to reinforce the focus on the formal system.
- The formal system is still rigid. Despite many projects and programmes initiated by the European Union and other donors, curricula are not in modules, and there is little interplay between paths of learning. Participation in higher education is often low, a factor that contradicts the aims of lifelong learning.

- The status and training of teachers have yet to adapt to changes as requested by the learner-centred approach. In most countries, their social status is now low compared to those from other employment categories, or compared to the situation in the European Union. The best qualified teachers often leave the profession for better paid work in private companies or abroad. In addition, in contrast to the European Union, there is a shortage of the newly qualified intermediary professionals for training throughout schools, universities, non-governmental organisations and companies. This applies to people such as training designers, counsellors, managers, evaluators and mentors.
- In general, the lack of resources at state level and the inefficient use of existing resources combine to hamper the development of appropriate initiatives. On the one hand, secondary schools often lack the modern equipment necessary to provide students with skills vital to industrial development, whilst companies are not prepared to invest in new apprenticeship schemes. In some countries, economic difficulties are affecting or postponing the implementation of important measures to further the aims of lifelong learning.
- The emergence or development of some new sectors, especially the information and communication technology one, demonstrates a continuing surge of modernisation. Despite this, it should be noted that the switch to a fully-fledged market economy or restructured industrial economy - for example, closing or redeveloping mining and heavy industries - is still incomplete and, in some cases, has barely started. It follows that messages about the knowledge economy and society are harder to put across.

A range of good practices already exists in relation to every key message, particularly in the most advanced countries.

- The reports mention many actions or projects that relate to the key messages of the Memorandum. However, these are usually isolated and small scale. They are also sometimes funded through European Union programmes with little reference to sustainability, and have limited impact. They also tend to relate to only one aspect of the Memorandum, and are not properly integrated with overall lifelong learning.
- Nevertheless, there are some relevant and interesting practices in many of the more advanced countries. These relate to the six key messages as follows:
 - **Key message 1: “second chance” training initiatives for school leavers and drop-outs** in Cyprus and Slovenia; national programme for **social and economic integration of the Roma population**, which includes basic skills, in Bulgaria; the Lithuanian Junior Achievement Programme dealing with **entrepreneurship training for secondary school students**; the “Tiger Leap” project in Estonia that **equipped schools with a new information and communication technology infrastructure**.
 - **Key message 2: support for in-company training** from the Vocational Training Fund in Hungary; the **setting up of a human resources development agency** in Cyprus (since 1979).
 - **Key message 3: modularisation of curricula** for adults in formal education according to the new Polish law; development of **schools as open training centres** in Malta.
 - **Key message 4: promotion of systems for accreditation of prior learning** in Slovenia.
 - **Key message 5: development of network of diagnostic centres** in the Czech Republic.
 - **Key message 6: development of self-directed learning centres** in Slovenia; establishment of an **Adult Education Centre** in the Pedagogical Academy in Latvia.

- In addition, some reports contain references to laws in preparation or some projects already proposed for Phare financing. These are more ambitious, and try to cover lifelong learning challenges in a more integrated, strategic way.
- There are also some interesting initiatives developed at university level. These focus on eLearning and open and distance learning.

Most of the proposals cover the first, third and fifth key messages, as they refer to continuing reforms of the formal system, with priority going to adult education and a major role for the state. In most cases, these represent general ideas or priorities to be tackled rather than concrete proposals for action. Development of basic skills, including the traditional ones; innovation in teaching and learning mainly through eLearning developments; rethinking of counselling and guidance; and opening up of schools to wider publics are very well accepted. Reflections on the rights and responsibilities of individuals, involvement of businesses, supporting measures for training in small and medium-sized enterprises, and the assessment of non-formal and informal learning are still at an early stage.

- The first message “new basic skills for all”, the third message “innovation in teaching and learning” and the fifth message “rethinking counselling and guidance” have been analysed in more depth and have attracted the most specific proposals. These assume that the main focus is on the formal system when dealing with adult education as expressed above. They also assume experience acquired through a number of activities undertaken in the fields of reforming curricula. These activities include the introduction of new skills; the modernisation of teacher training; and the development of counselling and guidance in all countries. Usually, these have the support of Phare, the World Bank or other donors through pilot activities without proper dissemination.

- As regards **key message 1**:

- ✓ Priority goes to overall reforms in the formal system by promoting the development of learner-oriented approaches; promoting flexible curricula, including basic skills in the curricula; adapting the preparation of teachers, administrators and other principals. Many countries stress that specific standards for basic skills should be refined.
- ✓ General support goes to widening the role of schools or developing new forms of schools or lifelong learning centres that can embrace new target groups. This is often a sound way to deal with needs in the countryside.
- ✓ On the other hand, few people like the idea of sharing responsibilities in the delivery of basic skills with the likes of businesses, non-governmental organisations, families and individuals. Also, only three reports deal with the issue of an individual right for all citizens to lifelong learning.
- ✓ The development of specific actions to prevent or address the “digital divide” commands high priority in many countries. The main proposals relate to: exploiting the role of libraries to promote computer literacy; increasing access to the Internet through schools and open public places; raising the motivation of older people to use new learning technologies.

- As regards **key message 2**:

- ✓ The importance of the public budget as a source of financial contributions and incentives to promote investment is still dominant. In addition, many countries give priority to ensuring the efficient use of resources through adequate monitoring. The role of social partners and their co-operation with the state in creating an appropriate framework of incentives attracts scant attention. However, some reports refer to the reluctance of employers to develop human resources, and insist on the need to devise flexible arrangements to raise the interest of workers in lifelong learning.

- ✓ Much support goes to individually oriented approaches (individual learning accounts, purpose-linked subsidies, financial loans, etc.) instead of more traditional fund-type approaches. However, there is no significant experience of this so far and the need for better information and more expertise is stressed.
- ✓ Some reports stress the importance of developing in-service training in companies together with adequate support.
- As regards **key message 3**:
 - ✓ The reports show strong adherence to the wider objectives of this key message. Most countries place more stress on developing new ways to accommodate adults and to prepare for self-learning.
 - ✓ There is great emphasis on the role of learning and distance learning in this respect. Candidate countries have recently developed many activities in these fields, mainly in higher education institutions. Some countries raise the issue of quality assurance arrangements as regards materials and processes.
- As regards **key message 4**:
 - ✓ The state of reflections in this area is at an early stage. In particular, they refer to which diplomas or qualifications are relevant when assessing competencies or skills developed in the non-formal or informal sectors. Most countries prefer to rely on qualifications from the Ministry of Education, and to develop modularised curricula accordingly. However, other countries are considering more specific and diversified approaches. Here again, the countries must increase their know-how.
- As regards **key message 5**:
 - ✓ There is marked agreement amongst the countries here. They believe that related developments in this field help individuals to understand the challenges they face, prompting thoughts on career development and also reducing social exclusion and marginalisation. Of course, this entails co-ordination between various participants and institutions likewise and the establishment of appropriate databases and other tools.
- As regards **key message 6**:
 - ✓ The reports mostly agree on the sixth message. This stresses the need to optimise existing resources before trying to find additional funding. This should be done by mobilising schools, universities and other training institutions. It should also channel museums, libraries and cultural centres into an integrated approach towards human resources development at regional level and through appropriate partnerships. It must also exploit information and communication technology-based learning tools. To achieve these ends, the institutions concerned must develop their staff accordingly.

The European Union is expected to support the development of concrete lifelong learning strategies and actions in the candidate countries. To this end, it must open structural funds for them; invite them to join existing committees and networks; launch new initiatives; and set up a proper dissemination of good practices.

There is a variety of proposals or expectations expressed towards the European Union. The following have to be mentioned in particular:

- to make the **best use of the EU programmes** in developing lifelong learning approaches;
- to enable the countries concerned to benefit as soon as possible from Structural Funds, especially those from the European Social Fund, to train administrative staff;
- to help develop national strategies by regularly pooling the experiences of experts, managers, teachers, trainers and others concerning lifelong learning at European level;
- to promote comparative analysis and/or research on different approaches to lifelong learning within the European Union, in the candidate countries and beyond;
- to benefit from the dissemination of this information through publications, statistics, databases, workshops and conferences. Issues include motivation measures for lifelong learning, evaluation of quality in adult training, evaluation of assessment and recognition instruments;
- to support the establishment of a European database on employment and learning opportunities and to benefit from rules and guidelines to develop the database at national level;
- to get European Union support for training staff involved in institutions that provide adult training and counselling;
- to develop standards for “new basic skills”, for quality guidelines for non-formal and adult education, and for monitoring the collection, evaluation and dissemination of information and communication technology-based teaching;
- to see the Commission’s new initiatives as a way of promoting the development of “social and active citizenship”, of evaluating the quality of training, of setting up an “adult portfolio”, or opening an European Union education portal on Internet;
- to participate in the proposed working groups or specific European Union committees that aim to monitor developments in lifelong learning;
- to develop, in close co-operation with the Commission, joint assessment papers on lifelong learning, along the lines of the Joint Assessment Papers on Employment Policy;
- to gain support from the European Centre for the Development of Vocational Training (Cedefop) and the European Training Foundation as noted in some reports.

Several reports criticise various issues on the grounds that they have not been sufficiently covered by the Memorandum or require a different approach.

Here are the main critical points:

- A serious reserve is expressed as regards the limitations of the “new basic skills” definition and a proposal is made to adopt a more comprehensive definition by continuing to pay due attention to traditional basic skills.
- Appropriate stress should go to the effectiveness and efficiency of education and training in terms of financing and results and to learning as a social act. Individuals taking charge of their own learning must not mean that the state is no longer responsible for the quality of both initial and adult education.

- There must be a balance between the personal and social and the industrial and vocational aspects of lifelong learning, given the worldwide social changes that affect most central European countries.
- Stress on computer technology should avoid making learning an isolated, individual activity. The interaction between teacher and learner is the key to dynamic learning whereby knowledge is constantly created and recreated.
- Increasing the motivation for learning is the task of education and employment policy and of wider social policy measures.
- More priority must go to problems and measures concerning disabled and disadvantaged people.
- The juxtaposition between formal and non-formal or informal learning processes is questionable as it does not concede that these are often integrated within a single process (e.g. informal learning takes place in tandem with formal education within one education institution).

General conclusions

- The consultation process on the Memorandum on lifelong learning has, through the country reports, revealed the extent to which various actors are involved and the results of their discussions. It has contributed usefully to the continuing national debates on the shift towards the knowledge economy and society and the need to put more stress on human resources.
- The results are consistent with the issues analysed and the priorities for reform in the vocational education and training systems as identified by the European Training Foundation in the different reports sent to the European Commission. That is continuing training has not been given proper consideration until now; institution development is still an important issue at national and, even more, at regional and local level; social partners' involvement in vocational education and training issues is still very weak in almost all countries.
- Nevertheless, the consultation process revealed an awareness of the main challenges and obstacles on the part of stakeholders, social partners, regional bodies and others. It also revealed a shift towards more active policies in the form of new laws, white papers on lifelong learning and the implementation of significant initiatives. While adult education is a more limited concept than lifelong learning), the former can still be seen as an interesting starting point as it allows to enlarge the perspective to issues of non-formal and informal education. It also shows that social partners and the individuals should take more responsibility.
- Candidate countries in Central and Eastern Europe need lifelong learning and, in particular, an integrated approach to it. That said, an awareness of the significant differences between them and the European Union countries is necessary. The former are still evolving into a modern market economy or developing their economy. They also still have to cope with important cultural and social challenges, often inherited from the past. While some segments of the economy are very well developed, the conditions under which they will develop lifelong learning policies are very different from those in European Union countries and they will be harder to implement.
- The debate must continue and policies for each country must be prepared. Interesting proposals emerged during the consultation process, some at national level, some at European Union level. Most of them were fairly general, and need further refinement at both country and cross-country levels, but can be then integrated into national action plans. In this respect, the Communication on lifelong learning prepared by the European Commission would be an important breakthrough for the candidate countries and they must now stay closely associated with the next steps of this European Union process. In addition, the Joint Assessment Papers of Employment Policy, as jointly prepared and monitored by the European Commission and the country representatives, can also further lifelong learning in candidate countries over the coming months.

2. Summary of action proposals for each key message

Key message 1: new basic skills for all

Proposals for action at national level

- The most specific proposals concern reforming the learning approaches in formal education; adapting teachers and trainers to their new tasks; extending the role of schools, and preventing or addressing the digital divide. In this sense, the cross-references to the issues raised and the proposals under key message 3 are numerous.
- Several countries (Cyprus, Estonia, Lithuania, Malta, Slovakia, Slovenia) link the delivery of basic skills to the development of new learner-oriented systems. The core of their proposals regard: the flexibility and openness of curricula; adapting content and methods to specific situations and the needs of target groups; identifying and building on the learners' existing knowledge and skills; stimulating self-directed types of learning.
- Almost half of the countries (Bulgaria, Cyprus, Latvia, Malta, Slovenia) underline the importance of preparing teachers and trainers for the delivery of basic skills. They also stress the importance of basic skills when training the teachers and administrators themselves as well as retraining them to teach adults. Two reports propose that retired teachers be recalled to provide training on basic skills.
- Some countries (Cyprus, Hungary, Latvia) refer to developing national programmes or standards for basic skills (with specific curricula, materials, evaluation arrangements).
- The importance of widening the schools' role or developing new forms of them often appears (Estonia, Latvia, Lithuania, Malta) through proposals to: let everyone have access to schools in formal education; develop lifelong learning centres; create special types of schools (residential schools) for socially disadvantaged students.
- The development of specific actions to prevent or address the "digital divide" scores high priority in many countries (Czech Republic, Estonia, Hungary, Lithuania, and Slovakia). The main proposals relate to: exploiting the role of libraries to promote computer literacy; enabling access to the Internet through schools and open public places; raising the motivation of older people to use new learning technologies.
- A significant number of countries (Cyprus, Hungary, Lithuania, Malta, Slovakia) stress that basic skills be defined as comprehensively as possible. On the other hand, this definition should also reflect the countries' cultural and socio-economic differences. Two countries (Cyprus, Estonia) explicitly refer to the shared responsibility of the public, private and third sectors (Government, non-governmental organisations, families, individuals) when promoting the teaching of basic skills.

- Addressing regional disparities in accessing learning gets priority only twice (Estonia, Romania). This also goes for proposals that businesses should promote training in basic skills (Hungary, Romania).
- The right of every citizen to lifelong learning also appears in only a few reports (Hungary, Malta, Slovakia).

Proposals for action at European level

- Development of a European initiative to promote the development of social and active citizenship skills (Lithuania).
- Setting up a working group to help develop a way to define new basic skills (Bulgaria).

Indicators

Five countries (Bulgaria, Cyprus, Czech Republic, Hungary, and Lithuania) present long lists in which most of the proposed indicators relate to key message 1.

Key message 2: more investment in human resources

Proposals for action at national level

- The principle of spreading the responsibility amongst the state, businesses and individuals for increasing the investment in human resources is generally acknowledged. However, in practice, the public budget is still seen as a central source of financial contributions and incentives to promote investment.
- There is a general tendency to favour individual-oriented measures (individual learning accounts, purpose-linked subsidies, financial loans, etc.) instead of the more traditional fund-type approaches. Some countries (Cyprus, Estonia, Lithuania, Slovakia) moot the creation of specific financial budgets that would make learning activities accessible to target groups at risk (e.g. people of low education, the elderly or those lacking the necessary resources for training).
- A number of countries (Estonia, Czech Republic, Slovakia) give priority to ensuring the efficient use of resources through monitoring mechanisms, setting up partnerships at local level, and improved co-ordination between different line ministries.
- Several countries (Estonia, Latvia, Poland) acknowledge the need to reinforce in-company training or related forms of professional development. Here, the stress is on categories that will initiate, implement or monitor training activities (managers, instructors and mentors). The issue of specific support measures towards the employees in small and medium-sized businesses crops up in one report (Hungary).
- There are only a few references to developing an information policy or practices to encourage investment in learning (Latvia, Poland and Slovakia).
- Little attention goes to the role of social partners and their cooperation with the state in creating incentives to promote lifelong learning. Some reports (Bulgaria, Cyprus, Estonia, Hungary, Malta) reveal an awareness of the need to stimulate the workers' interest in lifelong learning (flexible working time, status more closely linked to their qualifications).

Proposals for action at European level

- Many countries recognise the relevance of the European level to promote comparative studies on various topics (motivation measures for lifelong learning, evaluation of the quality of learning), as well as further conceptual or statistical work (Cyprus, Czech Republic, Estonia and Malta).
- There are equally concrete proposals for European initiatives: European competition on best practices of investment in human resources (Lithuania); scheme of exchange learning and teaching credits (Malta).
- Finally, two countries (Poland, Slovakia) state they need help to prepare for future participation in the Structural Funds.

Indicators

Proposals presented by the five aforementioned countries under key message 1.

Key message 3: innovation in teaching and learning

Proposals for action at national level

- The reports show the countries adhere to the wider objectives of this key message.
- Shifting from traditional learning approaches to a learning approach based on interaction and stimulating participation and self-instruction is a shared priority.
- Significantly, most countries place more emphasis on developing innovative methods and the context for adult learning. One country (Lithuania) stresses the contribution of applied educational research in this process.
- The core issues that appear most often in the proposals of several countries (Bulgaria, Czech Republic, Hungary, Lithuania, Slovakia) are: the promotion of modular training; the development of self-managed forms of learning; and the role of eLearning and distance learning in this respect. Special attention also goes to quality assurance arrangements as regards information and communication technology-based educational materials and processes (Czech Republic).
- Preparing teachers and trainers to play radically different roles (facilitator, advisor, “researcher-practitioner”) in the context of lifelong learning is the key issue across most of the countries. In addition to the suggestions made in key message 1, reports focus on the particular need to adapt the qualifications of adult trainers, school leaders and all educators in the broad sense subsequently variously engaged in lifelong learning.
- In this chapter, the more focused proposals include: co-ordinated training of information and communication technology specialists and adult teachers; learning at work for both students and educators; preparatory and in-service courses for adult trainers and educators that teach pedagogical skills appropriate for adult learners; and the management of schools as community learning centres.
- Setting up procedures to monitor the quality of adult education is also a key priority for some countries (Poland, Slovakia).

Proposals for action at European level

Some countries need European support for:

- developing quality guidelines and benchmarks for the non-formal adult education sector (Bulgaria, Estonia, Lithuania, Poland, Slovakia);
- setting up monitoring for the collection, evaluation and dissemination of information and communication technology-based pedagogies (Hungary);
- the continuing education of staff in institutions that provide adult training and counselling – this should be one of the priorities of European programmes (Czech and Slovak Republics, Estonia).

Indicators

As with the previous key message, the same five countries propose a number of indicators also in this area.

Key message 4: valuing learning

Proposals for actions at national level

Numerous projects are under way in Slovakia. Otherwise, the reports show that consideration of this issue is still at an early stage. While there are no concrete proposals, there are some principles and general orientations for future work at national level. The most frequently mentioned relate to:

- close links between the launch of modular training approaches and the development of innovative practices to value non-formal and informal learning (Bulgaria);
- the importance of building mutual trust through the involvement of all key participants in recognising learning outcomes (Estonia, Slovakia);
- links between the introduction of dynamic innovative styles of teaching and learning and changes in approaches to assessment (Malta);
- the need to boost know-how concerning the development of new ways to allow for the accreditation of prior and experiential learning (Latvia).

Proposals for action at European level

Several countries would welcome European initiatives to:

- facilitate the exchange and sharing of experiences in this area;
- disseminate research in the evaluation of instruments for assessment and recognition;
- develop a framework of good practice for assessing skills and knowledge acquired through non-formal and informal learning.

Indicators

Only one country (Cyprus) proposes indicators in this field.

Key message 5: rethinking guidance and counselling

Proposals for action at national level

Significantly, the countries agree on several key action points to be pursued at national level. These concern:

- the development of on-line career guidance services for all, supported by appropriate databases on learning and employment opportunities which also include information sources from other European countries;
- the co-ordination of career selection and career orientation activities taking place at schools and on the labour market;
- the networking of national and local counselling centres;
- the incorporation of the “career guidance and counselling” subject in the curricula at all levels of education;
- the working out of quality standards for guidance and counselling;
- the improvement of counsellors’ qualifications and skills by reinforcing their initial and in-service training on issues such as: management and analysis of information; foreign languages; information and communication technology; interpersonal skills; ability to influence growth of positive attitudes on the labour market.

Proposals for action at European level

- setting up a European database on employment and learning opportunities (Estonia, Latvia);
- setting guidelines and rules for developing related databases at national level-type, scope of information, collection methods (Poland).
- setting up a European Education Portal equipped with thematically classified information on educational materials, including up-to-date information on media education programmes and other current high quality media products. To complement this, there should be an open network of specialists and support for setting up national education portals (Slovakia).

Indicators

A single proposal from Cyprus.

Key message 6: bringing learning closer to home

Proposals for action at national level

The reports show the countries mostly agree on the priorities for action and measures at national level:

- mobilising all available educational and cultural resources (training institutions, libraries, museums, cultural centres, youth organisations, etc.) at local levels for the purposes of lifelong learning;
- developing an integrated way of using these resources (through suitable electronic connections, networking and co-ordination arrangements) to optimise their learning services;
- developing information and communication technology-based learning tools and materials to reinforce and expand the function of these resources as learning centres. At the same time, the centres must support more flexible (individual and self-directed) learning processes;
- providing adequate staff development actions in the institutions and agencies to enable staff to fulfil their new more explicit learning-oriented tasks;
- developing (or making better use of existing) co-operation platforms to unite all those involved at local level with the aim to enhance communication between the education and work environments.

Proposals for action at European level

This key message does not make any explicit proposals for action addressed to the European level.

Indicators

One country (Cyprus) produced one proposal.

Annex 1 - Countries

Bulgaria

1. The consultation process

The Ministry of Education and Science in Bulgaria was the main body responsible for the consultation process in Bulgaria. This meant setting up a Lifelong Learning Task Force, two round-table discussions, and written consultation among all members of the task force. The Lifelong Learning Task Force included representatives at national level from ministries, social partners, non-governmental organisations, professional institutions, education and training research establishments and governmental professional organisations. The process did not have a grant from the Commission. The text, which includes comments from task force members, focuses too much on higher education. This is because Bulgaria traditionally puts great stress on higher education. Other sectors (e.g. labour market training) attract scant attention.

The consultation process in Bulgaria only started in June 2001, with a summary report delivered to the European Commission on 15 July 2001. Given the short time, the consultation process was inevitably superficial. The information is general, with rough proposals for future implementation. Examples of good practice are isolated initiatives with no allowance made for sustainability and systemic impact.

2. Lifelong learning strategy framework

In Bulgaria, despite some awareness of the importance of lifelong learning, little consideration has been devoted to the aim of extending lifelong learning to cover the whole education and training system.

There is still no legislation or strategy for lifelong learning in Bulgaria, but different lifelong learning principles are present in various acts. The right to education and training is included in the Constitution of the Republic of Bulgaria (1991), the Law on National Education (1991), the Law on Vocational Education and Training (1999), and the Law on Unemployment Protection and Employment Promotion (1997) to support training for the unemployed and the continuing training of adults.

However, investment in human resources is part of Bulgaria's social policy, and is included in the National Economic Development Plan (2000-2006) and the National Employment Action Plan (2001). The six key messages of the Memorandum on Lifelong Learning correspond to the priorities outlined in these documents.

In addition, the Lifelong Learning Task Force moots a continuing debate through specific committees, national and regional programmes, conferences and seminars. This will be complemented by training for teachers and trainers, partnership-building measures at national, regional and local levels and regular labour market analysis.

