



EUROPEAN COMMISSION  
Directorate-General for Education and Culture



# Summary Report on the Peer Learning Activity on Adult Learning Monitoring

Bratislava, 22 – 25 March 2009



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# 1 INTRODUCTION

A Peer Learning Activity (PLA) took place on 22 – 25 March 2009, in Bratislava, the Slovak Republic, on the topic of Adult Learning Monitoring. The PLA was organised within the framework of the implementation of the Action Plan on adult learning: *It is always a good time to learn* (2007).

The Academia Istropolitana Bratislava hosted the meeting and the PLA was organised by the European Commission and the Academia Istropolitana. In addition to the host country, eleven countries participated in the PLA: Austria (AT), Bulgaria (BG), Cyprus (CY), Czech Republic (CZ), France (FR), Liechtenstein (LI), Norway (NO), Portugal (PT), Sweden (SE), The Netherlands (NL) and the United Kingdom/England (UK/England). European Commission staff also participated. Ten of these eleven countries were represented by a governmental representative, eight of them had an additional representative from a publicly-funded agency and a ninth had an additional representative from the private sector. All participants have influence within their respective work contexts and, thus, are in a position to disseminate the outcomes of the PLA.

Prior to the PLA participating countries were asked to provide a brief national report addressing the following issues:

- monitoring adult learning in relation to the following benchmarks:
  - o participation in lifelong learning (25 – 64 years of age)
  - o early school leavers
  - o low achievers in reading
- the policy measures taken to achieve these three benchmarks and to improve the quality of adult learning staff and of investment:
  - o the methods of measurement and the agencies which carry it out
  - o management information systems for providers and their function
  - o measurement of the quality of staff and providers.

In addition, respondents were asked to identify gaps in monitoring adult learning in their country and the requirements for a better monitoring of the sector. They were also asked to indicate lessons learned in their countries in relation to adult learning monitoring that could have application in other European countries.

## 1.1 Purpose of the report

The aim of this summary report is to present the key issues raised and the discussions that took place during the PLA in order to support wider national and European discussions on adult learning monitoring. It is intended that the report will be used to support the work of the European Commission and the Action Plan Working Group in the implementation of the Action Plan *It is always a good time to learn*. It is also intended that the report will inform the 'Study on adult learning terminology and adult learning monitoring' launched by the European Commission in late 2008. In fact, one of the UK/England representatives working in the lead agency in the consortium carrying out the study participated in the PLA and made a presentation on it to the PLA. Thus the actual work of the PLA and this report are of particular significance in the context of that study which has just begun.

## 1.2 Structure of the report

The report comprises four sections.

**Section 1** (Key issues in Adult Learning Monitoring) draws on the Background Report prepared for the PLA and other sources to provide an outline of the relevant issues in relation to adult learning monitoring.

**Section 2** (The Structure of the Peer Learning Activity) describes the structure, methodology and content of the PLA programme.

**Section 3** (Key Issues Addressed in the Peer Learning Activity) outlines the key issues addressed by the presentations, the group activities and the ensuing discussions.

**Section 4** (Overall Conclusions and Recommendations) presents the conclusions arrived at during the PLA and the recommendations arising for the European Commission within the context of the Action Plan.

## 2 KEY ISSUES IN ADULT LEARNING MONITORING

As new priorities for adult education policy in the context of lifelong learning emerge, it is essential that on-going monitoring becomes a permanent feature at all levels, local, regional, national and European, so as to produce better empirical evidence about adult learning, adult qualifications and adult progression as a result of participation in learning. Policy makers, adult education and training providers and potential learners variously require information on, for example:

- the availability, type and location of adult learning programmes/courses
- the profile of adult learners (e.g. gender, age, socio-economic status, educational level, qualification level)
- the performance of adult learners (e.g. completion rates, learning outcomes) and providers (e.g. quality, relevance of programmes/courses)
- the reasons for non-participation in adult learning.

Adulthood covers three-quarters of the lifespan and there is a need for a vision of the lifespan which includes lifelong and lifewide learning. Existing demographic data can contribute to the management of adult learning by providing macro economic and social data on the qualifications levels of a population by age cohorts and clear information on the relationships between the different cohorts in this regard. Such data can be linked to national qualification frameworks and the European Qualification Framework (EQF) and can provide useful information on the capacity of the population to engage in social and economic activities.

Building on this demographic data as baseline information at any one time, adequate monitoring of education, training and learning activities can help to provide a comprehensive picture of the existing adult education and training systems/activities and outcomes (skills, qualifications, progression) and determine the level and effectiveness of provision nationally and with reference to other countries.

Relevant evidence can help to illustrate the relative strengths and weaknesses of different sectors within adult education and training systems, help to promote equitable access to and participation in, adult education and training and assist in the formulation of effective policies<sup>1</sup>.

The 2006 Communication from the European Commission *Adult learning: It is never too late to learn*<sup>2</sup> emphasises that reliable data are essential to the development of evidence-based policies. The Communication highlights the need for better insight into the benefits of adult learning and the barriers to its uptake, and for better data on providers, trainers and training delivery. More focus on trends and forecasts is also needed in order to support policy-making and programme design. One of the five key messages of the Communication focuses on the need to explore best approaches to improving statistical monitoring in the adult learning sector.

The European Commission's 2007 Action Plan on Adult Learning *It is always a good time to learn* draws attention to the urgent need to create a common language and common understandings to overcome the misunderstandings and the lack of comparable data in the sector. In this regard the Action Plan recommends that a study be launched by the Commission to develop a glossary of

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<sup>1</sup> UNESCO Institute for Education (1997) Monitoring Adult Learning.

<sup>2</sup> [http://ec.europa.eu/education/lifelong-learning-policy/doc58\\_en.htm](http://ec.europa.eu/education/lifelong-learning-policy/doc58_en.htm)

agreed terminology and to propose a set of core data to facilitate a two- yearly monitoring of the sector.

## 2.1 National data

The countries which participated in the PLA do not have a unified national methodology for recording the participation of adults in adult education and training, formal or non-formal. Data for measuring participation of adults in education and training are usually collected by the national statistics offices through the Labour Force Survey.

The majority of countries also mentioned their contribution to the Eurostat Labour Force Survey, the Continuing Vocational Training Survey (CVTS) and the Eurostat Adult Education Survey.

## 2.2 International data

Supra-national bodies such as the OECD, the EU and UNESCO have made and are making significant contributions to data collection at international levels in specific areas of adult learning.

The OECD undertook the first international comparative survey of adult skills in the International Adult Literacy Survey (IALS) undertaken in three rounds of data collection between 1994 and 1998<sup>1</sup>. Building on the IALS reports, the fundamental goal of the more recent Adult Literacy and Life Skills Survey (ALL)<sup>2</sup> is to shed new light on the twin processes of skill gain and loss. The OECD's proposed new survey of adult skills, the Programme for the International Assessment for Adult Competencies (PIAAC), is currently under preparation and will be administered for the first time in 2011<sup>3</sup>.

The Continuing Vocational Training Survey (CVTS1) was first conducted in 1994: CVTS2 concerns the year 1999 and CVTS3 refers to the year 2005. CVTS3 provides relatively fresh data on investment by enterprises and participation in continuing vocational training<sup>4</sup>.

The Eurostat Labour Force Survey gathers information on persons aged 25-64 who have participated in education or training in the four weeks preceding the survey.