This is a possible basis for developing lifelong learning in tandem with the creation of strong links between different initiatives and key stakeholders. Given Bulgaria's limited resources, it might be difficult to implement the proposed measures.

3. Challenges and obstacles in translating lifelong learning into reality

The Bulgarian Lifelong Learning Task Force sees co-operation and co-ordination between institutions as major challenges for lifelong learning. In this context, the report refers to organisations that resist change, rigid education and training systems, learners that lack motivation and lack of financial resources. All these factors might well jeopardise the realisation of lifelong learning.

Furthermore, there are several obstacles mainly related towards higher education. These include lack of well-qualified teachers, insufficient technical equipment in education and training institutions, and the teaching of skills now irrelevant to the labour market. At times, economic and financial difficulties prevent employers from investing in human resources development.

Bulgaria has no comprehensive analysis of all the challenges and obstacles let alone ways of overcoming them. These difficulties include out-dated teacher training system, lack of validation of non-formal learning, involvement of regional authorities and overestimation of higher education.

4. Concrete proposals for action

There are many proposals in the report, but they are vague and need further discussion. Proposals under key messages 5 and 6 are more concrete.

4.1 National level

🔑 Key message 1: new basic skills for all

Bulgaria proposes to extend learning of foreign languages to all pupils and students. Also information and communication technology skills should be provided for all, together with equipment. Teachers and trainers should be equipped with new skills.

🔑 Key message 2: more investment in human resources

There should be tax incentives for companies that include lifelong learning in their strategies. Furthermore, there should be a larger budget for human resources in the state budget, municipalities, and companies.

🔑 Key message 3: innovation in teaching and learning

Bulgaria proposes to establish branch training centres to provide tailor made skills. Furthermore, there should be modern, flexible and innovative methods for training adults. A modular training system that gives employees mobility for a lifetime should also be developed.

● **Key message 4: valuing learning**

Bulgaria proposes to develop assessment criteria for knowledge and skills in a lifelong learning context, and to integrate formal, informal and non-formal learning.

● **Key message 5: rethinking guidance and counselling**

Bulgaria proposes to open 28 information and career guidance centres as service institutions of the Ministry of Education and Science; likewise, guidance and information services in libraries.

● **Key message 6: bringing learning closer to home**

Bulgaria proposes to provide personal computer equipment for 440 computer laboratories for school in 2001 and to have 35 000 personal computers in the school network by 2005. Regional distance learning centres should be further developed and new ones established.

4.2 *European level*

Bulgaria proposes to establish a European Committee on Lifelong Learning; to promote bilateral and multinational projects for co-operation in the field of lifelong learning; and to connect existing national networks, this includes the development of a digital thematic bulletin and a web site on the problems of lifelong learning.

5. *Examples of good practice*

There are several projects mentioned, but they are mainly small isolated initiatives often funded through European Union programmes. Sustainability is ignored. The examples under key-message 1 and 5 might be considered systemic.

● **Key message 1: new basic skills for all**

There is a national programme for social and economic integration of the Roma population that includes training on new basic skills. There is also a programme to reintegrate socially disadvantaged young people within the education system.

● **Key message 2: more investment in human resources**

There are pilot employment programmes for young people to develop self-employment skills in sports, culture and tourism management.

● **Key message 3: innovation in teaching and learning**

There are three centres for vocational training financed by a German donor and applying new teaching methodology. There is a regional network (Albania, former Yugoslav Republic of Macedonia, Romania, and Bulgaria) for education in economy applying new teaching methodologies.

🔑 **Key message 4: valuing learning**

Bulgaria has introduced the European Credit Transfer System in several higher education studies, on a pilot basis. An Agency for Accreditation and Evaluation of higher education has been established.

🔑 **Key message 5: rethinking guidance and counselling**

In Bulgaria, there are 49 guidance and information centres affiliated to the labour offices. The centres provide services to students, unemployed, parents and other target groups.

🔑 **Key message 6: bringing learning closer to home**

In Bulgaria, there are four regional distance learning centres equipped with modern technology and providing training services in the region.

6. Lifelong learning indicators

The Bulgarian education system uses the following indicators:

- total number of persons involved in education and training;
- duration of education and training;
- types and forms of education and training;
- expenses;
- effect of education and training;
- equipment; and
- pedagogical personnel.

There are no indicators specific to lifelong learning.

Cyprus

1. The consultation process

The Ministry of Education and Culture created an inter-departmental committee. This consists of one expert from the Ministry for each of the six key messages and an executive director of the consultation process under the overall leadership of the Permanent Secretary of the Ministry. The task of the committee was to draft the report on the consultation process in Cyprus.

The Ministry invited a series of governmental organisations to submit written contributions on their current activities in lifelong learning. It also asked non-governmental organisations to do the same concerning future actions on lifelong learning. In addition to these contributions, three meetings were organised as part of the consultation process. The first discussed the approach to the consultation process. The second discussed what the different organisations have done about lifelong learning, their future plans and the relevance of running the consultation process along the lines of the six key messages. The third meeting was to finalise discussions on the Memorandum, and provide final input for the report.

There was also a drafting group of six staff from the Ministry.

Some 17 organisations were involved in the consultation process. The organisations were the Ministries of Education and Culture, Labour and Social Affairs, Agriculture and Natural Resources and Environment, Finance, and Health; the Planning Bureau; the University of Cyprus; the Human Resources Development Authority; Cyprus Academy of Public Administration; three teachers associations (primary, secondary and technical education teachers); some trade unions and employers organisations. The process was limited to meetings with representatives of the key institutions at national level. It did not involve training providers, teachers, students and employers; nor was it carried out at regional level.

2. Lifelong learning strategy framework

The report does not describe a comprehensive strategy for lifelong learning. Rather, it describes the existing education and training system and the important achievements made within its different sub-systems. Examples can be found in paragraph 5 “Examples of good practice”.

The report stresses the importance of the initial and continuing training of adults under the aegis of the Human Resources Development Authority. It also underlines the importance of adult education and the provision of a second chance for adults to obtain basic skills as well as the usefulness of a learner centred approach focused on the individual’s place and role in society. Increased flexibility of the system is also sought through Learning and distance learning. Nevertheless, the report has no real overall strategy for lifelong learning.

3. Challenges and obstacles in translating lifelong learning into reality

The report emphasises the importance of the basic skills of literacy and numeracy, and stresses that we should not overlook these in the quest for new basic skills. It asks how best we can prompt those with relatively low education continuously to upgrade their knowledge and skills. The report states that raising public awareness is crucial to raising the level of investment in training. Furthermore, the change from a teacher dominated approach to a learner centred one will require an overview of issues such as the aims, objectives, learning environment and assessment tools at schools. The report stresses lifelong learning demands a new look at the changing roles of teachers and trainers.

4. Concrete proposals for action

4.1 National level

🔑 Key message 1: new basic skills for all

- In addition to the five new basic skills in the Memorandum, new basic skills should also include: problem solving skills; self knowledge; ability to work in a team and within the community; creativity to express oneself; basic qualifications for active citizenship; and understanding and empathy for fellow human beings.
- A diversity of adult learning formats should be developed with a national programme. A national learning institution should be set up and the conditions should be elaborated with the involvement of the social partners, adult training non-governmental organisations, professional organisations, adult learners and the church.
- National standards should be established; core curriculum and national tests for basic skills should be developed while special new learning materials should be produced; special training in adult education, professional training and continuing training should be introduced for basic skills teachers; special professional assessment and evaluation arrangements, quality assurance and accreditation systems should be introduced for the entire basic skills education and training provision.

🔑 Key message 2: more investment in human resources

- Human accounts in education could be used to encourage people to contribute to the cost of their education by means of special savings and deposits supplemented by scholarships granted by public or private organisations. Another approach could consist of business systems that allow workers free time or provide finance to attend classes of their choice or related to their occupation.

🔑 Key message 3: innovation in teaching and learning

- Teaching and learning methods should adapt to a highly diverse range of interests, needs and demands of individuals and business. Existing practices should improve and new approaches be further developed to take make use of the scope offered by information and communication technology to enable individuals to become active learners.

🔑 **Key message 4: valuing learning**

- Recognition of the accreditation of learning is the focal point of evaluation. Acceptability within the country could be set up by developing an information system on all activities that involve lifelong learning. The relevant ministries should be responsible for their own sectors and a central State authority should be created to give recognition and validity.
- The assessment and recognition tools developed in the European Union (European Credit Transfer System, EUROPASS, European Voluntary Service, European Computer Driving Licence) should be extended by creating national examination centres. These, in turn, should be affiliated to the central scheme by creating modules to meet local needs.
- As well as state institutions, non-governmental organisations should be involved in valuing learning.

🔑 **Key message 5: rethinking guidance and counselling**

- There should be a freely accessible data bank based on the Internet. This would provide guidance on education, vocational and personal issues;
- in line with current European rules, official state services should monitor the quality of advisory services in the mixed public and private market.

🔑 **Key message 6: bringing learning closer to home**

- Local centres should provide citizens with easy access to information and communication technology and there should be introductory courses on new technology for everyone;
- municipal libraries should upgrade their technology to become centres of access to universities;
- eLearning should introduce learning and information infrastructure on regional and local levels together with analysis of local needs and research;
- there should be counselling services to promote the performance of tasks.

4.2 *European level*

🔑 **Key message 2: more investment in human resources**

- The European Union should undertake a common investigation initiative to measure investments and results. This would clarify the socio-economic benefit of investment in education throughout life;
- Structural Funds should be used to improve the existing education infrastructure and especially to provide sophisticated information and communication technology equipment.

🔑 **Key message 3: innovation in teaching and learning**

- A Pan-European system for disseminating school-based innovations to teachers in other countries;

🔑 **Key message 4: valuing learning**

- a comparative study between different countries should be carried out for mutual acceptance;
- the European Education Portfolio should be used as a model for creating a European Adult Portfolio;

- information and communication technology and European experience should be used to broadcast “successful case histories” as a basis for a commonly accepted approach in the future;

🔑 **Key message 5: rethinking guidance and counselling**

- National Internet based data banks should be linked at European level;
- exchange of experience for counsellors should be organised at European level through conferences and seminars as well as through staff exchange programmes.

5. Examples of good practice

🔑 **Key message 1: new basic skills for all**

- The Ministry has set up Adult Education Centres to promote the acquisition of basic skills by adults. They provide a second chance for early school leavers, older workers, people with low or no qualifications and the unemployed. Founded in 1960, the 250 centres attracted over 17,000 adults in 1999 and 2000.
- The national agency for human resources development, the Human Resources Development Authority, has engendered a flexible non-formal training system. To meet the needs of the economy, this comprises initial training programmes and continuing training programmes. Accelerated initial training programmes provide basic skills for new entrants into the labour market. They also equip the unemployed with skills to meet needs in occupations where there are skill/labour shortages.

🔑 **Key message 2: more investment in human resources**

The creation of the Human Resources Development Authority in 1979 revolutionised investment in human resources. Through a payroll levy, it funds three different schemes.

- The training support schemes provide technical and financial support to enterprises and training institutions for the design, organisation and implementation of initial and continuing lifelong learning initiatives. The former include in-company initial training programmes; accelerated training programmes; management and industrial training of tertiary education graduates; an apprenticeship scheme; a post-graduate programme and industrial training of students from the Higher Technological Institute, the Higher Hotel Institute and from hotel sections of secondary technical schools. The continuing training initiatives include in-company training programmes; multi-company training programmes; and training abroad.
- The Human Resources Management Consultancy Services scheme aims to improve productivity and increase the competitiveness of enterprises through the development and better use of human resources. In year 2000, the scheme encompassed the creation of a similar scheme for micro-enterprises.
- The training infrastructure support scheme provides financial assistance for upgrading the training infrastructure of enterprises, institutions, and organisations to meet training needs in priority areas.

Key message 3: innovation in teaching and learning

- Cyprus has started to introduce co-operative learning at primary level to enhance academic performance and personal development. A programme of self-awareness, self-control and self-development has also been introduced;
- particular stress emphasis has gone to the systematic training of school leaders in vision and strategic planning in view of their key role in ensuring quality of teaching and learning.

Key message 4: valuing learning

- The Cyprus Council for the Recognition of Higher Education Qualifications was established to decide on academic recognition of degrees, diplomas and other qualifications conferred by institutions of higher education.

Key message 6: bringing learning closer to home

- The Government decided in April 2001 to establish a Cyprus Open University based on the Open Universities in Greece and the United Kingdom. This decision should help to establish lifelong learning as a route to a knowledge-based economy and society.

6. Lifelong learning indicators

Key message 1: new basic skills for all

- Mean years of schooling, students by level of education;
- educational attainment for those of 20 years or more in census years;
- enrolment in full time education by level;
- percentage of educational establishments with access to the Internet;
- percentage of students with access to computer;
- number of students per computer in institutions by level;
- third level students per 10,000 habitants
- total years of schooling for over 40s;
- participation rates in elections (presidential, parliament, municipal);
- participation in social groups.

Key message 2: more investment in human resources

- Number of students per class;
- per capita expenditure on education by level.

Key message 3: innovation in teaching and learning

- Number of students per teacher;
- frequency of in-service seminars.

🔑 **Key message 4: valuing learning**

- Number of teachers per inspector;
- existence of accreditation-recognition systems.

🔑 **Key message 5: rethinking guidance and counselling**

- Number of students per guide.

Cyprus also proposes other indicators that relate to measuring lifelong learning:

Labour market related outcomes

- Percentage of graduates employed in a profession related to studies;
- participants in training systems.

Access

- Percentage of persons attending school by level (primary, secondary, higher);
- students in non-formal education by type of education.

Participation

- School leavers who proceed to the next stage of education by level;
- number of persons in “second chance schools” in secondary education.

Czech Republic

1. The consultation process

The consultation process was carried out under the main responsibility of the Ministry of Education, Youth and Sports in close co-operation with representatives of the Ministry of Labour and Social Affairs and the Ministry of Industry and Trade. The Ministry of Education Youth and Sport entrusted the National Observatory with the organisation and co-ordination of the process, which was supported by a grant from the European Commission. The National Training Fund hosted the process.

Before the consultation process, there was an information campaign on the aims and relevance of the exercise in the context of implementing Czech education policy and preparing access. Institutions, experts and social partners at all levels were asked to contribute to the forthcoming discussion.

The consultation process was comprehensive. It involved a variety of stakeholders at national and regional level. These included representatives of administrative bodies, social partners, education and training providers, higher education institutions, school associations, employment services, pedagogical centres, experts, research institutions, guidance and counselling centres. These contributed to the debate in a series of informal workshops and discussions around the six key messages of the Memorandum. In addition, the Ministry of Education Youth and Sport ran a national seminar on the preliminary outcomes of the consultation process and lifelong learning indicators for about 150 participants. Three regional seminars with about 100 participants each completed the cycle of targeted events.

The Memorandum was also discussed at a number of events on related subjects. These included the international conference "Telecommunications in Education", the seminar "New Counselling Concepts" organised by the National Resource Centre for Vocational Guidance, a regional seminar in Most, North Bohemia, dedicated to the Regional Human Resource Development Fund project under Phare 2000, and a meeting of the expert group on education of the parliamentary committee for education.

Further measures enabled more people to join in the consultation and express their views. The Memorandum was translated into Czech and put on the Internet. A web site for this purpose gave access to an interactive electronic discussion group and a printed version went to participants in the relevant events.

Media coverage of the Memorandum and the consultation process included articles in the press and programmes on television.

2. Lifelong learning strategy framework

The consultation on the Memorandum took place at a nodal point in education reform and this might well lend momentum to the process. A number of policy documents drawn up in previous years already reflect the lifelong learning concept (e.g. the Green Paper "Czech Education and Europe", and the concept paper "Education and Development of the Education System of the Czech Republic"). The "National Programme for the Development of Education in the Czech Republic" (White Paper), approved by the Government this year, adopts lifelong learning as a key principle.

Other documents, such as National Development Plan and its implementation tool, the Sector Operational Programme of Human Resources Development, and the National Employment Plan, National Employment Action Plan, Strategy for the Development of Human Resources in the Czech Republic, Outline of State Information Policy in Education (all drawn up under the main responsibility of the Ministry of Education Youth and Sport and the Ministry of Labour and Social Affairs) include lifelong learning elements.

The report indicates a comprehensive understanding of the lifelong learning issues including the “lifelong” aspects, access for all, and division of responsibilities among state, social partners, enterprises and individuals. At the same time, the traditional sector-dominated approach prevails. In order to translate the lifelong learning concept into practice, co-operation among the different stakeholders must be reinforced.

3. Challenges and obstacles in translating lifelong learning into reality

According to the report, there is still a need to increase awareness on the important role of human resources development among policy makers and key participants in economy. Current obstacles to lifelong learning development are the existing structure of the education system (rather rigid, selective, not adapted to individual needs), lack of systematic social partner involvement, budget constraints, and low level of public support to schools and teachers. The development of continuing education and training is hampered by the lack of legislation to define responsibilities of main stakeholders, create links with initial education and training; ease transferability between the two areas, and ensure a coherent approach towards education, employment and social policies.

Although these factors are relevant, they indicate a central perspective and a tendency to neglect the regional and local dimensions. This is linked to the fact that public administration reform and devolution of power to the regions are still incomplete. Without adequate co-operation, involvement of participants at regional and local level remains limited and sustainable partnerships have yet to be set up.

Moreover, the absence of clear targets and action plans at national, regional and local level impedes the realisation of lifelong learning.

4. Concrete proposals for action

The Czech report does not follow the predefined structure of the six key messages of the Memorandum. Instead, it integrates proposals resulting from the consultation under four headings referring to (i) qualifications, key competencies, modularisation, (ii) financing and investments, (iii) guidance and counselling, and (iv) distance programmes and eLearning. The rationale for this approach is the interrelation of the issues outlined in the Memorandum.

The proposals are often vague and general, and more concrete suggestions tend to be obvious. Sometimes it is not clear to whom specific proposals are addressed (individuals, enterprises, government), but many of the issues raised are within the state domain.

Nevertheless, this subchapter tries to extract the most relevant proposals and relate them to the different key messages.

4.1 *National level*

🔑 **Key message 1: new basic skills for all**

- It is recommended to introduce 'key competencies' into all curricula;
- to avoid a "digital divide" of society, access to computers and the Internet needs to be expanded, e.g. by opening information and communication technology facilities at schools and libraries to a wider public;
- there is a need for more flexible and transparent curricula to ease the transfer of skills and competencies across various educational programmes.

🔑 **Key message 2: more investment in human resources**

- As budgetary constraints are unlikely to be resolved soon, the report recommends developing multi-source funding mechanisms, combining state funds with contributions from companies, social partner organisations and individuals;
- to stimulate investment from employers and employees, financial incentives (e.g. tax reductions) might be considered. Another possibility would be the creation of levy funds. Moreover, possible support to companies through (future) European Union funds could be explored;
- in addition, emphasis should be put on better management and more efficient use of resources.

🔑 **Key message 3: innovation in teaching and learning**

- Emphasis must go to developing new teaching methodologies, in particular in initial education and training, to create a basis for independent lifelong learning. This means reconsidering the traditional school-based education system;
- adaptable user-oriented learning systems catering for different target groups, e.g. modularised courses need to be developed and implemented;
- there is a need to use up-to-date educational technologies, develop appropriate teaching materials, and introduce effective quality assurance mechanisms;
- the professional competence of teachers is vital to success. New ways in teacher training, in particular also for adult education, must be developed.

🔑 **Key message 4: valuing learning**

- There is a need to develop adequate legal provisions for accreditation and certification of skills and competencies acquired outside the formal education system, in particular through work experience;
- social partner involvement must be strengthened, in particular as regards development of a comprehensive qualification system, and accreditation and output evaluation with a view to ensuring relevance of educational outputs for the labour market.

🔑 **Key message 5: rethinking guidance and counselling**

- To streamline guidance and counselling provision and create an integrated approach, co-operation of the relevant ministries in charge must be strengthened;
- emphasis must go to professional development of staff, improvement of information systems and strengthening of the network of guidance and counselling providers.

🔑 Key message 6: bringing learning closer to home

- Distance education and eLearning possibilities must be further developed to support individualised and self-steered learning processes, in particular for those who want to combine employment with further personal development;
- a number of support measures are necessary to achieve this aim. These include development of adequate learning tools, transformation of public locations into learning centres for all, creation of a financial support framework, and affordable Internet costs.

Proposals related to funding, and access to and use of information and communication technology facilities are comparatively concrete, whereas others are general rather than action-oriented.

In principle, all components mentioned in the Memorandum are covered, but some imbalances occur. As for elements considered vital to a coherent and comprehensive lifelong learning strategy, the proposals aim mainly at improving the current education system (e.g. through curriculum development, modularisation) rather than at more radical changes to broaden access, meet new learners' needs, increase flexibility in time and space. There is less stress on measures to create an environment to stimulate learning and motivate individuals.

4.2 *European level*

The report contains a number of ideas and suggestions for concrete action at European level. The priorities are systematic involvement of the candidate countries in all European Union activities promoting lifelong learning and measures to facilitate candidate countries' participation in the EUROPASS system. Moreover, it is proposed to foster exchange of experience among stakeholders, dissemination of examples of good practice, comparative analyses on specific topics with the support of the European Centre for the Development of Vocational Training, European Training Foundation and National Observatories, the use of European programmes and initiatives (e.g. Leonardo, Socrates, Euroguidance network) to promote lifelong learning and staff development in adult education, guidance and counselling. Another proposal is to draw up a "Joint Assessment Paper on Lifelong Learning", identifying priorities for action and concrete implementation subject to regular monitoring. This might serve as a spur to progress in this field.

5. *Examples of good practice*

The report describes examples that include elements of lifelong learning development, in which key policy-makers are involved (e.g. increased co-operation among relevant ministries, development programmes for teaching staff, councils on adult education, new counselling initiatives, social partner involvement in projects related to definition of qualification requirements for specific occupations, Leonardo project outputs, etc.).

On the one hand, the list reflects the wide scope of lifelong learning-related actions already implemented in the Czech Republic. It also gives some promising examples that could be built upon. On the other hand, it betrays the lack of an integrated vision and of co-ordination and co-operation between the main participants.

6. Lifelong learning indicators

Insufficient information on continuing training and the absence of indicators to capture trends and progress in lifelong learning are clearly major shortcomings. As regards lifelong learning, the report refers to the drawing up of a set of internationally valid indicators. These should be available in 2002 and they ought to lead to the development of monitoring systems at national and European level.

Concerning continuing education and training, a number of qualitative and quantitative indicators are proposed to create a basis for further development in this area with a more strategic perspective.

The adaptation of indicators used in the context of Phare programmes and policies for lifelong learning purposes is under discussion.

7. Aspects not covered by the Memorandum

The Czech report identifies two aspects that deserve attention:

- the issue of effectiveness and efficiency of education and training (input provided versus outputs achieved, e.g. related to labour market needs);
- an analysis of the essential parameters to make the lifelong learning concept work. This might be particularly useful for countries that need to address basic systemic shortcomings before they embark on more innovative practices.

Estonia

1. The consultation process

The Estonian Ministry of Education appointed the Association of Estonian Adult Educators to design and carry out the consultation process. The consultation process in Estonia was comprehensive involving the main key stakeholders in education both at national and regional level, as well as social partners and individuals. Estonia took a positive approach. It translated the Memorandum into national language and put it on the web site by December 2000. It organised events to spread information in January and February 2001. In addition, Estonia used European Commission grant and in June 2001 conducted 15 seminars with 400 participants as well as electronic discussion groups to reach individual citizens.