The Eurostat Adult Education Survey (AES) provides information on participation of adults in lifelong learning. The first results, covering 18 countries over the period 2005 - 2008, were published at the end of 2008. AES gathers information on participation within a 12-month reference period by individuals aged 25-64 in formal, non-formal (and informal) learning, obstacles to participation and the costs of learning. It provides a deeper exploration of participation than the Labour Force Survey (LFS) as it looks at: the specific area of education/training; the purpose of

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<sup>1</sup> [http://www.oecd.org/document/2/0,3343,en\\_2649\\_39263294\\_2670850\\_1\\_1\\_1\\_1,00.html](http://www.oecd.org/document/2/0,3343,en_2649_39263294_2670850_1_1_1_1,00.html)

<sup>2</sup> Statistics Canada and Organisation for Economic Cooperation and Development (2005) Learning a Living: First Results of the Adult Literacy and Life Skills Survey. Ottawa and Paris: Minister of Industry, Canada and Organisation for Economic Cooperation and Development (OECD)

<sup>3</sup> [http://www.oecd.org/document/57/0,3343,en\\_2649\\_33927\\_34474617\\_1\\_1\\_1\\_1,00.html](http://www.oecd.org/document/57/0,3343,en_2649_33927_34474617_1_1_1_1,00.html)

<sup>4</sup> The survey is used to describe the numbers of participants in employer-sponsored training and personnel training days received by gender, organiser of training and field of education, for example. Under examination are also the costs incurred from the training by cost factor, used forms of training, enterprises' personnel training principles, trends of change in training and obstacles to the organising of training. The basic data are confidential. Research institutes and groups may get permission to use unidentifiable unit-level data according to a separate application practice.

participation and providers of education and training. It is planned to carry out the next AES in 2011.

## **2.3 Weaknesses in data**

Notwithstanding these international surveys and the limited national -level surveys, data on adult learning at all levels are weak or missing.

### **2.3.1 National data**

At Member State level there is limited or no information on the economic importance of adult learning, on the volume of national public and private investment in the area, on the volume of income it generates for learners, enterprises, individuals working in the sector and/or private providers, on the personal and social benefits it produces for individuals or on the wider benefits to society.

As has been said, there is no unified data collection for adult learning in the Member States which participated in the PLA and in the majority of countries there is no data chain whereby data collected at different levels feeds into the data needs of the next level of data collection. This data weakness is exacerbated by the fact that adult learning providers are multiple and dispersed, frequently operate outside the public sector and support many different forms of learning by a wide range of adults. The situation is further complicated by issues of ownership and privacy of data and rights and obligations at all levels.

### **2.3.2 International data**

The information collected by supra-national agencies does not meet the systematic monitoring and feedback needs of countries. For example, the weakness of the Eurostat Labour Force Survey from the point-of-view of policy-makers and other stakeholders is that the data are comparable across Member States only in relation to the percentage of the total participation of the adult population in education and training within a short period of time. Moreover, based on inconsistencies in definitions of adult learning, one participant in the PLA raised serious doubts about the relative percentage volumes of reported participation in adult learning in the Member States.

The timeliness of data is also a major issue for Member States. The Eurostat Adult Education Survey will not happen again until 2011 and as the collection and processing of the data take a considerable length of time results will not be available until 2013. Similarly, the first round of the proposed OECD PIACC survey will not take place until 2011.

Unsurprisingly, the adult learning data situation at national and European levels is mirrored at global level where there are multiple empirical data gaps in the existing knowledge of adult learning and adult achievement. Comparability is focused on a small number of areas, including literacy/illiteracy levels of adults (15+) and educational attainment data. This is an issue that the UNESCO CONFINTEA VI conference of global adult learning policy-makers and other stakeholders in taking place in Belém, Brazil in May 2009 is seeking to put firmly on the adult learning agenda for the future.

It was against this overall backdrop of recognised major gaps in adult learning data, in collection methods and in comparability at national, European and global levels that participants from the Member States, Liechtenstein, Norway and the European Commission came together in the Peer Learning Activity in Bratislava.

### 3 THE STRUCTURE OF THE PEER LEARNING ACTIVITY

The PLA on Adult Learning Monitoring is a key tool for the implementation of the European Commission's 2007 Action Plan on adult learning; *It is always a good time to learn*. The objective of the PLA was to bring together key stakeholders from a range of countries to share experience, to engage in discussion and to achieve mutual learning on policies and practices in the field of adult learning monitoring. The intention was/is to contribute to work already done or in progress to develop agreed, comprehensive data systems which will create baseline data, monitor progress, evaluate performance and increase the overall visibility, efficiency and effectiveness of adult learning, at local, regional, national and European levels.

A Background Report summarising the national reports provided by participating countries was sent to participants before the PLA.

The PLA took place over three days and comprised six types of sessions/activities as follows:

- **Formal presentations** on developments in adult learning monitoring policy and practice from key stakeholders in the **Slovak Republic** - policy-makers, researchers, providers and practitioners.
- **Formal presentations** by other participants in the PLA. Presentations were made by:
  - o **Norway** on monitoring adult education and learning in Norway, with particular reference to The Learning Conditions Monitor and to the Vox-mirror which presents selected data on adult participation in formal and non-formal education and training, wholly or partially funded by public budgets
  - o **The Netherlands** on models of policy-making in vocational education and training in The Netherlands
  - o **Portugal** on the New Opportunities Programme to upskill adults with low levels of education and how it is monitored at provider, regional and national levels
  - o **Cyprus** on adult education provision at a range of levels and national monitoring practice.
- **A formal presentation**, by the representative of the consortium undertaking the research, on the purpose and shape of the Commission-funded study on adult learning terminology and core adult learning monitoring data.
- **Participant small group work** on issues in adult learning monitoring: participant reflection and exchange on topics/activities/themes presented/ arising and on the development of recommendations in relation to ongoing and future work at European level.
- **End-of-day summary** of participants' discussions followed by a discussion between the organisers on the focus, structure and organisation of the following day's activities.

Interpretation from Slovak to English and from English to Slovak was available throughout the three days, apart from the small group work sessions where participants worked through English.

On the evening of 22nd March participants were welcomed to the PLA by Mr Ivan Pešout of the Ministry of Education of the Slovak Republic. On Monday 23rd March the PLA was opened by Ms Zuzana Štribiková, Academia Istropolitana. Over the three days the PLA was co-chaired by Ms Štribiková, Ms Petra Gruntová also from Academia Istropolitana, and Ms Marijke Dashorst, European Commission.

On the first morning participants were invited to present their individual expectations for the PLA which formed a checklist against which to evaluate overall PLA activities on the third day. Specific expectations included a wish to share and learn about:

1) Terminology and definitions

- adult learning terminology
- adult learning definitions, especially non-formal adult learning
- how comparability of definitions might be improved

2) Monitoring adult learning

- what is included by countries in the data collected about adult learning, especially in formal and non-formal learning?
- collecting data on informal learning
- creating a common approach to monitoring and the use of data; the comparability of data between countries.

3) Technical issues

- the first steps in monitoring adult learning
- how an indicator is constructed
- data collection methods, existing and new approaches.

## 4 KEY ISSUES ADDRESSED IN THE PEER LEARNING ACTIVITY

Over the three days of PLA activities a number of key issues emerged for consideration including:

- the scope of the term 'adult'
- definitions of 'adult learning'
- understandings of 'monitoring'
- the objectives of monitoring
- what adult learning is being monitored
- monitoring methodologies
- uses of monitoring
- challenges in monitoring adult learning
- conclusions about monitoring.

These issues surfaced as transversal themes threaded through the formal presentations by representatives from the host country and participating countries, the informal inputs from participants, the feedback from the small group sessions, the question and answer sessions and the discussions.

### 4.1 The scope of the term 'adult'

Discussion on the meaning of the term 'adult' in 'adult learning' arose mainly in the small group workshops and *en passant* in the presentations from the Slovak Republic and other countries.

In general, there was little agreement on what constitutes an 'adult' or when 'adulthood' begins in this context. Definitions by country varied from 'all who have left uninterrupted initial education' to an insistence that 'an adult' is defined by age, with 15 being the youngest age used to define 'adult' to the contention that 'an adult' is defined by preparedness for entry to the labour market.