A steering group of people from all 15 counties was set up. The role of other ministries was indirect via a working group of the National Council for Adult Education.

The Association of Estonian Educators made extensive use of the Internet including the publication of the Estonian version of the Memorandum and the creation of a virtual forum for the general public. The Parliamentary Commission on Culture discussed the Memorandum, and preparatory seminars on the Memorandum's six messages were held for experts who subsequently held seminars in the 15 counties of Estonia. These events aimed to collect opinions, ideas and inputs from local authorities and key people representing local government authorities from the 15 counties, from departments in the counties responsible for education, public and private education. Views also came from training providers at different levels, from social partners, non-governmental organisations, and teachers and students as well as individual citizens.

Before the consultation process, the National Council of Adult Education established a working group to prepare a draft proposal for a white paper on lifelong learning in Estonia. This group worked closely with the Association of Estonian Adult Educators, and drawn much valuable information from the consultation process. As a result, several amendments to existing acts and regulations (e.g. Adult Education Act) are envisaged in the forthcoming years.

2. Lifelong learning strategy framework

The vision of lifelong learning in the report is both coherent and comprehensive: it covers both initial and continuing, formal, non-formal and informal learning; it also addresses all six key messages by clearly identifying the major problems in the country followed by useful and practical suggestions.

3. Challenges and obstacles in translating lifelong learning into reality

The national report identifies many different challenges and obstacles under the six key messages of the Memorandum. The most crucial are linked to motivation and financial resources for lifelong learning, infrastructural needs and co-ordination problems. The annual Vocational Education and Training Review of Progress Report 2001 confirms the need for expansion of the continuing training system and financial incentives, as well as the promotion of active labour market measures. There is also a need to clearly identify the strategic balance between provision of different schooling levels (general secondary, vocational education and training, higher education) and its implementation.

🔑 Key message 1: new basic skills for all

- Curricula are not learner-oriented but subject oriented;
- there is a general lack of motivation to learn, and education is thought to be just for children and young people. Institutions providing adult training are often expensive. It is necessary to confidence in the potential learner towards the education and learning environment;
- lack of qualified information and communication technology teachers and relevant training material in Estonian language;
- the concept of basic skills is not standard; cultural and national identities may differ a lot.

🔑 Key message 2: more investment in human resources

- Both local authorities and companies do not value lifelong learning;
- there is a lack of information and communication technology infrastructure in local adult learning centres;
- there is a lack of data on adult education and lifelong learning.

🔑 Key message 3: innovation in teaching and learning

- At the same time as there is a lack of information and communication technology infrastructure, its role in lifelong learning is over-emphasised at the expense of face-to-face teaching-learning environments;
- adult educators and trainers are not recognised professions. This means they are less trained in the use of new methodologies, including the use of information and communication technology;
- lack of financial resources for educational research as well as for dissemination.

🔑 Key message 4: valuing learning

- Although education has been declared as the main priority when Estonia became independent in 1991, it appears that this is limited to formal education. Lifelong learning is not given sufficient importance and informal learning is not recognised;
- it is not clear which institutions have the right to issue licences;
- there are no formal links between adult education, lifelong learning providers, professional associations, enterprises and social partners;
- mutual recognition is missing.

🔑 **Key message 5: rethinking guidance and counselling**

- There is no coherent counselling system in Estonia at the moment;
- there is a lack of overview of the situation in all European Union member States and in candidate countries. This lack of information makes it hard to give advice;
- competence fields for counsellors are not specified;
- the need for counselling and guidance should be made clearer to potential beneficiaries.

🔑 **Key message 6: bringing learning closer to home**

- Small schools are closed down because of the diminishing number of children rather than changed into multifunctional education, sport and culture centres. There is too much focus on the Internet as a replacement for face-to-face learning;
- the needs for lifelong learning of the learner and of the companies have not been analysed and clarified;
- there is a no consistent approach to lifelong learning. This makes it difficult to draw up a single strategy for both European Union member states and candidate countries;
- there are few links with European Institutions involved in lifelong learning.

4. Concrete proposals for action

4.1 National level

The report provided numerous concrete proposals and ideas for national action related to all six key messages. Some proposals overlap and are partly repeated within other key messages, but the following priorities emerge clearly:

- more investment in lifelong learning (shift in budget priorities, establishment of a National Lifelong Learning Fund, eLearning fund, use of Structural Funds, loans, tax-free investments, support to lower income class); this proposal might build on the Development Plan for the Estonian Economy 1998-2002 which has foreseen a National Training Fund for Continuous Vocational Treatment, however, so far there have been no indications for realisation;
- strengthening the research base (needs for lifelong learning, local opportunities and lifelong learning plans, teaching and learning opportunities, drop-outs);
- creating a lifelong learning mentality and support structure (use of schools for lifelong learning, promotion campaign, flexible curricula, networks of key participants, association of lifelong learning institutions, lifelong learning department in the Ministry, amendment of laws);
- valuing all forms of learning (learning accounts, recognition of informal, non-formal learning, accreditation of prior and experiential learning).

🔑 **Key message 1: new basic skills for all**

- Curricula should be more flexible and oriented towards the future, employers and learners should help to draft new curricula;

- schools should open as learning centres for adults; residential schools should be open to children from socially disadvantaged families;
- a special fund for the development of eLearning to counter the widening digital divide should be created, public access to the Internet should be guaranteed in rural areas;
- lifelong learning – its needs, its situation - in the different regions should be carried out; the law must define the role of local authorities in lifelong learning.

🔑 **Key message 2: more investment in human resources**

- Priorities of state and local budgets must adapt to the needs of lifelong learning, investments in human resources development must be made public; loans and learning accounts should be provided for the individual;
- promotion campaign for lifelong learning (TV programmes etc.);
- establishment of a network of local employers, adult educators and representatives of local authorities so as to make investment in learning more efficient and useful.

🔑 **Key message 3: innovation in teaching and learning**

- Special training courses should be run for information and communication technology specialists and adult teachers, respectively. The former should be trained in human-based technologies and andragogical methodologies, the latter should be trained in information and communication technology;
- a license system should be developed for curricula, study programmes and study material;
- training of adult trainers financed from Structural Funds;
- priority research on teaching and learning methodologies, adult learners, drop-outs;
- dissemination of good practice should be increased.

🔑 **Key message 4: valuing learning**

- Establish a lifelong learning department within the Ministry of Education with at least five staff;
- amendment of the Adult Education Act to set informal, non-formal and formal education at the same level;
- creation of a system for accreditation of prior and experiential learning;
- establishment of criteria for mutual recognition of diplomas and certificates, as well as non-formal and informal education.
- establishment of an educational aid fund for those who are not able to pay for lifelong learning;
- improvement of the co-operation between lifelong learning providers, enterprises and social partners by common projects, like development of standards and qualification demands.

🔑 **Key message 5: rethinking guidance and counselling**

- Creation of an adult education Internet portal available to counselling services;
- creation of a database to be used both nationally and internationally with access to information from labour market, counselling institutions in other European countries;
- clarification of the role of counsellors and organisation of their training;

- promotion of e-counselling by employers;
- establishment of national and local counselling centres. Priority should go to the national level over the international co-operation.

🔑 **Key message 6: bringing learning closer to home**

- Re-opening of empty schools and conversion into local learning centres, equipped with information and communication technology infrastructure, Internet connections, etc.;
- creation of an association of lifelong learning institutions in order to ease planning, financing and monitoring activities;
- realisation of a research funded by Estonia and European Union on educational needs, lifelong learning opportunities in order to design local lifelong learning plans;
- establishment of a National Lifelong Learning Fund containing tax-free investments from public and private sector.

4.2 *European level*

Several proposals for actions at the European level were presented, some of them concrete and mainly referring to key messages 2 and 5. They focus on:

- a) research and assessment issues (social-economic benefits, lifelong learning strategies, teaching and learning methodologies, quality of training, existing practices in Europe) and;
- b) common European standards (indicators on investment, common qualification criteria, common eLearning methodologies, qualification system, European Curriculum Vitae).

🔑 **Key message 2: more investment in human resources**

- A cross country assessment of the quality of training should be carried out in the European Union and the candidate countries;
- Europe-wide indicators on investment in lifelong learning should be introduced;
- Europe-wide research should be carried out to assess the social and economic benefits of investing in lifelong learning;
- the European Social Fund should be open to candidate countries to increase investment in lifelong learning.

🔑 **Key message 3: innovation in teaching and learning**

- Common eLearning methodologies should be drawn up at European level;
- common qualification criteria for adult educators should be developed at European level as well as specific criteria for people teaching special target groups such as the disabled and prisoners; training adult trainers should be a joint European priority and funded from the European Social Fund;
- co-operation between European countries should be further strengthened;
- there should be a cross-country analysis of the most popular teaching-learning methodologies and technologies and of different approaches to lifelong learning strategies.

🔑 **Key message 4: valuing learning**

- Establishment of a universal qualification system in Europe;
- establishment of a European working group to develop a common European Curriculum Vitae;
- carrying out of cross-country analysis of existing practices in Europe.

🔑 **Key message 5: rethinking guidance and counselling**

- Establishment of a European Database Centre with links to counselling institutions around Europe;
- establishment of a European network of national and local counselling centres to exchange information between practitioners.

5. Examples of good practice

Out of the several good practice examples presented, both at national and local level, the activities linked to the countrywide computerisation policy appear very ambitious and impressive. Concerning financial incentives however, the taxation law which provides income tax deduction from educational expenses (private schools, adult education) has yet to reach breakthrough point as, in practice, it is limited to those with higher incomes. The Joint Assessment Paper concluded between the European Community and Estonia in March 2001 clearly stated the need to widen access to continuing education and training, including vocational education and training related to the information society.

🔑 **Key message 1: new basic skills for all**

- In a small island community, Hiiumaa Island, a centre for adult learners has focused on the personal development of the learners through strengthening their communication and co-operative skills and self-esteem. The main target group is unemployed;
- from 1997, project "Tiger Leap" has been in action. This aims to equip all 688 schools with a new information and communication technology infrastructure. In 2001, the project also included teacher training in computer skills;
- top private companies in Estonia decided to keep 10% of the first year employees' salaries to finance training courses for staff;
- the Government subsidised 20,000 computers for rural areas to farmers.

🔑 **Key message 2: more investment in human resources**

- The taxation law has been amended so that every learner in Estonia who finances his or her learning (or their children's) can claim reimbursement from the state of an amount equal to 26% of the expenses;
- the Social Security Law ensures re-training for unemployed people. It is financed by the State Budget;
- the Adult Education Act states that each adult person has the right to take 14 days a year of paid leave for training purposes.

🔑 Key message 6: bringing learning closer to home

- A large-scale co-operative project (16 Million) between private, public and third sector aims to establish countrywide Internet points, to provide Internet access and teaching for all people, in particular for socially excluded and older people.
- A trans-national project has been initiated between Finland and Estonia in the region of Ida-Virumaa to study locally determined needs of the learners and to start designing an adult education system in the region.

6. Lifelong learning indicators

The report does not contain proposals for indicators of lifelong learning.

Hungary

1. The consultation process

The Ministry of Education in Hungary was the main body responsible for the consultation process in Hungary. The process involved round-table discussions, seminars, an Internet forum, a professional forum and a national conference on lifelong learning organised by the Hungarian People's High School Society. The process was supported by a grant from the Commission. A wide range of key stakeholders has been consulted in the process. These include representatives from the ministries, the social partners, non-governmental organisations, professional institutions and education and training research establishments, governmental professional organisations, formal and non-formal educational establishments at all levels including the regional training centres, universities, vocational training schools and special vocational schools. Wide ministerial consultation was possible through the channel of the working group preparing the education and training chapter of the National Development Plan. Comments from the different actors have been integrated into a text that incorporates responses from the formal education sectors and from non-governmental organisations working with disadvantaged individuals. There is a strong focus on the social dimension of lifelong learning. Examples of good practice come from different education sectors (higher education and vocational education and training) and from the People's High School Society.

To achieve the widest public in the short time available, the Ministry of Education established a website that linked into the websites of other national lifelong learning co-ordinators. The Memorandum and the lifelong learning questionnaire were translated into Hungarian and made available on the website. An Internet discussion forum was also created on the web pages of the National Public Education Institute. This enabled a broader public to access the Memorandum and to voice its opinions.

Because of the short time available, the consultation process, although wide, has not necessarily been in great depth. Bilateral discussions between the government and some organisations have taken place, but it has been impossible to involve all the interested parties. Some organisations (for example the economic chambers) do not appear on the list of organisations consulted and no regional dimension is given. Whilst use of the Internet has undoubtedly widened the scope of consultation, a more dynamic rolling programme of conferences - bringing together groups with similar interest (such as employers and employer organisations) and involving the regions - might have provided a platform for more in-depth debate on the key issues.

2. Lifelong learning strategy framework

There is widespread awareness of the importance of lifelong learning in Hungary. The principle is being incorporated systematically into government policy and is reflected in new legislation and strategic documents. It is given high priority in the White Book of Education (about to be published) which provides a medium-term strategy for education and training. It is also one of the priorities of the education and training component in the Hungarian National Development Plan and a central theme of the new Adult Education Act which is expected to be passed in the autumn. This will set the legal context for adult education and, if passed, normative state finance will be given to all adults without qualifications. Existing legislation already supports training for the unemployed and training for adults who wish to complete their elementary and secondary education.

The 1997 CXL Act, which protects cultural values, museums, public libraries and promotes general learning, is an important act in the context of lifelong learning in Hungary since it “provides both moral and financial backing to non-formal adult learning”.

2.1 *What is meant by lifelong learning in Hungary*

The Public Education Act in Hungary defines adult education as “school education and tutoring of students which is adjusted to the student’s occupation”. Participants may be those who are no longer “schoolable”, cannot or do not wish to participate in regular school education. It may also be those whose work or family or school experiences (possibly failures) prevent them from completing their studies in the traditional manner. This definition already widens the categories of learners. In addition, this Act allows flexibility to organise learning to meet the needs and goals of different learners. However, the focus here is on “completing their studies”. The Adult Education Act will broaden this definition. The Act will enshrine in law the right of all citizens to learn throughout their entire life “to enable them to meet the challenges presented by economic, cultural and technological development”. Alongside employment-related objectives, such as the “successful integration into the world of employment” and “success in their active lifetime”, there is a focus on increasing “opportunities for access to education and training, and therefore, to lifelong learning, for all members of society in order to improve the quality of life”. The Act clearly establishes the principle of equity and the importance of widening access to learning for all citizens. In the “Human Resources Development” chapter of the National Development Plan, the emphasis is on the importance of continuing training and the education of adults as a response to rapid labour market and technology change, to ensure the adaptability of the workforce and to fight unemployment. The report stresses the links between education and social policy in the field of lifelong learning. The importance of addressing the learning needs of “people who cannot find their place in the division of labour in society ... who can easily find themselves on the margins of society” so that they too can find employment is highlighted. Lifelong learning as a concept also relates to environmental issues and consumer protection as well as social policy.

The text of the Adult Education Act identifies the importance of a cultural dimension and the pursuit of quality of life, thereby echoing the 1997 CXL Act which supports the “preservation ... of national and ethnical cultural traditions”, learning for personal fulfilment” and for “improving citizens’ quality of life”. Comments in the report reinforce these concepts and highlight the importance of learning for active citizenship and for using free time usefully as well as for economic and employment reasons. The report also points to the potential danger of increasing cultural inequalities and the risk of sidelining the humanities with too strong a bias in favour of the pursuit of technical, economic and legal studies.

There is a good degree of consistency between the legislation and the strategic documents. In terms of comprehensiveness, there is certainly a gap in that no consideration has gone to the role of lifelong learning in contributing to regional economic and social regeneration. There could have been more focus in the report on the implementing mechanisms, for example the development of stakeholder partnerships and collective action at national, regional and local levels to achieve the objectives of the acts discussed above and to implement concrete action. The priority now is to translate these objectives into coherent actions on the field.

2.2 Developing coherent and comprehensive lifelong learning strategies

Hungarian legislation already articulates many of the principles, rights and structures on which lifelong learning is to be built – need for flexible provision adjusted to the needs of new “types of learners”, improved access to education and training for all. Modularisation of the vocational and education qualification system is also under way and career counselling and orientation are national priorities. There is also a strong focus on building a comprehensive national evaluation and assessment system.

Quality is highlighted as a key priority but it is not clear whether the quality systems being introduced include processes for the learning needs of disadvantaged people and the use of targets at local and regional level to monitor progress in meeting them.

The report also identifies a number of tasks vital to developing lifelong learning. These include the importance of building the organisation of lifelong learning from below and achieving high quality in organising education at all levels. The latter would involve developing the skills and competencies of teachers, trainers and instructors for new roles. The need to improve the dissemination of information on learning is highlighted. In addition, not only is there a need for finance (for example through tax incentives) but there is also a need for time to learn and the need for “a flexible system of labour-time management into which learning and training can be incorporated”. There must be a discussion between the different authorities responsible for formal, non-formal and informal learning.

Whilst this may not constitute a comprehensive lifelong learning strategy, many of the building blocks are beginning to be put in place, although the report provides no information on the share of resources allocated to the different components, either at national or at regional and local level. There is recognition too of the importance of stimulating the “demand” for learning through such initiatives such as “adult learners” week and using the potential of the media. Whilst the need to address the obstacles and needs of disadvantaged people is fully recognised, how you motivate people to learn, especially among non-traditional or so-called “non-learners” remains a key issue for further investigation.

3. Challenges and obstacles in translating lifelong learning into reality

The Hungarian report lists several obstacles including poor motivation of some people; unawareness of the importance of qualifications and retraining in order to remain employable in a constantly changing labour market; high drop-out rates from education among underprivileged groups; finance. Weaknesses exist in the system (e.g. no comprehensive counselling and guidance system; lack of a flexible learning environment; lack of information on relevant provision; inappropriate provision for disabled people and no provision for people living in small settlements). At times, employer attitudes are narrow and profit-oriented. Attention must go to the analysis of the numerous obstacles to implementing lifelong learning and to the identification of active measures to reduce them.

These challenges and obstacles testify the need for multiple responses which take account of individual needs and characteristics; changes to systems; changes in attitudes by individuals, employers, stakeholders; and the need for more research and exploration as to how to address the

range of issues relating to lifelong learning. Again, what is missing here is the challenge of developing effective partnerships and action plans, especially at regional and local level, to implement a comprehensive set of actions.

4. Concrete proposals for action

4.1 National level

● Key message 1: new basic skills for all

Hungary is to develop a national programme for the development of basic skills, building on the initiative of basic skills for the prison service. It has integrated digital culture into the curriculum with the aim that by 2006 all pupils leaving school will be digitally literate, although facilities are unevenly distributed among the different institutions. The need for foreign languages is also mentioned. However, Hungary emphasises the need to focus on traditional basic skills (reading, writing and arithmetic). This is consistent with the importance attached to the social dimension of lifelong learning and the need to bring marginalised people into the labour market. They are most likely to lack traditional basic skills, to have failed in the system and to be poorly motivated.

● Key message 2: more investment in human resources

In Hungary, employers already contribute 1.5% of their payroll costs to the Vocational Training Fund and can now retain 0.5% of their contribution for training their own employees. However, there are huge differences in the level of resources spent on training by companies, and very little support goes to employees in small firms. In addition, Hungary is shortly to introduce tax relief for training that leads to recognised qualifications. The employers' contribution to the Vocational Training Fund has been a very useful source of additional funding for developments in vocational education and training and to training in enterprises. However, more attention needs to be paid to identifying training needs, organising and funding human resources development for employees of small companies.

● Key message 3: innovation in teaching and learning

The Hungarian report identifies the important role of evening and distance learning in personal development. It also comments on the importance of information and communication technology-based learning tools, although these must be combined with other tools.

● Key message 4: valuing learning

The Hungarian report stresses the importance of ensuring the high quality of content, assessment systems and organisation of learning. To improve the quality of public education, Hungary will implement between 2002 and 2006 a comprehensive examination system for evaluation. A two-level matriculation system will be introduced in 2005 with the aim of increasing the rate of students taking matriculation to 80%. The school leaving age has risen to 18 for new entrants.

● Key message 5: rethinking guidance and counselling

Hungary identifies the need for a comprehensive counselling and guidance system from the start of school to retirement (from 6 to 62). They recommend that advice on career selection should be separate from that on career orientation – although there should be co-ordination between the two.

🔑 Key message 6: bringing learning closer to home

Hungary recognises the importance of stimulating “demand” for learning and suggests that the mass media is a useful vehicle for communicating information on lifelong learning programmes. The report recommends making use of initiatives such as Adult Learners’ Week.

4.2 *European level*

🔑 Key message 1: new basic skills for all

Hungary proposes that a working group be set up to define new basic skills to which its members would wish to contribute. However, the development of standards and measurement methods for new basic skills should be undertaken outside this working group.

🔑 Key message 3: innovation in teaching and learning

Hungary suggests establishing a European monitoring system for the collection, evaluation and dissemination of data on information and communication technology-based methodologies and materials. In respect of transnational projects, Hungary identifies the need to develop a system of assessment and suggests the establishment of a European Evaluation Centre. Hungary also proposes the establishment of a working group to address accreditation of prior and experiential learning issues.

5. *Examples of good practice*

🔑 Key message 1: new basic skills for all

Basic education programmes have been implemented in prisons in Hungary and in 2001 the government introduced a Year of Reading to promote reading.

🔑 Key message 2: more investment in human resources

In 2001, Hungary has also introduced a student credit scheme that allows participation in higher education irrespective of financial means.

🔑 Key message 3: innovation in teaching and learning

The Foundation for Open Vocational Training supports the development of distance learning services using information technology tools in a wide range of thematic fields of continuing training for adults. Groups targeted are employees with secondary and higher education qualifications in industry, agriculture and services and intellectuals. The Hungarian Academy of Sciences disseminates high-level knowledge of philosophy through the Internet Open University. This pilot initiative has the potential to adapt to other subject areas and other kinds of learners.

🔑 Key message 4: valuing learning

Modular curricula are being prepared as part of a rolling programme to modernise vocational training. Legislation in 2000 has created the basis for an institutional and national credit registration system that facilitates the alignment of academic programmes and freedom of movement for students. A two-year basic programme to train specialists in adult education, to be introduced in the autumn, aims to improve the quality of adult education.

🔑 Key message 5: rethinking guidance and counselling

Since 2000, employment centres have provided guidance and counselling services for the unemployed and employees. However, a comprehensive system needs to be developed exploiting information technology solutions and linking into services provided by educational institutions and other organisations.

6. *Lifelong learning indicators*

Hungary suggests that the scope of indicators needs widening to reflect both employment and active citizenship aims.

🔑 Key message 1: new basic skills for all

Hungary identifies the following areas as being extremely important for the development of indicators: traditional basic skills; foreign languages; information technology skills, familiarity with and participation in designing learning processes; social competence; student motivation; education of teachers, trainers and instructors. The following lifelong indicators are proposed:

- rate of participation at all levels of formal education;
- drop-out rate in formal non-formal learning;
- rate of successful completion in formal and non-formal learning;
- numbers making the transition from formal and non-formal learning to the labour market;
- education costs per student (including individual and public funding)/expenditure per student as a proportion of Gross Domestic Product per capita.

7. *Aspects not covered by the Memorandum*

The Hungarian report suggests that the Memorandum does not sufficiently define the direction of social discussion. It is biased in favour of employment issues. Lifelong learning is a much wider concept that also embraces environmental issues, social policy and consumer protection. Lifelong learning needs to address the social dimension, which is hardly considered in the Memorandum. As cultural inequalities grow, lifelong learning needs to focus on useful ways of spending free time.

The report highlights the need to give motivation much greater emphasis in the Memorandum. And there must be more investigation into ways of increasing people's motivation to learn. It also stresses the role schools can play in non-formal learning through work with different specialist networks (e.g. special services for parents with problems, drug and alcohol prevention).

While the Memorandum concentrates on new basic skills, there is little mention of the old basic skills that form the foundation for further and higher levels of knowledge.

It is important that adult education considers how parents' knowledge can be updated and developed while they look after their children in such a way that they can return to work in the future.

Latvia

1. The consultation process

The lifelong learning consultation in Latvia has been run by the Ministry of Education. A co-ordination committee has been set up to facilitate the process. It comprised three representatives: two from the Ministry of Education and one from the National Observatory. Its main tasks were to organise the consultation process and prepare the final report. One could have expected the presence of non-governmental organisations, social partners and other ministries in the co-ordination committee.

The national consultation process (April-June 01), supported by a grant from the Commission, comprised: an information seminar; dissemination of the Memorandum on lifelong learning in Latvian together with a questionnaire using several means (Ministry of Education Web site information in press, mailing); the set up of an Internet forum for discussion on the above Web site; meetings and discussions with other Ministries; six consultation workshops (one per key message); and a final conference chaired by the Minister of Education.

The involvement of participants in the discussions (representatives of ministries, social partners, non-governmental organisations, regional and local participants in education) was high. Nevertheless, while most of the proposals emerged from the workshops, Internet responses were very poor.

While very tight deadlines prevented an in-depth debate, the Ministry of Education has been very active in managing the consultation process. No specific indicators have been proposed. Although if the information in the different chapters of the report are cross-referenced, it can be said that the consultation process enriched the debate. Nevertheless the Latvian approach requires more discussion before an agreed and shared strategy can be reached and concrete actions can be developed.

2. Lifelong learning strategy framework

In Latvia, the concept of lifelong learning is at its initial stage of discussion. Lifelong learning does not feature in the 1998 Law on Education. Nevertheless, the most recent Vocational Education and Training Law (1999) already refers to lifelong learning by mentioning "that the main objective is to prepare specialists that meet the demands of the labour market and have obtained a positive background to continue lifelong professional development".

A law on adult education awaits finalisation. It should clarify the role of adult education within a coherent lifelong learning strategy at country level and define the responsibility of the various institutions involved in adult training at central and local level. It is important to recall that historically speaking in Latvia there was a division between compulsory education that prepared for a useful life, and adult education that was mainly understood to be any education voluntarily pursued by adults. It is important to indicate that many institutions (390), supported both at national and local level, are developing adult training in a complementary way (folk schools, Latvian Association of Adult education, regional adult education centres, etc.).

2.1 What is meant by lifelong learning in Latvia

The report defines lifelong learning as “a new stage of freedom to obtain education of any type and content at any time when there is a need or interest”.

In general terms, it considers lifelong learning to be the way to develop adult education and thereby ensure consistency with the initial and higher education systems for the benefit of individuals and society.

2.2 Developing coherent and comprehensive lifelong learning strategies

The report makes several recommendations with clear indications to various stakeholders like the state, non-governmental organisations, local and regional authorities and schools. It clearly identifies the need for development of a unified lifelong learning strategy for improvement of co-ordination between the ministries and other relevant participants. It also identifies the importance of ensuring coherence and synergy among the training delivery institutions, particularly at the local level. In addition, it points out the need to develop an effective system of guidance and counselling accessible by all training customers. This should include the most vulnerable target groups and the development of links between formal and informal education which will ensure a recognised system of evaluation of skills and competencies. The report also identifies as crucial the development of skills and competencies of teachers, and the creation of a new profession of guidance specialists.

3. Challenges and obstacles in translating lifelong learning into reality

The Latvian report points out several obstacles that limit the development of a Latvian lifelong learning strategy:

- there is no legislation to clarify the role of all stakeholders, the role of institutions that deliver guidance and counselling, and the involvement of social partners and enterprises;
- there is an information gap in the country as regards the new basic skills; nor is there much analysis of investment in human resources – it is either too fragmented or does not exist;
- links between the educational system and the working environment are too weak;
- teachers and school administrators lack basic skills;
- there is no recognised profession for guidance and counselling;
- there is a lack of communication and co-operation between the institutions, particularly at local level; as a consequence, the use of resources is ineffective and irrational;
- various social and financial factors affect adult participation in lifelong learning activities.

In addition, it is worth noting that the motivation of low-salaried teachers and trainees requires specific attention. The fragmentation of responsibility reduces co-ordination between the different stakeholders.

4. Concrete proposals for action

4.1 National level

General recommendations

The report emphasises the role that the state should play in developing a unified lifelong learning strategy. This strategy must ensure equal treatment for all citizens, co-ordinate the activities of different ministries and other stakeholders at national and local level using the already existing Tripartite Consulting Board. It must also establish a guidance and counselling system and develop training for trainers as regards new basic skills and active working methods.

In addition, it states the need to reinforce the information policy about educational opportunities, good practice and lifelong learning student successes, and develop existing databases.

It is also vital to promote the development of training and information about lifelong learning as regards leaders of non-governmental organisations, politicians, local administrators and principals of schools.

Specific recommendations by key messages

🔑 **Key message 1: new basic skills for all**

- The development of standards for new basic skills is urgent;
- information about new basic skills is to be reinforced at primary schools to prevent drop-outs;
- more training activities focused on new basic skills for target groups with social exclusion risks are to be carried out.

🔑 **Key message 2: investment in human resources**

- There is a need for more in depth analysis and researches on adult education development and capacities, human resources development at enterprise local and national levels, labour market developments and needs, regional evolution;
- regional social dialogue is to be reinforced;
- training of human resources managers is needed at businesses of all sizes;
- businesses should be prompted to appreciate the benefits of developing human resources;
- development of legislation is needed to encourage business to invest in human resources;
- recognition of qualifications is to be organised by the employers;
- the opportunity to use the European Social Fund after accession should be considered as a stimulus.

🔑 **Key message 3: innovation in teaching and learning**

- Development of university curricula for professional teachers working with adults;
- organisation of lifelong learning activities for teachers;
- development of schools educational and culture centres with flexible opening times with access to all categories of students (youngsters and adults);

- co-operation state and businesses between to encourage individuals to engage in continuing training;
- students should see their training as a shared responsibility;
- content of training activities should be in line with labour market needs;
- research into the impact of lifelong learning activities in other countries is needed.

🔑 **Key message 4: valuing learning**

- Links between formal and informal education must be strengthened;
- a system of evaluation and accreditation must be developed to include specific organisation and independent structures;
- parallel lifelong learning paths including modularisation of educational programmes to be developed; this must result in recognised qualifications for all students, including workers and lifelong learning students;
- a portfolio of standards must be developed to assess non-formal learning;
- an accredited prior and experiential learning system must be implemented.

🔑 **Key message 5: rethinking guidance and counselling**

- Guidance and counselling must be provided by qualified professionals. It is proposed to develop a university course for consultants in guidance and counselling, and then make this a pedagogical job title;
- co-ordination of the different existing systems of guidance and counselling, and introduction of all training activities into current local career guidance facilities;
- regular update of information on occupations;
- optimisation of resources such as databases.

🔑 **Key message 6: bringing learning closer to home**

- While the educational possibilities at the local level are well developed, there is a need to co-ordinate existing services and partnerships to ensure effective use of the current limited resources;
- educational boards must be set up at regional level, and co-operation between them must be ensured;
- schools, especially those in the country, must become multifunctional centres of education and culture;
- access to learning, whenever possible, must be free of charge;
- education providers should be able to deliver training in flexible ways particularly for adults;
- special programmes for adults must be developed.

4.2 *European level*

Latvia is already involved in several European Union educational programmes (Tempus, Grundvig, Minerva, Leonardo, ESTIA, etc.) and in international networks (ENIC-NARIC). That aside, the report identifies the need for the development of international discussions via videoconferences, the development of virtual classes and the access to databases and material resources.

5. *Examples of good practice*

🔑 **Key message 1: new basic skills for all**

A programme to develop information technology skills for all students at primary, upper and higher secondary schools is under development. The aim is to equip all schools with a high-speed Internet connection by 2004. At the same time, all schools should implement the e-management. In parallel, teaching materials are under development.

🔑 **Key message 3: innovation in teaching and learning**

Development of distance learning courses by the Riga Technical Distance Learning Study Centre (set up with Phare support) in co-operation with several clients (Chamber of Crafts, University of Environmental Management, etc.).

🔑 **Key message 6: bringing learning closer to home**

- Several adult education centres are becoming multifunctional by developing projects in co-operation with businesses and regional computer centres; joining forces with other training providers (i.e. in the same building); developing fine-tuned training activities for adults (i.e. summer camps);
- several local authorities are devoting a share of their budget (1-2%) for continuing training activities, using the capacity of the adult centres;
- practical solutions (i.e. using a bus service) are developed for people wishing to attend a particular course nearby;
- with the support of European Union programmes, distance learning programme projects have been developed.

6. *Lifelong learning indicators*

No proposals have been identified.

Lithuania

1. The consultation process

An extensive consultation process was carried out in Lithuania covering a broad spectrum of society involved in education and training. A steering committee under the chairmanship of the Minister of Education and Science was created with the participation of high level representatives of the Ministries of Social Security and Labour and Education and Science as well as from a chamber of commerce and a trade union. The steering committee delegated the implementation of the consultation process to a non-governmental organisation, the Lithuanian Association of Adult Education.

A total of 17 meetings with 1,000 participants took place in each of the ten regions in Lithuania. The final conference was organised via video-conferencing. Nationally, there were high-level meetings organised with the relevant Parliamentary committees and the tripartite councils on employment, vocational education and training and non-formal education, respectively. There were also national meetings for providers of non-formal adult education, for student organisations and associations of formal education institutions. The ten regional meetings involved the education and training community, social partners and non-governmental organisations.

The consultation process in Lithuania was very comprehensive and involved all the relevant partners (public authorities, social partners, non-governmental organisations and training providers) at both the national and regional level.

In general, the meetings discussed all six key messages of the Memorandum apart from a meeting organised for foreign language teachers. A training seminar was organised for a group of facilitators for the meetings. The Memorandum was translated into Lithuanian and widely distributed amongst participants at the meetings and members of the Lithuanian Association of Adult Education. It was also available via the Internet. Furthermore, focused questionnaires were sent to special groups to obtain concrete answers.

Finally, the Memorandum and the consultation process were widely discussed and publicised in the media including television, radio and the press.

2. Lifelong learning strategy framework

Education reform started in Lithuania in 1990. Initially, adult education was given high priority. Serious discussions on lifelong learning started in 1998 with the formulation of priorities for the second stage of education reform. In 1999, a working group was established to formulate an education development strategy with the key aim of creating pathways between different sub-sections of the education and training system. In June 2001, the first meeting of the Education for All National Education Forum took place. The main objective was to prepare an action plan to ensure universal and quality basic education as a foundation for lifelong learning. Discussions on lifelong learning still tend to see adult education as an answer to providing everyone with basic education rather than continuing training.

Nevertheless, the mission statement of the Ministry of Education and Science states the ambition to “provide conditions for lifelong learning in a changing democratic society”. The President also issued a statement about the consultation process promoting the idea of lifelong learning.

As a consequence of the consultation process, there were some proposals to improve the strategic framework. The Parliamentary Committee on Education, Science and Culture proposed to the Ministry of Education and Science that a working group be set up. This would also include the Ministries of Economy and Social Security and Labour. It would review the legal preconditions for lifelong learning in Lithuania, and submit a draft strategy on lifelong learning by the end of 2001 to the Committee.

As a general conclusion of the consultation process, three objectives for a national strategy on lifelong learning were formulated:

1. to stimulate learning motivation and to develop learning skills at pre-school and basic education level to counteract early school drop-outs;
2. to implement accumulative learning achievement certificates (learning portfolio) at post-compulsory and further education levels with the aim to remove existing barriers between different sub-systems and types of training, and motivate the individual and employers to invest in training;
3. to increase the involvement of non-governmental organisations and social partners in adult education.

Overall, the report shows that most relevant issues and topics were discussed, however, the traditional sector-dominated approach prevails with the stress on adult education.

3. Challenges and obstacles in translating lifelong learning into reality

The report states that lack of funding for human resources development is the main obstacle to the development of lifelong learning. In an opinion poll, educators rated the six key messages according to importance. Most importance went to "more investment in human resources" followed by "new basic skills for all" and "innovation in teaching and learning". Other surveys show that only 10-20% of companies invest in human resources development. While trying to increase funding for human resources development, it will be a challenge to reconcile the different attitudes as to who should take the initiative and who should pay for training. Whereas trade unions believe that training costs should be shared between employers and the state, a survey amongst managers showed that 45% of managers thought that employees should cover the costs against 40% who thought it should be the employers.

Other challenges described in the report include the lack of computers, computer literacy and Internet availability; limited understanding of the term "technological culture"; and limited appreciation of civic education. The report also notes that the education system is not sufficiently geared to address the needs of different pupil groups and is not able to avoid a high incidence of drop-outs. Vocational schools are still seen as producing graduates without skills relevant to the labour market and information on learning opportunities and the labour market situation does not reach the user. It is also recommended that the involvement of social partners in training be increased.

In addition to these challenges, in its discussions on and preparation for lifelong learning, Lithuania must view the entire education and training system as a whole; it should not see it as a series of independent sub-systems.

4. Concrete proposals for action

4.1 National level

The report mentions a series of suggestions for national action made during the consultation process. The main suggestions are summarised here. The suggestions were made by participants, some individuals, some representing institutions.

🔑 Key message 1: new basic skills for all

Access to new basic skills for all should be improved by opening up general education schools to parents and to clients of the labour exchange; by establishing “second chance” schools; by developing the network of adult education institutions and folk universities; by introducing assessment of basic skills; by foreseeing continuity in the training of basic skills, and by individualising the content and the process of training.

🔑 Key message 2: more investment in human resources

- Taxation policies should be used to encourage training;
- state subsidies for training should be equal to personal investment;
- special funds should be established to help adults to acquire the first qualification and to retrain elderly people;
- a state strategy should be prepared for human resources development and should stress vocational education as well as general education and active citizenship.

🔑 Key message 3: innovation in teaching and learning

- The Lithuanian school system should cater more for different pupil groups at risk of dropping out;
- the knowledge and skills acquired in vocational schools should be more relevant to the needs of the labour market. A possible option is to create better links between schools and businesses by setting up apprenticeship schemes;
- international projects have helped generate a new grasp of teaching learning processes; however, the new approaches should now extend to a larger group of teachers and trainers;
- teachers should be taught how to teach new basic skills and how to stimulate interest in learning;
- a system of in-service training for teachers working with adults should be created;
- vocational teachers should work practice in businesses to get a better understanding of labour market needs.

🔑 Key message 4: valuing learning

- Structures should be created to validate knowledge and skills;
- social partners should be involved in the creation and implementation of concepts and strategies on lifelong learning.

🔑 **Key message 5: rethinking guidance and counselling**

- In general, the whole system of guidance and counselling should improve; this includes setting up special centres for vocational guidance and counselling;
- national TV should provide information on learning possibilities.

🔑 **Key message 6: bringing learning closer to home**

- More effective use should be made of institutions such as museums, libraries and culture centres for the purposes of lifelong learning and staff should receive pedagogical training;
- distance learning should be further developed through the continued expansion of the network of distance learning classes, the diversification of courses offered and the upgrading of teachers' capacities in distance learning methods;
- the distance learning infrastructure should be provided by the state but participants should cover running costs.

While general, the proposals provide insight into the issues and concerns expressed by those involved in the consultation process.

This also shows that the discussions - e.g. in the regions - concentrated on the education and training system now and how to improve it with little attention to lifelong learning systems.

4.2 *European level*

For actions at European level, these were the main suggestions to emerge from the consultation process.

🔑 **Key message 1: new basic skills for all**

- Actions promoting the development of social skills and active citizenship should be expanded from the European Union to the candidate countries;
- a fund should be set up to help smaller countries to adapt new computer training programmes.

🔑 **Key message 2: more investment in human resources**

- A competition should be organised at European level on best practice in investment in human resources.

🔑 **Key message 3: innovation in teaching and learning**

- Actions at European level should be promoted to develop integrated teaching programmes and to stimulate the exchange of information.

🔑 **Key message 4: valuing learning**

- A European network of national institutions in charge of licensing education institutions and programmes should be developed;
- a European level initiative on the development of quality assurance in the non-formal sector should be developed.

🔑 Key message 5: rethinking guidance and counselling

- A European labour centre should be created to ensure the Europe-wide availability of guidance and counselling. The European Union should fund the central office and members of the network should fund national and local offices.

5. *Examples of good practice*

Though the discussions in Lithuania concentrated more on future needs, a few examples related to the implementation of lifelong learning:

- an investment programme for the provision of computers and training teachers in information technology skills is being under implemented. The Ministry aims to have one computer per ten pupils in ninth to twelfth grade by the end of 2003;
- the Lithuanian Junior Achievement programme is an example of entrepreneurship training for secondary school students. The programme provides basic understanding of the functioning of a market economy and companies; 186 schools are involved in the programme, and the number increases every year;
- to overcome the lack of information technology skills amongst teachers, Klaipeda district inferred that a number of pupils were fully computer literate and used them to train the teachers.

6. *Lifelong learning indicators*

To monitor the implementation of lifelong learning, Lithuania uses the following indicators:

- participation rates in pre-primary institutions;
- participation rates in formal education and training (elementary, basic, secondary, vocational and higher education);
- drop-out rates;
- participation of adults in formal education (e.g. correspondence courses and evening courses);
- participation of adults in labour market training;
- percentage of businesses that invest in human resources development.

Lithuania also suggests the adoption of the following indicators:

- attainment levels in education and training of the adult population according to age group;
- internationally comparable statistics on investment levels in human resources development by the state, businesses and households, respectively.

Malta

1. *The consultation process*

The lifelong learning consultation in Malta was organised by the Ministry of Education. It was supported by a grant from the Commission.

A working committee was set up for the facilitation of the process. This committee was composed of 10 representatives: six from the Ministry of Education; one from the Employment and Training Corporation - the agency of the Ministry of Social Affairs in charge for public employment service - two from the university; and one from the civil society. The committee's main tasks were to engender discussions, get reactions to the six key messages and prepare the final report. The committee also made recommendations to the Minister of Education to continue the consultation process - and thereby develop a "National Strategic Plan on life long learning for Malta".

More efforts could have been made to include social partners, non-governmental organisations and other ministries' representatives in the working committee. The Ministry of Education was over-represented.

The national consultation process was conducted during May-June 01. It included a press conference of the Minister to inform the general public; advertisements in newspapers; and the use of information technology - for example, the Ministry of Education website and emails sent to structured networks of stakeholders in the educational field.

The dissemination of the Memorandum on lifelong learning, including the distribution of a questionnaire, was widespread. All inhabitants of Malta could access information on lifelong learning within a webpage with possible contact via an email address.

The Minister of Education joined the two consultation conferences on May 26th and June 16th. More than 300 representatives from councils, commissions, institutions, associations, social partners and public and civil society groups attended these conferences. The discussions were well organised and supported by workshops. Upon conclusion, six experts analysed the questionnaire responses and prepared six papers for the final report.

The Ministry of Education took the process very seriously. Much was done to inform the entire population about the Memorandum and the continuing consultation process. To the largest possible extent, everyone involved in education took part in the discussions. Even if some themes were less discussed (i.e. guidance and counselling) the final results represent a consensus from all participants in the process.

2. *Lifelong learning strategy framework*

In Malta, the concept of lifelong learning is considered mostly by the Ministries in charge of educational issues (Ministry of Education, Ministry of Social Affairs) and the civil society. The principle of lifelong learning is already reflected in legislation (i.e. reform of the national curriculum, deed of foundation of the Malta College for Arts Science and Technology (MCAST), development of a Foundation for Educational Services including the Institute for Child and Parents, Employment and Training Corporation). There is a strong commitment from the Minister of Education to come up with a country strategic plan on lifelong learning in the year 2002.

2.1 What is meant by lifelong learning in Malta

In Malta, the concept of lifelong learning is meant as an integrated concept that concerns everyone from birth to death. It focuses not only on vocational development but it also emphasises the achievement of the people themselves.

The role of the state is to create good conditions to implement lifelong learning strategies in the interest of each citizen.

In addition to the formal role played by the state, the social and economic partners, much emphasis is on the role of the civil society in general - the church, political parties, non-governmental organisations - in contributing to informal learning.

2.2 Developing coherent and comprehensive lifelong learning strategies

Following the consultation process the Lifelong Learning Working Committee made recommendations to the Ministry of Education. The most important is to set up in the near future a National Commission on Lifelong Learning (composed of representatives of major stakeholders) that would complete the national consultation process by June 2002 and support the development of a national policy and a strategic plan on lifelong learning. Among its responsibilities it should aim to inform the general public; stimulate the role of relevant participants; analyse the international context; and recommend legislation.

3. Challenges and obstacles in translating lifelong learning into reality

The Maltese report examines the possible obstacles to be tackled before developing a lifelong learning policy in the country.

- The role of the state is questioned as regards to its responsibility in ensuring quality provision in both initial and adult education and the clarification of concepts and definitions for lifelong learning matters. The state is also requested to move from provider to partner and facilitator;
- the social partnership has to be reinforced in the context of lifelong learning, in particular as regards definitions of curricula and the assessment of formal, non-formal and informal learning, and guidance and counselling;
- the modernisation of the guidance and counselling system requires specific attention to raise the awareness and motivation of the Maltese. Ways of providing guidance and counselling services are not sufficiently resolved to ensure full and permanent access both in formal schooling and in the working environment. The professional training of guidance counsellors is weak;
- alternative arrangements and incentives like flexitime, part-time work, educational leave, tax relief, employee education funds or vouchers are not systematically proposed;
- there is a lack of reliable data and research as regards investment in human resources in Malta. This would ease the definition of a sound strategy for lifelong learning.

Concerns are also raised concerning the quality of delivery of training in a lifelong learning framework. Both pedagogical attitudes (of learners and teachers) have to be transformed in a more

interactive process. In the case of eLearning – fast becoming a key educational tool - there are concerns that learning may become an isolated activity. In addition, the country lacks the appropriate skills to manage schools for lifelong learning or community learning centres.

The report also challenges the capacity of the country to develop an accreditation system that enables all citizens to get a recognised qualification.

4. Concrete proposals for action

The report underlines the recommendation that the Minister of Education set up a National Commission on Lifelong Learning that would complete the national consultation process by June 2002 and formulate a national strategic plan. In addition, the setting up of a National Resource Centre on Lifelong Learning, a driving force to implement national policy, is a positive achievement. Finally, the report pinpoints the need for the establishment of a national database of research staff, non-formal and informal learning opportunities and good practice examples.

4.1 National level

🔑 Key message 1: new basic skills for all

- Set up preventive and early intervention programmes to cut the incidence of underachievers;
- develop research to analyse risk group problems and identify systemic causal factors;
- use trained retired teachers to provide basic skills;
- develop a data base of effective training institutions that deliver lifelong learning;
- develop standards for non-formal education;
- integrate humanistic values in all curricula.

🔑 Key message 2: more investment in human resources

- Conceptualise and define in flexible ways the professional learning environment;
- develop the embryonic social partnership;
- consider lifelong learning as a human right;
- use champion models to convey the message on gender issues.