The concept of the end of 'uninterrupted initial education' as used in the 2006 Communication *Adult learning: It is never too late to learn* to signal the beginning of adult learning was questioned. What constitutes 'uninterrupted initial education'? For example, does a 'gap year' taken at 17 or 18 years of age between the end of upper secondary education and higher education interrupt initial education? What about early school leavers? If they return to structured learning as young people they are not usually categorised as 'adults'.

A Slovak presentation pointed out that the age of participation in higher education varied across Europe with students in the Nordic countries participating on average at an older age than individuals in, for example, the Slovak Republic. Is such participation still 'uninterrupted initial education' or is it 'adult learning'? This difference between the Nordic countries and the Slovak Republic is believed to have implications for reported rates of participation in adult learning (lifelong learning) across Europe as measured by the AES and the Labour Force Survey (LFS).

Questions were also raised regarding the age parameter of 25 – 64 years of age in the LFS and the AES. How were these lower and upper age limits arrived at? Who does this parameter serve? In Slovakia, for example, the national labour force survey includes individuals aged 15+ and 'further education' is taken to refer to the non-formal education of people from the lower age of 15.

Other participants pointed to other, and sometimes multiple, definitions of the term 'adult' within their own countries.

Clearly an agreed definition of the term 'adult' in the context of 'adult learning' is a fundamental requirement for the monitoring of adult learning - locally, regionally, nationally and at European level - and one that will need to be addressed by the study on terminology and definitions launched by the European Commission. However, it is inevitable that even with the best efforts to agree terminology and definitions a 'grey zone' in areas of transition between categories will always exist. This should not halt or interrupt the monitoring of adult learning. Rather, there are questions to be addressed such as: how to live with the reality of this 'grey zone'? How to identify and monitor the 'grey zone'?

## **4.2 Definitions of 'adult learning'**

The presentations on adult learning monitoring in Slovakia and in the other participating countries covered the monitoring of formal and non-formal adult learning, with the emphasis on the former in the presentations by the Slovak Republic and Cyprus and on a mix of both in Norway and Portugal.

Participants working in small groups on the issue of the scope of adult learning monitoring were not in agreement about the elements of adult learning that should be monitored. All considered that formal and non-formal learning should be monitored, but no agreement was reached about the inclusion of informal learning as a subject for monitoring. In general, strong doubts were expressed about authorities' ability to define and operationalise 'informal learning' in an unambiguous way. It was considered that this presented serious challenges to any attempts to monitor informal learning in a way that would produce useful and comparable data.

To add to the complexity, a Slovak presentation drew attention to the inclusion a fourth category, viz., 'random learning' in the Eurostat classification. The same presentation referred to the basic unit of 'learning activity' and distinguished clearly between learning (on the learner's own) and education (within the framework of organised activity). A typology based on the concepts of 'intentionality', 'institutionalisation' and 'being in the NFAQ' was used to distinguish between formal, non-formal and informal learning.

It was pointed out that the AES covered informal learning and may be able to direct national authorities towards an appropriate methodology in this regard.

The issue of which field/segments/sub-sectors of adult learning are taken into account in monitoring was raised. Many of the participants saw monitoring as referring only to learning for the labour market so as to be able to adjust policies and courses to meet labour market needs. A smaller number considered that lifelong learning was for much more than the labour market and included general education for upskilling, social inclusion, citizenship, personal and social advancement, leisure and pleasure. Portugal was insistent that adult learning is about outputs and not just inputs and asked if engagement in the process of the validation of prior learning outcomes should be considered participation in adult learning.

Clearly a monitoring body's objectives inform/focus its definitions of 'adult learning' – and vice versa. Participants drew attention to the existing Eurostat terminological framework at EU level.

### 4.3 Understanding of monitoring

While there was limited specific discussion on the meaning of the term 'monitoring' a variety of understandings of the term was implicit in the presentations and discussions during the PLA. The majority of the approaches referred to measuring an aspect of adult learning to provide information for a range of purposes and all displayed a strong preference for input indicators and quantitative data. The point was made that it is important to distinguish between monitoring at national and at European levels.