🔑 Key message 3: innovation in teaching and learning

- Monitor and document good learning practices;
- link all libraries via computer; develop bridges at university level among faculties;
- encourage eNetworking;
- develop training of trainers;
- train all persons involved in one way or another in training (educators, journalists, librarians, social workers, managers, social partners, priests, etc.) to adopt new approaches including new technologies and adult teaching;
- all training activities should be learner- oriented.

🔑 **Key message 4: valuing learning**

- Develop the Accreditation of Prior and Experiential Learning;
- further develop instruments to evaluate both non-formal and informal learning;
- further research European experience to ensure comparability of standards;
- reinforce social partnership to develop a culture of self-directed partnership.

🔑 **Key message 5: rethinking guidance and counselling**

- Support the development of innovative and client-oriented approaches;
- streamline resources and guidance and counselling provision by setting up a national resource centre;
- provide training for guidance and counselling professionals.

🔑 **Key message 6: bringing learning closer to home**

- Manage community learning centres which will require well prepared co-ordinators with skills exceeding normal school director competencies;
- set up information campaign;
- mobilise and rationalise stakeholder resources;
- decentralise school management.

4.2 *European level*

As a general statement, the report considers the Memorandum approach too restrictive when considering lifelong learning for an already literate person. The report mentions that learning must be seen to be more than vocational and as a way of promoting active citizenship.

More specifically the report makes the following suggestions:

- the European Union should promote the exchangeable learning credit scheme that allows an exchange of skills and competencies among learners in different fields;
- the Commission should organise a conference on recognition and assessment of non-formal and informal learning to propose a campaign for common action, to develop networking and to share good practice among member states and candidate countries;
- dissemination of research should be organised by a trans-national agency;
- concepts concerning diverse forms of self-directed learning need to be explored in a trans-national forum;
- the European Union should support and publicise international initiatives that can allow each individual to update their skills (i.e. Massachusetts Institute of Technology course material);
- support should go to encourage the development of the lifelong learning concept in tertiary countries, using the experience of the European member states (including candidate countries).

5. Examples of good practice

- A more ambitious project has already been launched as part of the national curriculum reform. This transforms local schools into community learning centres. The project asks much of every stakeholder at community level and at the same time a clear commitment from the state to support the physical and administrative modifications vital to success;
- the setting up of an Institute for Child and Parent Learning Support within the Foundation for Educational Services meets the needs of parents with children facing failure at school. The Grundtvig programme may well support this project;
- the existing School Girl Mothers' Unit within the Ministry of Education aims to support young mothers wishing to continue their schooling;
- the development of young enterprise schemes is expected to support students to prepare for the realities of work while still at school.

6. Lifelong Learning indicators

No proposal has been identified in the report.

Poland

1. The consultation process

The consultation process was carried out under the responsibility of the Ministry of Education (Department of Strategy and Development) at intra- rather than inter-ministerial level, and is not comprehensive. Other ministries had been asked only for written comments on the Memorandum whereas neither social partners nor the regional level were involved at all. The comments and proposals submitted mainly derive from a meeting of the directors of the major educational institutions organised by the Ministry of Education. The national report was rather short. Although the National Observatory has been partly involved - it organised the responses from vocational counsellors - the consultation process only concerned the educational community at central level. The Ministry of Education has not asked for a grant for the consultation process from the European Commission, and the final translation of the Memorandum is still incomplete.

2. Lifelong learning strategy framework

The lifelong learning concept is integral to the continuing education system reform, already partly included into the reform process prior to the publication of the Memorandum. Furthermore, the lifelong learning concept has been established as one of seven key objectives of the 'Education Development Strategy for 2001-2005' recently prepared by the Ministry of Education and due shortly for submission to the Government and Parliament. It is difficult to assess whether the new education strategy provides a coherent vision of lifelong learning, as this document is not yet available in English, and the country report does not refer to it in detail. However, we may assume there is still no national consensus on the crucial phase of the education reform process in Poland. This is because the Government's reform proposal on secondary education has recently been rejected by the parliament - on the eve of political elections at the end of September 2001.

3. Challenges and obstacles in translating lifelong learning into reality

According to the report, there are various obstacles to translating lifelong learning into reality. These include the division of the education system into separate sub-systems; the lack of ways to assess, recognise and certify qualifications acquired outside the formal education system; the insufficient provision and quality of guidance and counselling; and the limited access to computers and the Internet.

In addition, the Vocational Education and Training Progress Review by the European Training Foundation (2001) has revealed several further challenges and obstacles. For instance, the idea of lifelong learning is still not part of society's mentality. There is no sound approach to continuous vocational training with clear definitions of the participants' roles. The initial vocational education and training system does not meet the needs of individuals or the labour market. Co-operation among different stakeholders needs strengthening along with the involvement of social partners.

Ambitious reform targets were set in 2000 with the “National Strategy for Employment and Human Resources Development 2000-2006”. However, implementation is scotched by severe financial shortfalls at both national and local level.

4. Concrete proposals for action

The report provides various proposals for action limited to key messages 2 and 5 only. It does not make priorities. However, it stresses several times the importance of the financial dimension, Internet and database tools, co-operation and international information exchange, certification issues and promotion campaigns. Some of the proposals are already concrete and relevant to the current situation, but many of the proposals are more general; they express ideas rather than intentions and require more development.

4.1 National level

🔑 Key message 2: more investment in human resources

- It is proposed to strengthen and extend the existing support structure (paid training leave, flexible working hours, tele-working, subsidies, non-commercial loans, establishing training and development funds, diversifying funding by involving foundations and associations, etc.);
- professional development should be promoted through financial and other incentives (e.g. recognition of work experience, promotion at work);
- preparation for Structural Funds needs to be reinforced (information campaign, training of government advisors, reduction of language barriers, simplification of procedures);
- investment in equipping local centres such as libraries with adequate information and communication technology facilities to widen access for the public is a priority.

🔑 Key message 3: innovation in teaching and learning

- It is proposed to create training opportunities for using information and communication technology in teaching (organising information and communication technology-supported teaching and learning processes, developing appropriate material);
- professional development of teaching staff for adults is a key issue to be addressed;
- quality control and certification mechanisms for training courses need developing;
- other issues mentioned include the diversification of learning opportunities for all (formal, informal, non-formal), extension of distance and eLearning possibilities.

🔑 Key message 4: valuing learning

- It is advised to develop legislation for recognising qualifications acquired outside the formal education system, in particular through work experience;
- certification rules need to be developed and made available to the public.

🔑 **Key message 5: rethinking guidance and counselling**

- Emphasis should be put on the professional development of staff (inter-personal skills, use of databases, gathering and selecting information, and positive approaches to labour market developments) and to the improvement of information systems and tools.

4.2 *European level*

A number of fragmented, less urgent proposals for action at European level are included under the different sub-chapters. These include strengthening co-operation among research institutes and agreement on common research objectives; exchanging experience and good practice (including information and communication technology teaching materials); developing internationally agreed criteria and indicators for monitoring and evaluation; fostering international co-operation and training possibilities for teachers of adults and guidance and counselling staff; standardising professional requirements for these target groups; exploiting information and communication technology tools for co-operation and dissemination purposes; creating an international committee for recognition and certification of competencies; fostering international co-operation among non-governmental organisations.

5. *Examples of good practice*

The report does not make any concrete reference to good practice examples.

6. *Lifelong learning indicators*

The Polish report does not contain any information on indicators.

Romania

1. *The consultation process*

The Ministry of Education and Research was mainly responsible for the consultation process in Romania. The process included the translation of the Memorandum into Romanian; its distribution to some 3,000 institutions; the publication on the Ministry's web site of the Romanian and English versions; various seminars in different localities-namely Timisoara, Cluj, Constanta, Galati and Brasov; a national forum in Bucharest; and a survey of over 1000 public and private institutions and non-governmental organisations. County School Inspectorates, County Employment Offices and Chambers of Commerce completed 300 Questionnaires. The survey aimed to get reactions to the messages of the Memorandum and to identify priorities and examples of existing relevant experiences.

A wide range of key stakeholders was consulted in the overall process. This include representatives from the ministries, social partners, non-governmental organisations, professional institutions; education and training research establishments; governmental and professional organisations; formal and non-formal educational establishments at all levels. The latter included regional training centres, universities, vocational training schools and special vocational schools.

The commitment shown by the Romanian Ministry of Education and Research in carrying out this consultation process is remarkable. However, given the short time, the consultation process, although very wide, fails to provide the results of in-depth analysis. Participation in the Forum at Bucharest prompts the following comments on the organisation of the process:

- the consultation mainly involved institutions, without consideration for the role that businesses, social partners and individuals play in the lifelong learning process. This implies that the aims of the process may be unclear;
- the process is seen as a tool to promote the latest developments in education and, as such, a task only for the Ministry of Education and Research;
- the process was not based on the achievement of specific and concrete aims. Hence, conclusions are not founded on a clear vision for future development and responsibilities have not been defined.

Lifelong learning indicators will feature in the data collection system thanks to the co-operation of the National Board of Statistics. These indicators will also appear in the annual ad-hoc report prepared by the National Observatory at the request of the European Training Foundation.

2. *Lifelong learning strategy framework*

In Romania, awareness of the importance of lifelong learning has been increasing over the last five years. According to the report, the Government took its principles into account when preparing new legislation and strategic documents. Lifelong learning principles are also directly linked to the priorities of human resources development, which were, in turn, a postscript to the 2000 Romanian National Development Plan. Nevertheless, the concept of this strategy focuses mainly on the role of education.

The new law on adult training, presently under discussion in the Parliament, is also an important step towards the adoption of lifelong learning principles. This law aims to arrange accreditation for the institutions that will provide adult training. Existing legislation already supports training for the unemployed and for adults to complete elementary and secondary education.

3. Challenges and obstacles in translating lifelong learning into reality

The Romanian report shows that the country's poor economic performance is the main barrier to realising the principles of lifelong learning. It also refers to a vicious circle of human resources. On the one hand, the country's reform process will not reach its targets without the support of adequate human resources. On the other hand, poor economic results compromise the level of investment going into the development of human resources. In addition, as the economic situation is causing a serious "brain drain", especially of medium to highly qualified people, the country could soon sustain a downturn in the quality of human resources.

🔑 Key message 1: new basic skills for all

- The reform of the curricula adopted in 1999 through the Phare Vocational Education and Training Programme anticipates this message by introducing citizenship education and technology into the core curriculum for compulsory schooling. In the new curriculum, outdated mono-disciplinary subjects have made way for seven curricular areas that favour competence-centred and interdisciplinary approaches such as language, communications and man and society.

However, there are major constraints which still blunt the impact of curricular reform:

- the teacher training system still fails to reflect changes introduced in the new curricula;
- the present provision of adult training is not based on the acquisition of basic skills;
- the provision of adequate training in rural areas is uneven due to lack of equipment.

In addition, the courses available to provide the possibility for workers to requalify following the restructuring of the big state enterprises do not cover basic skills.

🔑 Key message 2: more investment in human resources

The investment in education in 2000 was lower than 4% of the Gross Domestic Product stipulated in the Law of Education. There are no tax incentives for people or companies to invest in training.

🔑 Key message 3: innovation in teaching and learning

Innovation in teaching and learning largely depends on the availability of resources for training teachers. Most Romanian teachers were trained during the 1960s and 1970s and still follow a traditional approach based on knowledge rather than know-how. Through the World Bank and the Phare Vocational Education and Training Programme, courses for teachers and principals training have been organised, but only on a very limited scale.

🔑 **Key message 4: valuing learning**

The Romanian report stresses that this message is the most problematic and should be seen as a top priority for future development. This is the outcome of (i) the traditional educational policy, which has always given priority to formal education and initial training; (ii) the lack of adequate legislation to promote continuing training; and (iii) the almost total lack of valuing non-formal and informal training.

🔑 **Key message 5: rethinking guidance and counselling**

Romania's tradition in this field dates back to the 1920s when a network of institutes for social assistance was set up. However, there are some weaknesses in the system – such as poor demand for guidance and counselling services - which are anyway largely for young people and school leavers rather than adults. Also, with the main focus on vocational and educational aspects, social and civic aspects go by the board.

🔑 **Key message 6: bringing learning closer to home**

Romania recognises that eLearning plays a very important role in bringing learning closer to home, and that more and more young people use the Internet. However, this depends on the personal interest and resources of the individual or on the availability of funds from donors.

4. Concrete proposals for action

The proposals are based on the answers to the 300 questionnaires previously mentioned. These results appear in a “shopping list” of identified general priorities, without specifying why, when and how these actions should be undertaken. Very often, these priorities overlap or appear several times. Furthermore, they don't refer clearly to a specific key message.

The recommendations include:

- support for non-formal and informal learning through social and managerial recognition, extension and diversification of learning provision;
- promotion of training and education incentives within economic, social and regional programmes;
- provision of an increased and diversified number of training opportunities to stimulate an higher demand.

4.1 National level

🔑 **Key message 1: new basic skills for all**

The report recommends the development of a system for adult education that focuses systematically on the development of basic skills for all.

🔑 **Key message 2: more investment in human resources**

The report recommends a larger educational budget so that more social partners can set up incentives for individuals willing to invest in training. The incentives might be paid leave during

training; the provision of community grants; and tax breaks. When implementing European Social Fund type projects, these should be decentralised and local communities should become familiar with them. The projects should be given a higher profile and the spread of best practice cases should be eased.

🔑 **Key message 3: innovation in teaching and learning**

The Romanian report stresses the importance of continual support for the innovation of teaching and learning methodologies. It refers in particular to the introduction of information and communication technology in the teaching and learning process and to the contribution in this field from the three programmes Tempus, Leonardo and the Phare Vocational Education and Training. This network must be sustained as it can play a very active role in the dissemination and adoption of lifelong learning principles.

🔑 **Key message 4: valuing learning**

There are several strategic documents under preparation or revision. These include the Joint Assessment Paper, the Law on Employment and Social Security, and the 2002 version of the National Development Plan. These should stress the importance of training and investment in human resources development, and thereby give learning its true importance and value.

🔑 **Key message 5: rethinking guidance and counselling**

Analysis of the survey underlines the need to promote a more qualified specialisation in this field. In particular, it should address the issue of organising services based on individual needs and not on a standard offer by the institution. Communities and enterprises should be deeply involved in this process so as to secure a better link with the world of work.

🔑 **Key message 6: bringing learning closer to home**

Here, European projects have made a very valuable contribution. The report recommends making previous experiences more sustainable and seek additional contributions from donors.

4.2 *European Level*

There are no suggestions specific to the six messages in the report.

5. *Examples of good practice*

The list includes projects of limited dimension. Mainly funded by international donors, these refer to both initial and continuing training and are not really relevant to a specific key message. The only exception is the project mentioned in key message 4, which represents an important milestone in the process of valuing learning.

🔑 **Key message 1: new basic skills for all**

Projects have been implemented with the financial support of donors to ensure equal opportunities of education for Roma population so that they can promote their socio-occupational integration. Other projects have also been implemented to secure the completion of compulsory education for disadvantaged groups.

🔑 **Key message 2: more investment in human resources**

Through the parallel funding project in the county of Constanta (European Training Foundation with France, Italy and the Flemish Community of Belgium) some vocational schools have become providers of continuing training. They also propose new and diversified training opportunities, thereby stimulating investment in human resources development.

🔑 **Key message 3: innovation in teaching and learning**

In Alba Julia, a project has been implemented to train teachers in curricula development, assessment and evaluation.

🔑 **Key message 4: valuing learning**

The Council for Occupational Standards and Assessment was set up with the financial support of the World Bank to ensure the recognition of professional competence based on occupational standards.

🔑 **Key message 5: rethinking guidance and counselling**

Services for giving young people educational and vocational guidance have been set up in disadvantaged areas. The services implied the production of material and the training of specialities in almost 2000 schools.

🔑 **Key message 6: bringing learning closer to home**

Information and communication technology has been playing a very important role in bringing learning closer to home and many projects have been implemented in this field mainly with the help of the international donors' community.

6. Lifelong learning indicators

There are no specific proposals in the report.

7. Aspects not covered by the Memorandum

The report acknowledges that the consultation process has helped to provide information to people at the Lisbon Conference and on new priorities for education and training during integration with the European Union. The report concludes that Romanian participants in the process see the Memorandum as a major tool for guiding pre-accession activities.

Slovakia

1. *The consultation process*

The State Secretary of the Ministry of Education was appointed National Co-ordinator of the consultation process. He set up a tripartite steering committee which comprised representatives of central state administration authorities. These included the ministries of education, labour, economy, agriculture, social partners, the national Leonardo da Vinci agency and the European Training Foundation-funded Slovak National Observatory on vocational education and training. The aim was to help co-ordinate the process and in particular to organise the national conference on the Memorandum.

The national Leonardo da Vinci agency set up the project's administration and ran the above mentioned conference. The Slovak vocational education and training national observatory took care of the agenda, and edited the experts' report.

The key steps of the process included:

- Publication of the Memorandum in Slovakian;
- Letters from the national co-ordinator to a wide range of state administration authorities, public institutions working in relevant sectors, representatives of social partners and non-governmental organisations. This asked for their views of the Memorandum;
- Nomination of 14 experts to lead six sub-groups to work on the key messages whose principal contribution was to prepare relevant documents for the national conference together with a final report. They had also the opportunity to organise individual consultations with the wider public on the different messages;
- use of the Ministry of Education web-site for a direct and broad exchange of views;
- general information of the public through the media (television and press);
- live informal debate in an Internet newspaper under the aegis of an expert group in response to an article by a journalist;
- organisation of a national one-day conference with some 70 participants. The European Training Foundation was asked to do this and made a contribution. The conference comprised plenary sessions and six workshops on the six messages.

The conclusions of the thematic workshops, the general conclusions of the conference and the experts' reports on the key messages comprise the main official documents that emerged from the consultation process. They also summarised its results.

As a whole, the consultation process welcomed the participation of all key and relevant stakeholders (for institutions consulted, see the report).

There were various key weaknesses. The conference was too short for a thorough debate; there were translation problems with the Memorandum, and these sometimes put discussions off track at the Conference; some participants failed to file contributions - although the final report contains an annex with "authentic quotations by participants on the process"; too few thoughts on statistics and indicators appear; no solid proposals for action was made.

2. Lifelong learning strategy framework

The report stresses that the European Commission's initiative provides a topical and relevant impetus for framing a national strategy for lifelong learning. It also outlines some key issues linked to the development of such a strategy in Slovakia:

- closer inter-sectoral cooperation within public administration;
- effective cooperation with social partners;
- need for a holistic view of lifelong learning;
- need for coherent measures to make this a government priority.

As a further step in developing a national strategy, the report proposes to extend the mandate of the expert group established during the consultation process with the aim of completing the preparation of a Slovak White Paper on Lifelong Learning and draft an Action Plan.

As part of the background documentation for the national conference, the expert group prepared a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) of the situation in Slovakia as regards each of the six thematic areas covered by the Memorandum messages. The findings of this analysis are in the final report.

3. Concrete proposals for action

3.1 National level

🔑 Key message 1: new basic skills for all

- Development of new learning contents and methods should match the needs and characteristics of individual target groups;
- emphasis on the stimulation of foreign language learning through informal learning;
- establishment of diagnostic centres that constantly monitor basic skills at corresponding performance levels; More legislation to confirm every individual's right to lifelong learning.

🔑 Key message 2: more investment in human resources

- Analysing the comparative advantages of two schemes - education Fund and individual learning accounts - so as to identify and draw on their complementary aspects;
- allocating part of the "social fund" (which every economic entity in Slovakia has to set up by law as a percentage of its payroll) for the further training of staff;
- transposition into Slovakian law of the International Labour Organisation Convention No. 140 on the obligations of the employer to provide employees with paid educational leave.

🔑 **Key message 3: innovation in teaching and learning**

- Wider and more systematic application of modular credit-based training;
- creation of a voluntary “computer field service” with state support, which will assist the development of information and communication technology in specific areas with the support of experts;
- setting of quality standards and accreditation arrangements for teachers, tutors and programmes in adult education.

🔑 **Key message 4: valuing learning**

- Guarantee the independence of institutions responsible for recognising the outcomes of education or the accreditation of education programmes. These institutions should allow for all key stakeholders to participate;
- undertake to analyse the suitability of an adapted introduction of the accreditation of prior and experiential learning system into the national context.

🔑 **Key message 5: rethinking guidance and counselling**

- Make guidance and counselling a continuous service for all based on quality standards and arrangements for the accreditation of institutions providing this service;
- make available and connect electronically existing information databases both for career advisors, irrespective of institutional background, and for clients;
- reform the training system for educational counsellors at schools and create new models for training vocational and career advisors taking into account the key skills needed for the carrying out work with different groups of clients.

🔑 **Key message 6: bringing learning closer to home**

- Enact legislation to support comprehensive use of schools and other educational or cultural centres as local learning sites.

3.2 *European level*

🔑 **Key message 2: more investment in human resources**

- Training of facilitators, with European Union assistance, to spread knowledge on European Social Fund project design.

🔑 **Key message 3: innovation in teaching and learning**

Initiate a discussion at European Union level aimed at:

- setting non-compulsory minimum standards for the European extra-curricular environment;
- setting European benchmarks for schools’ facilities;
- setting European benchmarks for the status of educators;
- identifying key issues related to the creation of the European education environment.

🔑 **Key message 4: valuing learning**

Consider the development of:

- a European initiative analogous to the Bologna process that moots a university education common throughout Europe; likewise, vocational training and education;
- a European code of good practice for recognition of the results of non-formal and informal learning;
- reinforced international co-operation in the creation of non-formal education modules and their harmonisation with the European Credit Transfer System and the award of credits for skills acquired through practical activities;
- international standards of qualifications in specific occupations through the active involvement of international networks of organisations associating people in these occupations

🔑 **Key message 5: rethinking guidance and counselling**

- Setting up of a European education portal equipped with a structured organisation of thematically classified information on educational materials, including up-to-date information on media education programmes, and other current high quality media products.

4. Examples of good practice

The Slovak report includes an outline description of initiatives at project level with a particular relevance to key messages 2, 4 and 5

5. Lifelong learning indicators

There is no reference in the report to this subject.

6. Aspects not covered by the Memorandum

The report focuses on:

- the request for clarification on terminology and definitions with particular regard to the lifelong Learning definition and the concept of new basic skills. In this context, there is a move to set up an expert working group at European level to address terminology issues;
- the need to take a more integrated view of the three dimensions of the learning process: formal, non-formal, informal.

Slovenia

1. *The consultation process*

The organisation of the consultation process of Memorandum on the lifelong learning was entrusted to the Education Development Unit of the Ministry of Education, Science and Sports. This unit is the co-ordinating body for the National Councils of Experts for General Education, Vocational and Technical Education and for Adult Education in Slovenia. At political level, responsibility for the consultation process was taken by State Secretary of Education Mr. Mirko Zorman. A national working group was established (in which all six public education support institutions were represented) to take stock of what is going on in the area of lifelong learning and to co-ordinate the national consultation process. The consultation process itself was organised with support of the Association for Adult Education.

The consultation started after the meeting of the national co-ordinators that took place in Brussels on March 19, 2001 with an invitation letter by the Minister of Education, Science and Sports for an active participation in the consultation process on the Memorandum on lifelong learning to a country wide audience, including all ministries, social partners, professional associations, educational support institutes, school centres, local communities, non-governmental organisations and public and private training providers. With a view of preparing a response on the Memorandum the following actions were undertaken:

- translation of the Memorandum into the Slovene language;
- presentation of the Memorandum at the annual adult education conference;
- preparation of articles;
- discussion of the Memorandum by the 1200 teacher circles (all 30.000 teachers were involved);
- publication and dissemination of the Memorandum in hard and electronic copy;
- production of a special Memorandum web site with electronic discussion groups related to the six key messages;
- organisation of six regional workshops, each dedicated to one of the key messages, and with participation of regional members of Parliament, policy makers, social partners, companies, education and training institutions, non-governmental organisations and private citizens (40-50 participants per workshop);
- organisation of an international final conference with international participation to present and discuss the results of the consultation on the six key messages (70 participants).

On the occasion of various other educational events in the country the Memorandum was presented and discussed. In a very short period of time a wide audience across the country was mobilised and involved in the consultation process. However, overall, the consultation remained a bit biased towards the adult education community, which is not surprising given the long tradition of adult education in Slovenia and the fact that the sector of non-formal adult education has been the most innovative one of the whole education system. There is still a strong linkage between lifelong learning and adult education and that has prevented the consultation process from addressing the more systemic issues as implied by the lifelong learning concept applied in the Memorandum. On the other hand, the consultation process provided a new opportunity to bring lifelong learning

issues under the attention of a broad public and there is a good basis laid for further work as a large group of people across society now shares a more or less common understanding of the main lifelong learning issues.

The report concentrates above all on analysing the situation as regards lifelong learning in Slovenia and presents proposals for action and examples of good practice from the country. It does not provide much input to possible action at the European level.

2. Lifelong learning strategy framework

Issues relating to lifelong learning have already been included in the White Paper on Education in Slovenia, which resulted from the reform debates that started in the late 1980s. They have also been included in the major reform initiatives during the 1990s, including those supported by Phare. While the principle issues of lifelong learning may have been pushed into the background during the years of hard practical work of implementing curricular reforms, awareness among national policy makers has gradually developed that lifelong learning goes beyond the establishment of an adult education system. However, at the level of educational practitioners this awareness is far less developed. Lifelong learning is one of the key priorities in the National Development Plan and the relevant ministries are now challenged with translating the idea of lifelong learning into practical educational decisions and measures.

3. Challenges and obstacles in translating lifelong learning into reality

The main obstacles for translating lifelong learning into reality are to be found in the over-estimation of formal education in Slovene society and in the present institutional setup of the education system which is in many respects still built as a system of separated subsystems which include sub-sector specific legislation, departments in the ministry, expert councils, support institutions, and providers. High on the policy agenda is the reform of teacher training, counselling and guidance, reduction of drop-out, innovations and information and communication technology in schools and the further integration of formal and non-formal forms of learning. Legal conditions for the latter have been created by the Vocational Qualifications Act of 2000, which allows for the assessment and recognition on the labour market of prior learning and work experience. The expected adoption of the National Plan for Adult Education will also provide a framework and funding base for more coherent action in that field. The challenge here will be to relate the development of adult education systematically with ongoing developments in other education sub-sectors.

4. Concrete proposals for action

Proposals for action refer most of all to what has to be done to improve the situation of lifelong learning in Slovenia.

🔑 **Key message 1: new basic skills for all**

This would require a much larger flexibility of curricula and a more student-oriented way of teaching and learning, including for adults

🔑 **Key message 2: more investment in human resources**

This should take into account a different distribution between state, employers and individuals. There are still possibilities to increase funding through fiscal measures, company-based training funds or individual learning accounts. But a more efficient use of existing funding should also be promoted through better co-ordination of various ministries, monitoring and assessment of public funding.

🔑 **Key message 3: innovation in teaching and learning**

It should be promoted by developing a national innovation strategy, enabling teachers to experiment, develop learner-centred approaches and evaluate and disseminate innovative experiences.

🔑 **Key message 4: valuing learning**

Valuing learning should be further promoted by developing the infrastructure for assessment and recognition of prior learning for which the legal basis has already been established. It should also be made possible to have prior learning or work experience recognised within the formal education system and not only on the labour market.

🔑 **Key message 5: rethinking guidance and counselling**

This should lead to further developing occupational guidance in schools and improving the professional standards and networks for guidance in the country. The many existing experimental projects should be integrated into a national infrastructure for guidance and counselling.

🔑 **Key message 6: bringing learning closer to home**

It would profit from the development of materials to support self-directed learning and from the opening-up of existing educational centres to the broad public. There would also be a need to establish good information infrastructures on learning possibilities. Modern information and communication technology could well be used for this purpose.

5. Examples of good practice

The Slovene report contains under each of the key messages long lists of examples of good practice, indicating the existence of a wide variety of quite innovative initiatives. However, most of the examples refer to projects of relatively small scope and limited duration from the area of non-formal learning, either initiated by adult education institutions or by the employment service. Nevertheless, all major ideas launched within the context of lifelong learning have already in one way or another been translated into concrete projects.

6. Lifelong learning indicators

The Slovene report has no information on these.

Annex 2 - Overview by key message of the action proposals and examples of good practice emerging from the national reports

Key message 1: new basic skills for all

1. *Proposals for action at national level*

Defining the new basic skills and their place in the curricula

Cyprus, Hungary, Montenegro and Slovenia point out the need to adopt a **comprehensive definition** which will not make a clear cut distinction between “old” and “new” basic skills. Cyprus suggests a definition of basic skills as “the skills an individual needs to fulfil his potential in society”. According to the above countries, literacy, numeracy and communication (oral and written) are essential to the new basic skills to be possessed and developed in the knowledge society. Besides the new basic skills mentioned in the Lisbon conclusions, they stress the fundamental importance of skills such as problem solving, team working, learning how to learn, skills for working life, family and community, as well as personal and interpersonal skills (development of self-confidence and self-knowledge, creative communication, critical thinking, etc.). Slovenia suggests that creative communication and discussion skills should be nurtured throughout school education starting from the pre-school period.

Cyprus, Lithuania and Montenegro underline that the social skills and the skills for “active citizenship” inspired by the democratic and humanistic values should be an integral part of the curriculum.

Finally, Estonia, Slovakia and Slovenia draw the attention to the fact that the **definition and identification of basic skills may vary across the different countries** since they tend to depend a lot on the values underpinning the cultural, social and economic context of each country.

Hungary puts forward the proposal to prepare a **national programme for the development of basic skills** while Latvia and Cyprus advocate the need for **national standards of basic skills**. Cyprus is in favour of special learning (core curriculum and new materials), evaluation, quality and accreditation arrangements for the entire basic skills education and training provision. Lithuania shares the need for a system of assessment of basic skills while Malta focuses on the development of a quality control system for non-formal education courses on basic skills.

Slovakia attaches importance to the completion of the process – currently underway - of developing **new occupational and educational standards** in a coordinated way, which should encompass all the relevant basic skills.

Cyprus, Estonia, Montenegro and Slovenia place the emphasis on the **links between the development of basic skills and the application of learner oriented processes** with a focus on identifying and building on the learners’ existing knowledge and skills (Cyprus); assessing their

needs (Estonia); making self-assessment an integrated component in all courses (Estonia); departing from the classroom paradigm and nurturing the culture of self-directed learning (Montenegro).

The **need for flexible and open curricula** is highlighted by Estonia and Slovenia. New skills should be systematically incorporated into curricula through an active participation of social partners, parents, teachers and headmasters. Slovenia proposes more ample opportunities for students in the choice of subjects and the transfer between educational programmes as well as the establishment of an interdisciplinary curriculum.

Lithuania, Slovakia and Slovenia point out that the development of **new learning contents and methods should be tailored to the needs and characteristics of individual target groups** so that greater attention is paid to their heterogeneous performance and capacities.

The question of the adequate **preparation of the teachers and trainers** to fulfil their new role in the lifelong learning context receives attention in many reports. According to Bulgaria enlarging the skills of trainers is a priority. Slovenia stresses the necessity of a new approach to the training of educators. Cyprus and Montenegro propose special training and re-training in adult pedagogy to be introduced for basic skills teachers. Latvia draws the attention to the reinforcement of the basic skills education for the teachers and administrators themselves at all educational levels.

Estonia recommends the **use of retired teachers in special classes** to be established for pupils coming from economically weak families. Montenegro also considers the retired teachers as a national resource, which can be tapped more at community level to provide basic skills training.

Universal access to basic skills

Cyprus and Estonia stress the **shared responsibility** of the public, private and third sector (Government, non-governmental organisations, families, individuals) in promoting learning of basic skills.

Hungary, Latvia and Montenegro underline the need for measures to improve the society-wide information on learning opportunities. Montenegro suggests the establishment, effective management and promotion of a **national database** of public, private and community based organisations that offer non-formal and informal **learning opportunities**.

Slovakia considers important to support actions, which aim at systematically identifying and promoting examples of practical experience in the development of new basic skills.

The issue of **widening the role of schools by opening them up to all people** including adults is stressed by Estonia and Lithuania.

Estonia and Montenegro come up with the idea of setting up **lifelong learning centres** offering learning possibilities to wide population groups. The proposal by Montenegro foresees such a centre carrying out a variety of functions besides delivery of basic skills courses, such as identification of learning needs, guidance and counselling services, information provision.

Latvia and Lithuania acknowledge the need to **extend** the provision of catching-up, **second chance education** which should be possible to be delivered also outside the formal educational institutions. Estonia puts forward the idea of setting up **residential schools** especially for children coming from socially disadvantaged families and Latvia would like to see an increase of the higher education sector's role in the basic skills provision. Montenegro underscores the need to strengthen preventive and early intervention programmes to counteract early school leaving. These programmes should be supported by appropriate evaluation and research in order to assess both the factors contributing to the phenomenon of children at risk as well as the outcomes of any measures taken.

Bulgaria points out the need for **upgrading the technical equipment in schools** and Slovakia considers important to reinforce the **networking** of all institutions involved in the area of education and culture (including public libraries, museums, galleries, non-governmental organisations).

Lithuania is of the view that public education programmes addressed to adults should attach priority to the development of new basic skills other than computer literacy and foreign languages since the market offers a lot of possibilities to satisfy the needs in these last two areas. Hungary calls on the employers to support the learning of foreign languages by their employees outside working hours.

Slovakia places emphasis on the stimulation of foreign language learning through informal forms of learning such as:

- greater frequency of subtitled English films on TV;
- exposure to newspaper articles or parts of them in foreign languages and translations of them in the media;
- exposure to English and Slovak words to songs on music programmes and packaging;
- support for the existence of bilingual books, bilingual web sites and bilingual compositions (e.g. in connection with services for tourists) etc.

Estonia and Romania highlight that a particular effort should be made to reduce the existing significant **regional disparities** as regards the access to learning of large categories of the population.

Romania equally suggests that training in basic skills should be incorporated in a stronger way in the **economic restructuring plans** of companies.

Several countries recognise the need for **specific actions to prevent or address the “digital divide”**. Czech Republic proposes a broader access to Internet through schools and local libraries and in parallel negotiation of prices of access with commercial entities. Estonia also suggests that the state should support the development of open public places with access to Internet all around the country and equipped with professional advisory services. On the other hand employers should promote eLearning and e-counselling practices during working hours.

Hungary expects to fulfil the target of each student reaching digital literacy by 2006. It is proposed to use in priority non-formal and informal learning forms to equip with information and communication technology skills young and adults who are no longer attending school.

Lithuania places the emphasis on the important role of school and municipal libraries in promoting computer literacy. Estonia recommends the establishment of a special fund to support eLearning initiatives for those groups who stand on the wrong side of the “digital divide”. Finally Slovenia proposes to develop and finance programmes to raise the motivation of people for learning and acquiring knowledge on learning – improving learning strategies, techniques and habits. Slovenia makes a specific reference to the efforts that should be made through the media to address the low motivation of older people to use the new learning technologies.

The issue of an **individual right for all citizens** to lifelong learning comes up in three reports: Hungary, Montenegro and Slovakia:

In Hungary, the recent draft Adult Education Act envisages this right for all adults. Slovakia is in favour of the legal embedding of such a right while the Maltese report states only that this question was raised during the consultation process.

Monitoring of new skill needs

Bulgaria highlights the need for a regular updating of the profiles of occupations taught in schools based on **surveys of the employers' skill needs**. Estonia also outlines the same need for a continuous analysis and forecasting of labour market needs while Slovakia suggests that this monitoring of labour market requirements should be carried out by an independent non-governmental organisation. In addition, Slovakia proposes the “**establishment of diagnostic centres** whose function will be to monitor constantly the basic skills at the corresponding performance levels.”

2. Proposals for action at European level

Bulgaria points out that a unified European framework on defining new basic skills can be elaborated using surveys and comparative analyses, common criteria, standards and indicators for evaluation.

Hungary recommends the setting up of a working group at European level to assist in the development of such a framework.

Lithuania would welcome an enrichment of its experience in the field of monitoring and meeting the new skill needs through a more active participation in projects within EU programs.

It usually suggests European financial support for the introduction of new computer-based training programs in countries with small population.

Lithuania also supports the idea of a European initiative to promote the development of social and active citizenship skills

3. Examples of good practice

Bulgaria

Special attention is given to learning of foreign languages in the study programmes for pre-school education. Foreign languages in the pre-school education can be learnt as supplementary subjects according to the interests of the children and their parents and to the syllabus approved by the Ministry of Education and Science.

The network of primary schools providing foreign language learning has been gradually expanding. The learning of two foreign languages has been incorporated into the study programmes as from the first, fifth and ninth grades of the secondary education course. In secondary vocational schools foreign language learning is directly related to the studied profession.

Cyprus

One of the main programmes in Cyprus, which promotes basic skills for adults, involves the Adult Education Centres of the Ministry of Education and Culture. Its key function is a second chance for acquiring or updating skills and knowledge for both young and adults especially for early school

learners, older workers, people with low or no qualifications, unemployed, women etc. The adult education centres operate since 1960 and offer second chance opportunities to adults in a variety of subjects in education and training. During the school year 1999-2000, 17,120 adults attended various courses in 250 centres with 470 teachers and instructors.

Czech Republic

The Economic chamber of the Czech Republic has entered a second year of the implementation of a project entitled "**Academy of Crafts and Services**", the main purpose of which is to provide for lifelong professional training of craftsmen, technicians and workers in services in various fields. The Academy guarantees the opportunity of acquiring comprehensive education for entrepreneurs and their employees in the area of crafts and services. The training concerns professional skills and knowledge, practical skills and knowledge necessary to manage a small or medium-sized business. The main objective of the Academy is to ensure qualifications comparable to those in EU countries. The courses are provided not only in the evening but also distance education. The Academy also provides for continuing training of vocational teachers, trainers and tutors, courses supporting qualifications based on development of general personal and professional skills of entrepreneurs, and lifelong learning courses in accordance with the demands of the entrepreneurship and the labour market development.

Estonia

Since 1997 the projects 'Tiger Leap' one and two have been applied in Estonia. With the help of these projects all 688 schools in Estonia are equipped with computers, all have access to Internet, 75% of them permanent. From 2001 with the support by the Ministry of Education training of teachers in computer knowledge started.

Hungary

The compulsory schooling age has been raised from 16 to 18 years. The draft Adult Education Act defines the framework for assessment of prior knowledge possessed by an adult student before the latter undertakes further training. According this draft Act, there will be an obligation of institutions providing education and training to measure and evaluate knowledge possessed by an adult student if the student requests it.

Lithuania

The Lithuanian Junior Achievement programme is an example of entrepreneurship training for secondary school students. The programme provides basic understanding of the functioning of a market economy and companies. In 2000, 186 schools were involved in the programme. During the period of 1993-2000 the number of schoolchildren benefiting from this training increased from 1,500 to 10,000.

Malta

A proposal is under preparation by the Department for Further Studies and Adult Education for the setting up of a lifelong learning centre to provide skills-based courses, guidance and counselling services, and information. The work of this centre would emphasise on-going learning needs identification and encourage dialogue between learners and educators. Courses would include literacy, numeracy, information and communication technology, language, and entrepreneurship development. The centre would act as a national and European hub for the provision of guidance and counselling for youths and adults. Moreover, the centre would provide a special focus on, including on-going follow-up of, persons at risk of social exclusion. The centre would also serve as a base for individual and group tutorials for students participating in *eLearning* initiatives to be launched by the Department of Further Studies and Adult Education.

Romania

The new National Curriculum, introduced in 1999 introduces citizenship education and technology in the core curriculum for compulsory schooling. Also in the new curriculum outdated mono-disciplinary subjects have been replaced with seven curricular areas, favourable for competence-centred and interdisciplinary approaches:

- language and communication;
- mathematics and natural sciences;
- man and society;
- arts;
- physical education and sports;
- technology;
- counselling and guidance.

Slovenia

Project Learning for Young Adults is an annual, non formal educational programme for young unemployed adults, i.e. drop-outs from primary, vocational or high school. Its main objectives are motivating young people to resume their interrupted schooling and to offer them individual support in acquiring basic skills while they compensate for their missing prior knowledge. In the programme they gain some basic stimulation and positive learning experiences within learning projects of all sorts. They can also get professional help to become more independent and autonomous in their working lives. The Project Learning for Young Adults was developed by the Insitute for Adult Education and verified by National Adult Education Expert Council. It is delivered in eight areas in Slovenia. The learning and teaching is delivered by mentors who were trained in Insitute for Adult Education. The programme is regularly evaluated by the Institute for Adult Education staff.

4. Indicators

Bulgaria

It proposes the use of the following indicators:

- total number of persons involved in education and training;
- duration of education and training;
- types and forms of education and training.

Cyprus

- Average years of schooling by level of education;
- educational attainment for persons 20 years of age and over at census years;
- enrolment in full time education by level;
- percentage of educational establishments with access to the Internet;
- third level students per 10,000 habitants;
- cumulate number of years of schooling for people older than forty;
- percentage of persons attending school by level (primary, secondary, higher);
- students in non-formal education by type of education;
- school leavers who proceed to the next stage of education by level;
- number of persons in “second chance schools” in secondary education;
- participation rates in elections (presidential, parliament, municipal);
- participation in social groups;
- percentage of graduates employed in a profession related to studies;
- participants in training systems.

Czech Republic

The report highlights the need for the Czech Republic to elaborate the following indicators:

- number of existing and new courses and programmes (including length of courses, share of courses employing modern distance methods of education and therefore accessible to a much higher number of learners, etc.);
- number of educational institutions centres providing continuing education (at universities, schools, training institutions or companies, by regions);
- number of educational institutions providing continuing education the quality of which is continuously assessed (the quality of educational products);
- number of universities involved in continuing education;

- number of graduates from courses and programmes within continuing education;
- number of individuals participating in courses, including breakdowns such as work status (unemployed, inactive, employed); reason for participation (employer initiative, employer funded, own initiative, etc.); and general details (sex, age, education, profession);
- number of “mandays” devoted to education per employee;
- proportion of employees (in %) who took part in education in the given year in the total number of employees;
- number of new training courses provided in the given year;
- number of tailor-made training programmes in connection with the introduction of new technologies.

Hungary

It suggests developing performance indicators on:

- reading comprehension in Hungarian and in foreign languages;
- mathematics;
- information technology skills;
- team-work, learning how to study.

Indicators of input, process, success and transition as regards:

- rate of participation at all levels of formal education;
- rate of participation in non-formal and informal learning;
- drop-out rate in formal and non-formal learning;
- rate of successful completion of formal and non-formal learning;
- transition between formal and non-formal learning and the labour market;
- participation of students in the process of learning (goals, methods and evaluation);
- student motivation level.

Lithuania

- Participation rates in pre-primary institutions;
- participation rates in formal education and training (elementary, basic, secondary, vocational and higher education);
- dropout rates;
- participation of adults in formal education (e.g. correspondence courses and evening courses);
- participation of adults in labour market training;
- attainment levels in education and training of the adult population according to age group.

Key message 2: more investment in human resources

1. Proposals for action at national level

Investing more in lifelong learning and human resources development

Bulgaria attaches importance to raising the level of investment in human resources from the *state budget and enterprises*. Estonia refers to the need of re-orienting the priorities of state and local government budgets towards a more substantial support of lifelong learning activities.

Czech Republic is in favour of a system of *multiple-source funding* for lifelong learning where alongside the state budget, a greater participation of companies, social partner organisations and individuals should be foreseen by innovative motivating mechanisms, tax and legal incentives.

Slovenia stresses that as regards financing responsibilities, the principle should apply that the state is responsible for the personal growth of its citizens, whilst employers and, increasingly, individuals themselves, should be responsible for acquiring the knowledge and vocational skills.

Providing incentives- removing disincentives

Most countries highlight the crucial role of the *fiscal policy* in providing financial incentives for lifelong learning.

Bulgaria and Latvia suggest that investment in human resources should be treated on an equal footing as capital investment.

Bulgaria recommends the introduction of *tax reductions* for those employers who conclude concrete agreements and promote possibilities for lifelong learning or create new positions for apprenticeship.

Czech Republic envisages that *financial incentives* for those interested in continuing education should be introduced. It proposes that costs of education, in full or in part, should be an item deductible from the tax calculation base for all. The level of corporate taxation should be decreased in favour of financing staff development. Expanding the range of deductible costs is suggested as another useful measure (tax deductible costs of education could include contributions to schools for teaching, scholarships, practical training or internships of students). In addition, Czech Republic places the emphasis on *purpose-linked subsidies or contributions from public budgets*. The subsidies may be allocated, for example, in the form of so-called vouchers which can be used, in line with specific rules, to take a study programme or training course.

Slovenia provides examples of possible monetary instruments and methods to be considered by the state with the view to enhancing investment in education, (accounting for VAT, tax relief, income tax return, introduction of vouchers for certain programmes of adult education).

Hungary will shortly introduce tax allowances to encourage individual investment in learning. In addition, employers can retain 0.5% of the contribution employers make to the Vocational Training Fund for the training of their own employees.

The introduction of *individual learning accounts* or similar approaches receives in general the positive attitude of several countries (Cyprus, Czech Republic, Slovenia). For Cyprus, the individual learning account could be a useful a means to encourage people to contribute to the cost of their education by means of special savings and deposits supplemented by scholarships granted by public or private organizations. For this country, business systems allowing workers free time or providing financial support to attend certain classes of their own choice or related to their profession could be another interesting alternative.

Slovenia confirms its interest to the introduction of individual learning accounts, to which the state, employers and individuals could allocate certain funds for education.

Slovakia sees the need for carrying out an analysis of the comparative advantages of two schemes - education Fund and individual learning accounts - with the aim to identify and draw on their complementary aspects. Such an analysis must also be in a position to provide some messages on the issue of the "decentralisation of financial flows" at a regional and local level required by the implementation of the public administration reform in this country.

The proposal of setting up a *special learning fund* addressed to specific categories of the population (those who lack the necessary resources, the elderly people, those wishing to acquire their first qualification) is put forward by Estonia and Lithuania. In this respect, Slovenia also supports the idea of earmarking a certain share of public educational funds for those with low educational attainments in order to avoid widening of the gap between well and low educated group of citizens. Cyprus affirms in a general way the necessity to promote participation in continuing education and training of older workers and those with low levels of qualification.

The idea of *levy funds* created by companies' contributions as a percentage of their payroll to support learning for their employees is positively approached in Poland and Slovenia. Czech Republic recognises this possibility but expresses a reserve on the feasibility of such an arrangement given the already very high tax burden of enterprises.

The importance of *in-service training in companies* is highlighted in several countries. Estonia and Latvia stress the need for training the enterprise leaders, the personnel managers, instructors, supervisors and mentors in developing and implementing training schemes. Poland proposes to promote and raise the significance of non-training forms of professional development (development as part of assignments, coaching, mentoring, and working within task groups). Hungary stresses the crucial need for incentives to support training of employees in *small firms* (below 50 persons).

The issue of monitoring the *efficient use of resources* comes up in many country reports. For Estonia, the use of resources for lifelong learning should be monitored to determine if issues of equity and equal opportunities are given sufficient weight. To make investments in learning activities more efficient, it is proposed that a network joining local employers, adult educators and representatives of local authorities be established. It is also recommended to use the premises of schools for adult learning in the evening, at weekends and in summer time.

Czech Republic recommends measures focused on a better management of resources and their efficient use; the effectiveness of the current government policy of subsidies in the area of education and employment should be assessed.

Slovenia equally stresses the importance of monitoring the intended use of public funds and evaluation of results. It points out the need to reinforce co-ordination and cooperation between line ministries as a means to foster the efficient use of education funds.

Czech Republic and Poland envisage the possibility of introducing a system of *financial loans* for individuals seeking to improve their qualifications.

Latvia and Poland place the emphasis on the *dissemination of good practice examples* (support to the publication of relevant material, informative campaigns in bulletins, web sites, conferences, etc).

Slovakia comes up with an interesting example of how the greater efforts of the transport sector to secure adequate lighting in the means of public transport can promote the informal learning opportunities of the commuting population who spend a significant part of their daily time in reading when travelling to work. In this country's report on may find also a reference to the need for a *pro-education media policy*: e.g. initiatives for a positive discrimination of education elements in attractive formats, through television programmes and advertising.

Developing flexible working arrangements to support lifelong learning

Bulgaria and Estonia make a general reference to measures for promoting the *motivation of workers* for lifelong learning (inclusion of clauses in the work contract allowing for regular support by the employer to raising the qualification level of the employee; connection of the worker's status in the enterprise with his/her qualification).

According to Hungary, *both time and financial resources* are necessary to promote lifelong learning. A flexible system of working time management needs to be developed into which learning and training can be incorporated.

Montenegro highlights the required *shift of the State's role* from a provider to partner and facilitator who in *co-operation with the social partners* should focus on creating the appropriate incentives encouraging flexitime, part-time work, educational leave, tax relief, employee education funds or vouchers, including those for the unemployed. Cyprus calls on social partners to develop *specific agreements on lifelong learning* setting concrete related targets.

The transposition of the international ILO Convention No. 140 on the obligations of the employer to provide employees with *paid educational leave* into Slovakia's legal system appears among the proposals in the Slovakia report.

Slovakia suggests equally the idea of allocating a part of the "social fund" (which every economic entity has to set up by law as a percentage of its payroll) for the further training of staff.

2. Proposals for action at European level

Both Cyprus and Estonia are favourable to the idea of a common research initiative undertaken by the member states and the European Union with the purpose to identify the social and economic benefits of investment in lifelong learning. They propose the association of the candidate countries in this exercise.

Czech Republic comes up with the suggestion of a *comparative analysis of various motivation measures* in other European countries including an estimation of possible costs, benefits, and legal requirements as well as a projection of the behaviour of the individual actors in lifelong learning in national conditions.

Montenegro would welcome a further *exploration of the concepts of individual learning accounts*, learning organisations, and of the learning society (one that embraces a civic culture of learning) in transnational fora.

Estonia puts forward the following suggestions:

- initiate a European level *project for comparative evaluation of the quality of training*, including member states and candidate countries;
- develop *harmonised of lifelong learning statistics* across the Union;
- open the European Social Fund to candidate states, starting with small 'starting money' and focusing on training of adult trainers.

Lithuania proposes the organisation of a *European competition* with active involvement of mass media *on the best practice of investment in human resources*. It also invites for development of internationally comparative statistics on investment levels in human resources development by the state, enterprises and households, respectively.

Montenegro recommends that the EU promote a *community-based scheme of exchangeable learning and teaching credits*. Such a scheme would have a formal name, would be recognised, supported, or sponsored by some social actors, could be administered through local councils, and would have a central channel of information such as a national web page.

Such a scheme might work in a manner somewhat similar to the following. Persons would register through local authorities as potential teachers in a specific subject, and there would be a record of their names and subjects offered on the web page and possibly on other media. Persons may also register as potential learners under the scheme. A public forum such as a web page and a respected body such as the local authority could be the platform for carrying signed testimonials from previous students or professional colleagues of the teacher testifying to the expertise of the teachers and the value of the course.

The local authority or other administering body or, failing that, the teachers themselves, organise the time and place for the lessons. For teachers and students registered under the scheme, a number of teaching credits and learning credits would be publicly assigned at the completion of each course. Depending on a number of factors, the whole scheme or parts of it could establish a rate of exchange between the credits and money. The teaching and learning credits would remain equivalent to money at an established rate of exchange. In this manner, for example, a teacher would be able to teach a skill or subject and through the credit system this person would be able to either receive money or use the earned teaching credits to purchase learning credits enabling him or her attend other courses that interest him or her as a student.

One variant or adjunct to such a scheme would be a one-to-one scheme with one teacher and one student, for cases where special tutoring or mentoring is required. One additional feature of such schemes could be the encouragement of the use of teaching and learning credits as equivalent to goods and services in a recorded bartering system.

Poland considers its *preparations for participation in the Structural Funds* as a priority issue. In this context, the report suggests:

- organisation of informative and education campaigns relative to the funds utilization;
- training of advisors (within local governments), including in foreign languages, who will support the application process and the efficient use of European funds.

Slovakia also highlights its interest in being further assisted by the European Commission, ETF and Cedefop for its preparations for European Social Fund. A key proposal in this respect is the training of facilitators who will disseminate knowledge on European Social Fund project design and implementation.

3. *Examples of good practice*

Bulgaria

A recent initiative of the Government has been the creation of a national fund “culture” targeted to facilitate cultural and educational programmes for children and youth.

Cyprus

With the creation of the Human Resource Development Authority in 1979, investment in human resources got a new dimension. Through a levy on companies’ pay roll the Human Resources Development Authority funds three different schemes.

- i) the training support schemes provide technical and financial support to enterprises and training institutions for the design, organisation and implementation of initial and continuing lifelong learning initiatives. In initial training these include in-company initial training programmes, accelerated training programmes, management and industrial training of tertiary education graduates, an apprenticeship scheme, a post-graduate programme and industrial training of students from the Higher Technological Institute, the Higher Hotel Institute and from hotel sections of secondary technical schools. In continuing training these include in-company training programmes, multi-company training programmes and training abroad;
- ii) the human resources management consultancy Services scheme aim at improving productivity and increase the competitiveness of enterprises through the development and better utilisation of their human resources. In the year 2000 the scheme was extended through the creation of a similar scheme for micro-enterprises;
- iii) the training infrastructure support scheme provides financial assistance for the upgrading of the training infrastructure of enterprises, institutions, and organisations to meet training needs in priority areas.

Czech Republic

The Learning Organisation Competition has been organised annually during last two years. The criteria applied support the development of lifelong learning. The competition is organised by the *Sebel* development agency (Prague) and its results are used to support the development of lifelong learning of employees of manufacturing as well as non-manufacturing companies, and to promote companies with top standards of staff development. The competition takes place every year. There are two categories: manufacturing and non-manufacturing companies. Each company striving to acquire the title of the learning organisation submits data for the previous year related to the following six criteria:

- a) share of expenditure on training and development of the personnel in the gross payroll;
- b) level of expenditure on education per employee;
- c) number of “mandays” devoted to education per employee;
- d) proportion of employees (in %) who took part in education in the given year in the total number of employees;

- e) number of new training courses provided in the given year;
- f) number of tailor-made training programmes in connection with the introduction of new technologies.

Hungary

Employers are provided with an incentive to support training of employees, inasmuch as approximately one third of the training contribution paid by them (1.5% of their payroll costs) to the Vocational Training Fund can be retained for training their own employees.

Malta

The Development Corporation and the Employment Training Corporation provided grants amounting to 1,092,000 Euros to 73 industries for staff training purposes.

Slovakia

Slovnaft, a.s., Bratislava, with more than 105-year refinery history represents one of the biggest industrial companies in the Slovak Republic. Slovnaft, a.s. has gone through an important technologic modernisation and transformation after politic changes in 1989 and today it is a joint-stock company employing 3,972 employees. The company follows a holistic approach towards lifelong education of its employees based on the analysis of internal and sectoral training needs as well as its global business strategy.

The system of education for employees is managed by company organizational instructions and it is implemented by the Institute of Education, an organizational unit of Slovnaft, a.s. One part of educational and training capacity is provided by own lecturers (experts working in the company) and the other part is provided by external educational institutions. The range of activities is very extensive and it covers areas like preparation of managers (from chief management up to cadre reserves) and professionally specialized preparation of employees, area of "soft" and "hard" skills and competences, language preparation and completing legal qualification requirements.

In some educational categories the principle of cofinancing is applied. It was approved in empowering liability for own career development. Typical feature of the system is freeing employees from work process to attend educational activities. Realised activities integrate needs and requirements of technical departments with departments of human resources.

4. Indicators

Bulgaria

- Expenses.

Cyprus

- Number of students per class;
- per capita expenditure on education by level.

Czech Republic

- Private and public expenditures on continuing training courses;
- expenditure of companies on training and human resources development as a percentage of the gross payroll;
- number of successfully employed during 6 months after re-training;
- level of expenditure on training and education per employee.

Hungary

- Education costs per student in formal and non-formal education, including both individual and public funding;
- expenditures per student in percentages of the GDP;
- tools for popularising learning (education credit tools).

Lithuania

- Percentage of enterprises who invest in human resources development.

Key message 3: innovation in teaching and learning

1. *Proposals for action at national level*

High-quality, user-oriented and adaptable learning systems for different groups of active learners

Many countries appear to share the importance attached to this priority.

For Cyprus the implementation of new learning methods can only be successful if it is part of a *global change of the whole school system* (aims and objectives, learning environment, assessment techniques etc.). "Schools should function as communities of learners where all members are at the same time teachers and learners. The key concepts in dealing with differences within school are flexibility and differentiation. Differentiation refers to aims, learning environment, methods, assessment, support and roles."

Czech Republic underlines that the overall approach of adult education should be based on *solving problems relevant to real-life situations*. This approach is also essential in support and remedial programmes for those who have repeatedly failed in the traditional school system, whether from lack of motivation or poorly developed skills. The Czech Republic report stresses however that a similar approach (personalised learning methods, linked with direct experience, and focusing on student interest and motivation) is the principle to be implemented in initial education as well.

The Lithuania report highlights the necessity for the *applied educational research* to explore further how the learning processes can be made more suitable for an adult person. It also sets out some of the essential *principles of an active and cooperative adult education*: students' self-realisation (by ensuring that they participate in the setting of the study aims, in choosing the study materials and methods, evaluating the results); critical reflection; capitalising on students' own experience; providing the opportunity to learn how to learn.

For Montenegro, lifelong learning entails making use of a *variety of resources* which, in certain contexts, ought to be inter-linked through appropriate information and communication technology tools (linking electronically all libraries in the country or online learning involving interactive use of web pages are two examples mentioned in this respect).

Innovative teaching and learning methods

The wider and more systematic application of a *modular credit-based training approach* is recommended in several country reports (Bulgaria, Czech Republic, Hungary, Lithuania, Slovakia). According to them, this approach can facilitate innovation of education contents; flexibility in the choice of modules; and adaptation to the different needs of various learners. It also has the potential to open up opportunities for the recognition of modules completed in various forms of formal and non-formal learning.

Czech Republic supports the idea of developing educational products for *self assisted and managed types of learning* accompanied by a system to ensure the effective quality assurance of such products.

Montenegro acknowledges that *eLearning* will undoubtedly be one of the main developments for education in this country in the forthcoming years. It warns, however, against the excessive reliance on the computer technology which risks rendering learning an isolated and individualistic activity. The element of *human interaction* between teacher and learner remains the key to a dynamic learning process in which knowledge is constantly created and recreated through co-investigation between educators and learners. *eNetworking* is proposed as an interesting possibility to be exploited for collective learning, often with a social purpose, across the globe.

Expansion of the opportunities for *certified distance learning* (especially those allowing live contact with the lecturer, like TV lectures + contact with audience via Internet) is a priority for Poland.

Slovakia suggests creating a voluntary "*Computer field service*" with state support, which will assist the development of information and communication technology in specific areas with the support of experts-facilitators.

New role for teachers and trainers

It is on this area that most of the reports focus their attention.

Cyprus calls for a major *rethinking of the way teachers and trainers are prepared* to play their radically different role (as facilitators and advisors) in the new learning process. This implies the need for significant investment to adapt, upgrade, and sustain the skills of training professionals.

In parallel Cyprus proposes the systematic *training of school leaders* who are seen to have a major contribution of teaching and learning.

Cyprus would also like to promote the idea of the *teacher "researcher-practitioner"* throughout all the pre-service and in-service programmes. This could be done by equipping teachers with the basic knowledge and skills of designing and implementing small-scale action research projects.

Estonia is of the view that the training of information and communication technology specialists and adult teachers needs to be coordinated. As a first step separate training courses should be envisaged; information and communication technology specialists need more human-based technologies and andragogical methodologies whereas adult teachers more information and communication technology based technologies and methodologies. In a second phase common training courses should be organised for both categories to reinforce their co-operation.

Hungary highlights the need for legal incentives to encourage training of professionals.

Lithuania is interested in *improving the qualification of the teachers involved in adult education*. Important steps in this direction are considered to be:

- determine the adult lecturer's skill profile and include it in the classification of occupations;
- given that industry specialists with the Master degree are most often called upon to deliver continuing professional education programs, more pedagogic and training of trainers aspects should be included in these Master programs.

For Lithuania, teachers above all should become familiar with the new learning methods (in particular those related to new basic skills training and methods creating learning motivation). To this end it is proposed that a proper dissemination of the know-how acquired through international assistance projects be organized.

It is also proposed that *teachers of vocational schools* should *work* for some time *in modern enterprises* so that they can see and understand tendencies in new technologies. Slovenia shares this

objective and states that the learning of students and educators as well, especially in vocational education, should be improved and linked to *learning within firms and enterprises* where main innovations and progress in the field usually occur.

Lithuania sees the need to create a system of *in-service training for teachers working with adults*.

Montenegro stresses the *interactive and dynamic character of the learning process* that should allow everybody involved in this process to act at the same time as both “*learner and teachers*”. Furthermore, educators need to help nurture in learners the attitude of being capable of becoming self-directed and autonomous learners, both individually and collectively.

The acquisition by those actively involved in non-formal and adult education work, of pedagogical skills appropriate for adult learners and responsibilities connected with the management of schools as community learning centres is an important priority for Malta.

The report of Montenegro emphasises also that the personnel engaged in the various diversified setting of lifelong learning – which may include the home, schools, training centres, universities, museums, the church and its network, the workplace, public libraries, the media, youth centres, band clubs, political party clubs, hospitals, old people’s homes and others - can be conceived of as *educators in the broadest sense*. The philosophy of lifelong education should therefore be a feature not only of initial and in-service teacher preparation but also of preparatory and in-service (continuing professional development) courses for those engaged in lifelong learning activities as journalists, university lecturers, librarians, museumologists, social workers, priests, trade unionists, youth leaders, gerontology specialists, managers, etc.

Finally the Maltese report contains a proposal for a more broad-based university education at undergraduate level allowing for more flexible combinations of areas (e.g. a BA in Theology and Computer Studies) and greater options for specialisation at postgraduate level.

Poland suggests to set up a system for the *certification of training courses addressed to adult educators and trainers* and support the availability and accessibility (including in financial terms) of this kind of training courses for various recipients.

Poland would also like to increase the opportunities for *training in the use of information technologies*. This requires *staff development actions* to the benefit of those who will be in charge of preparing *high quality learning materials* based on information technologies or of organizing this form of learning.

Slovakia suggests the setting of quality standards and accreditation arrangements for teachers, tutors and programmes in adult education.

Slovenia stresses that the future learning of educators should focus on investigating and *understanding better the learner and his/her needs as well as the learning context itself*.

2. *Proposals for action at European level*

Bulgaria supports the working out of *European standards for adult education and training programmes*. Similar proposals in this direction emerge from the Lithuania, Poland, Slovakia reports as well.

Czech Republic proposes that the *support for continuing education of staff of institutions providing adult education* (teachers as well as managers) and counsellors should become one of the priorities of European educational, placement and exchange programmes (e.g. Leonardo da Vinci, Socrates).

A similar proposal is formulated by Estonia, which believes that *training of adult trainers should have priority at both European and national levels*, and be financed from Structural Funds.

In addition Estonia puts forward the following suggestions:

- elaborate a common *eLearning* methodology at European level;
- identify general qualification criteria at European level for adult educators, also specific criteria for people teaching special target groups like – disabled people, prisoners, socially excluded people etc.;
- initiate a comparative study on mostly used teaching-learning methodologies and technologies;
- undertake a research to identify the common features and differences in lifelong learning strategies in EU member states and candidate countries.

Hungary proposes the establishment of a *European monitoring system for collection, evaluation and dissemination of information and communication technology-based pedagogies*.

Lithuania recommends to develop further international exchange programmes for teachers and lecturers as well as initiate a European level program on the development of *quality assurance in the sector of non-formal education*.

Poland suggests:

- a more systematic international co-operation between non-governmental organisations involved in mentors' development (that would include Polish Psychologist Society, Society of Non Government Organizations Trainers, Society of Educators);
- *a European standardisation of key requirements for people teaching the adults* – e.g. European Mentor Certificate;
- international exchange of good and positively tested learning materials based on information technologies in various areas.

Slovakia proposes to initiate a discussion at EU level aimed at:

- setting non-compulsory *minimum standards for the European extra-curricular environment*;
- setting European benchmarks for schools' facilities;
- setting European benchmarks for the status of educators;
- identifying the key issues related to the creation to the European education environment.

3. Examples of good practice

Bulgaria

Forty companies for training and learning have been established, which combine delivery of basic skills and new professional and social competencies. They are furnished with modern equipment and are coordinated by the Centre for Methodological Coordination.

Hungary

An **Internet Open University** provide open studies over the World Wide Web by the Hungarian Academy of Sciences, accessible both from Hungary and abroad. It is aimed at disseminating high-level knowledge in philosophy without restrictions as to qualifications, with the intention also of being a model for education in the future. Quality is warranted by the Institute of Philosophy of the Hungarian Academy of Sciences. The Academy's Philosophy Open University offers not only information, but also consultation and examination opportunities. Its long-term objective is to integrate into the university Ph.D. programme. Present specialisations are history of philosophy, philosophy of society, science, religion and communication. The only requirement for admission is registration which is necessary for the students to receive a password for downloading protected materials, to be eligible for consultation over e-mail and in person, as well as to take exams. The Open University relies greatly on the preparatory work of the UNIWORLD Non-Profit Association (www.uniworld.hu) concerning virtual and open universities.

Slovenia

Centres for self-directed learning have been developed by Insititute for Adult Education with the aim of developing self study systems (including distance education), self study material (from written to multimedia), and, following the basic principle of development projects, counselling and training in the field. Information and promotion of the new possibilities of learning was spread among 600 institutions (primary and secondary schools, universities, folk high schools, private educational settings for adults, small enterprises, big companies, public libraries, societies, institutions for people with special needs, correctional institutions and others). Informative seminars, informative booklet, several expert meetings as well as public events (e.g. Educational Fair, Science Festival) attracted nearly 70 institutions. Seminars led by British experts on organising and managing the autonomous learning schemes were organised at the Insititute for Adult Education where the participants prepared a written assignment in which they developed a model suitable for their institutions. In 1999 already 39 centres were operating (most of them in AE organisations, some in enterprises and some in schools), 11 are expected to be opened in the near future.

The Learning Exchange developed by the Insititute for Adult Education is an information system which links together individuals that are willing to share their knowledge with others and those who seek such knowledge. Information on learning supply and demand is managed by computer data processing using the Internet as a communication tool and regularly published (free of charge) in mass media. More than 20 different public media outlets - newspapers, magazines, various radios and TV stations, teletext and more recently Internet are informing people about the current supply and demand. The support of mass media was crucial for operating the Learning Exchanges.

A Central Learning Exchange had experimentally operated in the Institute for Adult Education and has then been moved to the Worker's Library in Ljubljana and three local learning exchanges afterwards. The central learning exchange is responsible for the co-ordination of data processing and promotion. All learning exchanges have about 6.700 users who offer or seek knowledge. A variety of knowledge (more than 10.000) is offered: language skills, mathematical knowledge, personal growth, music, computing, physics, handicrafts, art, travelling, economics.

4. Indicators

Bulgaria

- Outcomes of education and training;
- equipment and pedagogical personnel.

Cyprus

- Percentage of students with access to computer;
- number of students per computer in institutions by level;
- number of students per teacher;
- frequency of in-service seminars;
- number of teachers per inspector.

Czech Republic

The need for elaboration of the following qualitative indicators is outlined:

- standardisation of quality evaluation of continuing education;
- evaluation of results of continuing education carried out by course-leavers themselves (evaluation of effectiveness of lifelong learning);
- evaluation of result of training in the work place by a tutor a manager or a human resources manager.

Hungary

- Education and training of teachers and instructors;
- education infrastructure;
- learning methods (including the role of information and communication technology).

Lithuania

- Participation rates in pre-primary institutions;
- participation rates in formal education and training (elementary, basic, secondary, vocational and higher education);
- dropout rates;
- participation of adults in formal education (e.g. correspondence courses and evening courses);
- participation of adults in labour market training;
- attainment levels in education and training of the adult population according to age group.

Key message 4: valuing learning

1. *Proposals for action at national level*

Bulgaria links the developments in this area with the introduction of a modular credit-based training system.

Estonia places emphasis on the direct communication between 'customers', i.e. employers, providers, adult education institutions. It highlights that the question of *building mutual trust* is important and requires to *associate all sides* (social partners, enterprises, professional associations, etc) to the process of development of occupational skill profiles and standards.

The building of a new evaluation and assessment system is a national priority in Hungary. In the period from 2002 to 2006, a comprehensive examination system for evaluation shall be implemented. This system connects to the framework curricula, with strong ties to the Comenius 2000 programme aimed at improving the quality of public education. The new system will be able to assess efforts present in the educational work of institutions for disadvantaged students which operate under harsh conditions, and to assist those pupils.

Latvia proposes the development of *parallel learning paths able to give access to the same qualifications*, which can be obtained in full time studies. This needs to be combined with modularisation of the educational programmes. It should also include the possibility for more flexible recognition of skills and knowledge acquired by the individual through the different learning paths (e.g. by putting together all the educational certificates previously obtained in different ways by the applicant and carrying out a portfolio assessment accompanied by a practical or examination).

Latvia attaches particular importance to the co-ordination of the in-company training organised by the employers with the corresponding educational institutions, which would facilitate the recognition of the knowledge obtained at work, as part of the formal education programme.

Latvia wishes to draw on the experience obtained in various EU countries, experimenting with accreditation of prior and experiential learning.

Malta acknowledges the need for innovative and appropriate assessment practices to credit other kinds of learning than those covered by formal tests, examinations and other assignments. It highlights the *close links between the introduction of dynamic and innovative styles of teaching and learning and the changes in the culture of assessment* by stating that methods of assessment tend to condition the pedagogy or style of teaching and learning. Malta sees the need for further elaboration of the concepts of both of non-formal and informal learning if they are to be made more amenable to instruments of evaluation. It asks for a stronger emphasis on learning for other than vocational purposes and for keeping the balance between the personal and social and the industrial and vocational aspects of lifelong learning.

Poland highlights the need to set up the *legal basis for recognition* of qualifications based not only on formal documents but also on experience, achievements, recommendations of appropriate people and institutions.

Hungary emphasises the need for a comprehensive evaluation and assessment system for public education, including the education work of institutions for disadvantaged students.

Czech Republic recommends to set up an appropriate legal framework for accreditation and certification of skills and competencies acquired outside the formal education system, in particular through work experience.

Slovakia stresses the need to guarantee the *independence of institutions responsible for the recognition of the outcomes of education* or the accreditation of education programmes. These institutions should be built on the basis of *participation of all key stakeholders*.

Slovakia considers necessary to undertake an analysis of the suitability and adapted introduction of the accreditation of prior and experiential learning system into its national context. It is foreseen that the use of the accreditation of prior and experiential learning system in the area of qualifications of teachers of foreign languages would be very beneficial. Finally Slovakia attaches importance to a wider dissemination among teachers of information about the European initiatives or systems (European Credit Transfer System, ECTS, EUROPASS, European Computer Driving Licence).

The Slovenia report provides an indication of numerous project initiatives underway in this country as well as of proposals to create a consistent system for valuing learning.

1. A plan will be drafted to integrate the knowledge acquired in non-formal settings with the knowledge acquired in formal settings by reorganising the educational system into a modular and credit system.
2. The entire programme delivered by the Faculty of Arts for teachers in adult education without pedagogic and andragogic knowledge and skills should be designed accreditation of prior and experiential learning system of recognition of non-formally acquired knowledge and skills, and organised in modules (and as a credit system). The accreditation of prior and experiential learning system should also be applied to the job promotion for teachers.
3. Action should be taken to raise the awareness of the employers with regard to acceptance and recognition of non-formally acquired knowledge and skills.
4. A network of counselling centres should be set up to prepare portfolios outlining prior learning experiences and the counsellors who will manage the accreditation of prior and experiential learning procedure and the creation of a personal portfolio should be appropriately trained.

2. *Proposals for action at European level*

Cyprus proposes to encourage the following initiatives:

- a comparative study between different countries as regards the conditions for mutual acceptance of qualifications;
- use of the European Education Portfolio as a model for creating a *European Adult Portfolio*;
- use of information and communication technology and European fora for extensive *dissemination of 'success cases'* on valuing learning. These cases may be used as background information for the future development of a commonly accepted approach.

Czech Republic recommends facilitating candidate countries' participation in the EU system for recognition of practical vocational training (EUROPASS).

Estonia suggests carrying out a *cross-country analysis of existing practices in Europe* as well as considering the establishment of a European system of qualifications.

Hungary puts forward the idea of *European guidelines as regards the professional and examination requirements in all common professions and occupations*. These guidelines could then be used as a basis of comparing “outputs”, analysing and unifying the content of diplomas.

For Malta a pan-European *tool and framework for the evaluation of skills, knowledge and competencies that are learnt non-formally and informally* needs to be developed. Malta invites the European Commission to envisage a conference on the subject. The conference would come out with a framework for common action and a proposal for the setting up of a network to facilitate information and the sharing of valued practices and experiences.

Malta equally stresses the need for a more successful *dissemination of research in the area of evaluation of instruments used for assessment and recognition*; ideally with some coordinating trans-national agency which would put its research findings and expertise at the service of Member States and possibly carry out audits, where requested, to ensure comparability of standards.

According to Malta, the European Forum's work on transparency of qualifications is positive especially at the level of permitting an exchange of information on good practices for assessing and recognising competencies. It could nevertheless be improved with a well-run and efficient networking system.

Lithuania suggests to initiate European level program on the development of *quality assurance in the sector of non-formal education*. In addition, it considers useful to develop a European network of national institutions responsible for licensing education providers and their programs.

Poland focuses its proposals on:

- organising an experience exchange forum on existing systems;
- cyclically organised conferences through websites;
- setting up an *International Committee for developing lists of indicators on competence-based standards*; the granting of certificates in each country, following a test of knowledge and skills of the applicants will be based on the standards developed on international level.

Slovakia recommends that a *European initiative analogous to the Bologna process* of creating a common European space of university education, be considered for the support of a similar process at other levels of European vocational training and education.

Slovakia equally supports the ideas of:

- a *European Code of good practice as regards the recognition of outcomes of non-formal and informal learning*;
- reinforced international co-operation in the creation of non-formal education modules and their harmonisation with the European Credit Transfer System and the award of credits for skills acquired through practical activities;
- the *extension of the diploma supplement approach to all types of diploma, report and certificates*;
- encouraging international specialised vocational organisations to activate international networks of organisations associating people in a relevant occupation and harmonise international standards for the relevant qualification and occupation.

3. Examples of good practice

Czech Republic

Some branch or professional associations have a comprehensive certification framework for certain branch occupations recognised by employers and the relevant industry. Such frameworks are sometimes bound by the requirements to satisfy professional standards set out in examinations which are obligatory for certain professions (e.g. energy sector, welder works, health sectors).

Lithuania

Article 11 of the Law on Non-formal Adult Education determines rights of participants of non-formal adult education. After adults pass corresponding examinations in institutions of formal education and studies, the knowledge that they had acquired in the system of non-formal education, can be evaluated and recognised. They can also get a certain certificate or a document confirming that they had completed part of a separate regulated program.

Slovakia

The NARIC centre has worked out its own system of levels of knowledge for a “de facto” judgement of language competencies. It is easily understandable and readable also for a layman (e.g. craftsmen doing technical activities). This scale of knowledge is identified according to the following levels:

- level under the level of school leaving examination from given language;
- level of school leaving examination from given language;
- level between the levels of school leaving examination and the state language examination from given language;
- level of the state language examination from given language.

The system is in particular addressed to employers and employees who do not need “de iure” recognition at all but only they just needed information on approximate harmony between offer and demand. In this connection they appreciated very much especially recognition “de facto” done by NARIC. On the basis of this aspect they got a certain idea of the level of language competences of applicants for occupation and of the fact to what extent they can trust in them e.g. on behalf of their company during international negotiation or what activities they can delegate on them.

Slovenia

Limited introduction of the accreditation of prior and experiential learning procedure in vocational qualification within the Phare MOCCA Programme project was concluded in December last year. Within the project, the Institute for Adult Education prepared a training programme for counsellors and evaluators in accreditation of prior and experiential learning procedures. Approximately 60 candidates acquired the necessary skills (vocational qualifications for home healthcare nurse, processing of milk, fruit, meat and cereals).

The first evaluation and recognition of non-formally acquired knowledge and skills for home healthcare nurses has been carried out on a trial basis. Approximately 10 candidates have been granted the certificate. The programmes of training and the execution of the accreditation of prior and experiential learning procedure have been evaluated and improvements to these programmes and the accreditation of prior and experiential learning procedure are under way.

4. Indicators

Cyprus

Existence of accreditation-recognition systems.

Key message 5: rethinking guidance and counselling

1. *Proposals for action at national level*

Providing easy access to information and qualified guidance locally as well as user-friendly tools for self-guidance

Bulgaria envisages as a priority measure at national level to establish an *integrated network of libraries*. The network, composed of 11 regional, 16 municipal and 40 community libraries (the latter functioning as well as cultural centres called “chitalishte”), will represent a significant potential for providing sources of information, materials for education as well as possibilities for career guidance. Therefore, the acquiring of skills for individual learning in the library could become an element of the educational process aimed at providing additional opportunities for self-education and training. The network of the libraries is expected to guarantee also more effective access to information for the people with special educational needs. In addition, Bulgaria foresees the setting up of a national network comprising 28 centres for information and career guidance with a view to improving the services for the secondary education system; the creation of a *national data-base on education and lifelong learning*; the *networking of agencies* (state, municipal and private) that provide career guidance services and counselling; and the incorporation of a module for career guidance and counselling in each form of education.

Cyprus proposes the creation of a computer *data bank* (web page) which will function as a continuously accessible source for all. It will provide *educational, vocational and personal guidance*. It may also be enriched and updated with all the necessary information according to users needs. The storage of information should be interconnected with the other European databases.

It is recommended as well that the official state services (i.e. the Counselling and Career Education Services, Ministry of Education and Culture) should have the leading role in the *quality assurance of G and C services* provided in a mixed public and private market in accordance with the existing European framework (e.g. codes, ethics, legislation, guidelines, etc.).

Similarly to Bulgaria and Cyprus, Estonia puts forward the proposal of a *national database comprising information on all different types of adult education and lifelong learning providers*, including universities. The database will enable the exchange of related information with the other countries, also access to global information. Estonia equally suggest developing an *adult education Internet portal* making access available to national and international (European) counselling services. The creation of a *network of national and local counselling centres* is also a priority for Estonia.

For Hungary the development of a career orientation system seen as a coherent process from admittance to school to retirement is presented as a national priority. The key aspect in such a system will be the *co-ordination of the distinct career selection and career orientation activities taking place in-school and on the labour market*.

Latvia attaches priority to the development of a *national strategy of vocational guidance*, which will include as essential components the development of educational programmes for guidance specialists and consultants, the establishment of a focal point which will centralise and deliver information on the possible guidance and counselling options in the country as well as development of services closer to the users in cooperation with the local authorities.

Lithuania would like to promote the *private guidance and counselling services* as well as *the use of the media* in disseminating information on learning opportunities.

Montenegro places the emphasis on the following priority areas:

- introduction of *on-line career guidance accessible from schools and homes* through which students may search job and training as well as mentoring provision in fields of interest;
- better co-ordination in the provision of brokerage services which should be available at school level as well as *special approaches that would effectively target disadvantaged groups at the local level*;
- development of a new type of *career brokers appropriately trained* (in particular in information and communication technology) and following practice guidelines as well as a code of practice to be worked out;
- streamlining of the use of existing resources and provision preferably through the setting up of a national body. In this context, plans to establish a national resource centre for guidance and counselling need to be stepped up.

The Maltese report outlines also the need to encourage and support *the youth organisations* to start and effectively manage (a) training opportunities brokerage services, and (b) mentoring schemes.

Romania highlights as key action points the accessibility of guidance and counselling services for adults and members of the local community as well as the need for these services to *extend beyond the strictly vocational and educational dimension and to include also social and citizenship aspects*.

Slovakia stresses the need to build a guidance and counselling system as a continuous service for all based on quality standards and arrangements for accreditation of institutions providing this service. Slovakia (likewise Bulgaria, Cyprus, Estonia, Montenegro) considers necessary to *make available and connect electronically existing information databases* both for career advisors (irrespective of their institutional background) and for the clients, citizens, themselves. The Slovakia National Employment Plan envisages the introduction of the *"career planning and business development" subject in the learning paths of primary and secondary schools*.

Slovenia places emphasis on the aspects of strengthening cooperation and networking between schools, development of local centres for adult education information and counselling, establishment of a partnership network for all institutions at the local level dealing with counselling, career-orientation and education. Slovenia underlines the importance of delivering the counselling services at the existing locations where people gather, such as the library bookmobile, information points at village schools, shopping centres and at other local events.

Supporting the development of training for guidance and counselling practitioners and quality guidelines for guidance and counselling services

Bulgaria announces its intention to develop new programmes for qualification and training of staff working in the system of career guidance.

Cyprus acknowledges the need for *intensifying the provision of training to counsellors* in order to develop their skills and to improve their ability to manage, analyse and handle information for satisfying user's expectations. Counsellors need also to be better and more regularly informed on existing resources and actions taken in other European countries in the area of counselling and guidance services.

Czech Republic places the focus on the training of counsellors and their continuing professional development, including quality training in foreign languages, internships abroad and training of trainers – i.e. those who train prospective counsellors particularly at teacher training faculties. In addition to their current qualification, counsellors will therefore have to acquire skills and competencies in the area of management and information analysis.

According to Estonia, the roles of mentor, supervisor, counsellor, and consultant should be clarified and proper training for them initiated. The co-operation between providers, mediators, and clients – individual and collective learners – should be reinforced.

Latvia and Lithuania see the need to develop training programmes programs for counsellors.

Lithuania and Slovakia refer to the required *development of standards and accreditation arrangements for guidance and counselling centres*. Poland shares a similar view referring to the development of a certification system in the area of guidance and counselling.

Montenegro stresses that the content of initial and in-service courses for persons involved in guidance and counselling services should be reviewed and improved. Such training needs to ensure the acquisition of high level information and communication technology skills.

Poland draws attention to the providing training courses for advisors, in the following areas:

- ability to use Internet databases in various languages;
- ability to obtain and select information;
- inter-personal skills;
- ability to influence growth of pro-active attitudes on the labor market.

Slovakia attaches priority to the reform of the training of educational counsellors at schools as well as the creation of new models for the training of vocational and career advisors taking into account the key skills needed for the performance of the profession in work with different groups of clients.

Slovenia proposes that the existing *university programmes in the country need to be supplemented with contents and modules on the guidance and counselling activities*.

As many other countries it affirms that special attention should be given to the adequate training of guidance and counselling staff and that quality standards for guidance and counselling should be developed and monitored.

2. Proposals for action at European level

Cyprus suggests the organisation of European conferences and seminars for guidance and counselling practitioners as a means for their further training, professional growth and development.

Estonia and Lithuania propose the development of a *European database centre on learning and employment possibilities* having links to different countries' databases, labour market, also counselling institutions around Europe.

Hungary states that education and training of guidance and counselling professionals should continue to be one of the priorities for support under the European programmes (Socrates, Leonardo, Youth).

Lithuania suggests the setting up of a European labour centre with EU support for maintaining the central office, developing the informational network, preparing and adapting the consultation programs. The countries members of the network would have to ensure maintenance of national centres and training of local counsellors. It would be necessary to determine possibilities and conditions for private consultant companies to participate in the network.

Poland sees a role of the EU in *setting the framework rules for the development of databases on learning and employment opportunities* i.e. by defining the type and scope of information that should be contained and the methods of obtaining the information. It also suggests more possibilities for international exchange of experience among G and C professionals.

Slovakia proposes the establishment of a *European education portal* equipped with a structured organisation of thematically classified information on educational materials, including up-to-date information on media education programmes, and other current high quality utilisable media products. This could be complemented by:

- the creation of an open network of specialists, which would organise the transfer of experience and secure information on didactically interesting sites, their adaptation and concrete use;
- the support for the creation of national education portals at least partially mirroring the European education portal and performing the same activity in the local environment.

3. Examples of good practice

Czech Republic

The Ministry of Labour, Family and Social Affairs founded a **network of diagnostic centres** which operate as a part of central system but employs modern methods in counselling and guidance to provide support to differently disadvantaged groups on the labour market. These diagnostic services combine professional orientation, training and support in employment with psychological testing and counselling, motivating mechanisms and highly individualised approach, including the design of individual career plans.

The **Integrated System of Typical Jobs** (<http://www.istp.cz>) is an information system which combines description of job contents and requirements in terms of types and levels of education and training, personal skills and capacities, job vacancies, etc. The system elaboration has demanded an active involvement of social partners. The system makes the information on the job content more transparent and enables potential candidates to verify their personal predisposition and qualifications towards the job. The system can include in the future new modules which will provide links to other information systems, such as information on education and training possibilities, job prospects on the labour market and labour costs and others. The system can be widely used in career guidance, in preparation of personal career and development plans, in elaboration of a comprehensive system of qualifications for all levels and types of education, including informal training.

Latvia

In the Professional Career Centre which was founded in 1996 under the Ministry of Welfare and which offers consultations regarding choosing education and profession and obtaining information

about educational institutions and programs, a database has been set up about the educational possibilities for all interested people beginning already with the graduates of the primary school. A database about study courses has also been set up, which is mainly about Riga, but include also a range of other towns in Latvia where there is offer. This database is oriented at people who are in the labour market. A database has also been set up about the study possibilities at Master's programs. A data search program has also been developed. A consultation office has been opened meant for those who are studying, as well as for those who are working and also the unemployed. As the professional career centre is an institution functioning under the authority of the Ministry of Welfare, its clients are all the inhabitants of Latvia.

Malta

The Division of Education has developed an effective guidance and counselling service up to and including the point of transition to the workplace or to tertiary education. A network of guidance teachers in every school is co-ordinated by a team of professionally trained counsellors, an education officer and an assistant director. Together they facilitate a key student service with several examples of good practice which include:

1. valid work on developmental guidance in partnership with other providers adopting a whole-school approach targeting identified learner needs;
2. education-business links;
3. well equipped and updated career rooms at the school level and an eventful annual careers convention at the national level;
4. pioneering work with parents including an on-going parenting skills programme provided at both national and community levels;
5. a supportive and comprehensive schoolgirl mothers' unit facility;
6. various substance abuse prevention programmes with other agencies and non-governmental organisations.

Slovakia

The Open Society Foundation in Bratislava published large publication "World Of Work" in 1998. Tenth of experts from different areas contributed to its creation either by authorship or lecturing. The publication consists of 15 different sectors in separate booklets together with tenths of occupations from different areas. Introducing booklet of this publication includes collection of basic information for everyone who wants to find employment in the labour market (world of work, work and you, preparation for work, you are seeking a job, work and law). This large-scaled and singular publication was distributed at all primary and secondary schools, at pedagogical-psychological counselling centres, labour departments and their IPS, centres for guidance-psychologic services, information centres for youth, regional libraries and elsewhere.

Hungary

It has introduced counselling and guidance for both the unemployed and the employed in every labour centre.

Slovenia

At the Institute of Adult Education the programme '**Training for guidance and counselling in adult and vocational education**' is currently being developed. The programme includes several modules for offering information and guidance in the field of vocational qualifications; building up a portfolio for accreditation of prior and experiential learning procedure; for specific more complex forms of counselling like support in learning difficulties, developing learning skills in adults, motivation for learning and further career building; fighting a difficult family situation or solving non complex personal issues.

4. Indicators

Cyprus

- Number of students per guide.

Key message 6: bringing learning closer to home

1. *Proposals for action at national level*

Developing multi-purpose local learning centres

Bulgaria envisages to *exploit the long existing community cultural centres* called “chitalishte” as a basis for the development of multi-purpose local learning centres (see further details in chapter on examples).

In Cyprus, the state authorities in co-operation with local authorities and non-governmental organisation are considering to:

- establish local centres, where citizens can have easy access to information and communication technology and get advice and guidance especially in large villages;
- *reorganise municipal libraries* into centres of provision of access and communication with universities.

In Estonia this key message has been awarded the highest ranking priority among the Memorandum messages. The Estonian report suggests to *re-open empty schools and convert them into local learning centres*, equipping them with information and communication technology infrastructure, Internet connections, etc.. It also recommends to create *an association of lifelong learning institutions at local level* in order to enable an integrated planning, financing and monitoring of activities put in place in this field.

Latvia stresses the need for an *integrated approach of education delivery at local level* by promoting the *networking and co-ordination of the existing services* at this level. This will facilitate the efficient and rational use of the available (and limited) resources at the local level.

Lithuania highlights the importance of adapting and broadening the scope of activities of institutions such as *museums, libraries and culture centres* for the purposes of lifelong learning. This requires an adequate *pedagogical and andragogical training of their staff*.

Montenegro focuses on its plan to transform *schools into community learning centres* catering also for the education of adults. The consultation process in the country underlined that the implementation of such an objective should be regarded as an integral element of a comprehensive paradigm shift affecting all the areas addressed by the other five key messages (e.g. active involvement and motivation of learners, collaborative resource mobilisation, databases on learning opportunities, upgrading role of school councils, valuing informal learning, etc.).

The Slovakia report provides a general affirmation, without any further reference, as regards the need to a) enact legislation supporting the *comprehensive use of schools and other educational or cultural centres as local learning sites*; b) *encourage wide partnerships* at local and regional level.

Use of information and communication technology as a means of bringing learning closer to home

Bulgaria attaches importance to the process of updating the equipment of the educational units with information and communication technology; the total number of personal computers in the school network is expected to be around 35 000 by 2005. Bulgaria acknowledges also the need to create the legislative basis for the development of new distance learning methods.

Cyprus has launched a large-scale plan to introduce computer technology at all levels of education and also considers the possibility of granting a personal computer to every student at all levels for home use. It has also recently taken the decision to establish an open university.

Czech Republic proposes to expand the *distance education and eLearning possibilities to support individualised and self-steered learning processes*, in particular for those individuals who want to combine employment with further personal development. In this context, the development of *adequate learning tools*, transformation of public locations (schools, libraries, etc.) into learning centres for all, and affordable Internet costs are seen as necessary support measures.

Lithuania places the focus on the further development of distance learning through the continued expansion of the network of distance learning classes, the diversification of courses offered and the *upgrading of teachers' capacities in distance learning methods*.

Slovenia attaches priority to the development of *materials for self-directed and guided learning*.

Making lifelong learning a reality at local level through open and inclusive partnerships

Bulgaria proposes to draw on the existing partnership-based institutions at regional level (regional employment councils, commissions on economic and social cohesion) in order to develop regional programmes for lifelong learning.

Latvia recommends developing and effectively using *co-operation platforms bringing together all related actors* at regional and district levels.

Slovenia places emphasis on the setting up of *local information networks*, with participation of social partners and economic entities and with access to appropriate use of information technology, to *improve communication between education and working environment*.

2. Examples of good practice

Estonia

In 2001 five private companies initiated a project "*Look the World*", paying during five years 250 millions EEK for establishing around the country Internet points. The idea is to give all people, especially those who are socially excluded, possibility to use Internet. This is the first co-operation project between private, public and the third sector, where all partners share the common aim to accelerate the development of info society in Estonia. The project pays big attention to teaching people (especially people over 50) in digital literacy.

Latvia

In the Pedagogical academy of Liepaja, an adult education centre, has been established. It offers courses and programs for a wide range of participants, while consultation places have been established in Saldus, Kuldīga and Riga. That way, it is possible to obtain the higher education without having to go to Liepaja.

This centre offers also education of different kinds in collaboration with enterprises. The studies for the employers of the enterprise are organised in the premises of the enterprise, which is convenient and economical.

The centre has a fruitful collaboration established with the regional computer centre. It is fully equipped and used for the studies of various target groups.

The adult education centre also organises various summer camps, which is a popular and effective form of learning for adults.

Romania

In the mid '90s, the Ministry of Education launched the ROEDUNET Programme. This links every educational institution in Romania to the Internet. This programme, along with other facilities developed locally or based on European projects, provides a platform for implementing the eLearning initiative of the European Commission.

Slovenia

Slovenia launched "self-directed learning" with the help of prepared materials and organised mentorship in a growing number of dedicated centres. Much effort goes into developing ways and means of easing the acquisition of knowledge. There are 35 general learning centres each with a professional advisor, where people can learn whatever they like, free of charge. Two ministries, Ministry of Education, Science and Sports and Ministry of Labour, Family and Social Affairs, finance this initiative. Evaluated by Insititute for Adult Education, it is extending successfully into companies.

There are more than 160 Study circles (inspired by Scandinavian practice) already established in Slovenia, covering a wide diversity of topics and issues. They are settled not only in institutions dealing with education, but also in museums, libraries, centres for social work etc.

Tele-house in Prekmurje: Lifelong learning from the viewpoint of people in the local community. The first Tele-house in Slovenia was established on 5 May 2000 and is a house equipped with telecommunications equipment providing for the communication of residents at several levels: within the local community, among local communities and with the external world. More important than the house as an institution is the social life of local residents of all ages, study circle activities and individual work with family members. The house provides varied stimulation for: learning, writing projects, preparation of the TV programme and the local newspaper. It also offers premises for societies, and a small accounting office. The house acts as the driver for the stimulation to learning of the local residents who stop there on their way to sell wine, inquire about prices, drought or sale opportunities (between 6,000 and 7,000 people).

3. Indicators

Cyprus

- Number of institutions in various areas of the country.