The presentations by the Slovak Republic revealed a range of monitoring subjects/activities as follows:

- 1) Related to the labour market
  - identifying labour market and skills needs
  - computer profiling of occupations for use by potential employees to measure their compatibility and any gaps in their competences
  - identifying educational needs for the labour market
  - using data obtained from monitoring/forecasting educational needs in the preparation of education programmes
- 2) Related to institutions
  - collecting data on the basic characteristics of educational organisations - type, legal form, area of activity
  - collecting data on financial resources
  - collecting data on education and training personnel - number, education levels, internal/external employee, organisation
  - collecting data on educational activities and numbers of participants and graduates.

The presentations by the other participating countries covered monitoring activities such as:

- collecting data on participation rates in adult education and training
- collecting data on the number of adults in different phases of the validation process
- comparing the level of results with the annual goals
- collecting data to develop policies responsive to labour market and other needs
- measuring the satisfaction levels of the public in relation to education and training provision.

### 4.4 Objectives of monitoring

To date much of the discussion on adult learning monitoring has focused on technical issues to the detriment of focus on the needs of key stakeholders in monitoring, viz., policy-makers, funders, employers, providers and individual learners.

The UK/England national report made the strong point that it is vital to start with a clear understanding of what we want to monitor and why.

Certain understandings of the objectives of national-level adult learning monitoring were implicit in the presentations made during the PLA. The following list indicates the overall objectives that emerged. Taken as a whole they cover monitoring to inform and support policy-making, to

evaluate policy implementation and to evaluate policy-making itself. Objectives that emerged from the presentations include:

- 1) to enable evidence-based policy-making
- 2) to provide information for policy-makers about learning demand and learning outcomes through:
  - identifying which adults are participating in which adult learning and which adults are not participating in any formal or non-formal adult learning and why/why not?
  - measuring effectiveness and impact by measuring outcomes, including qualifications and/or skills levels and progression
  - providing evidence of impact and added-value in terms of economic and social benefits so as to stimulate investment by public authorities, employers, civil society and individuals in adult learning
- 3) to provide information for policy-makers, the social partners, providers and individuals on local, regional and/or national labour markets trends and needs
- 4) to provide feedback to providers as to the effectiveness of their programmes so as to enable a better response to the learning needs and demands of individuals and improve the quality of provision
- 5) to monitor and evaluate policy-making and test the robustness of policy options through:
  - measuring efficiency
  - measuring effectiveness/impact of measures
- 6) to facilitate comparability within a country by region and progress over a time period, in relation to other European countries and within a global perspective.

Working in small groups, participants in the PLA had a wide-ranging discussion on the objectives of national-level monitoring and added the following specific and, in many cases, more operational objectives to the above list:

- 1) to provide feedback to policy-makers on levels of social justice, including the integration of immigrants
- 2) to improve the quality of adult learning through:
  - monitoring teacher numbers and qualifications
  - improving transparency for all stakeholders
- 3) to monitor returns to the labour market from adult learning, including providing information on:
  - basic skills and qualifications levels
  - skills, qualifications and progression achieved
  - gaps in skills and employability
  - the volume of validation of non-formal and informal learning
- 4) to feed into data collection at European level including:
  - providing comments on Eurostat definitions/categories

- suggesting that an employability indicator be incorporated in the Adult Education Survey

A number of participants believed that a basic principle of adult learning monitoring is that the collection of basic data should be obligatory for all providers, public and private, and that within countries an agreed basic data collection format should be provided by National Statistics Offices.

While participants found it challenging to agree on a small number of objectives, ultimately, they prioritised the objectives in the above long lists into two objectives as follows:

- 1) to support policy-making – in fact many of the objectives listed above were considered to be sub-objectives of this objective
- 2) to monitor returns to the labour market from adult learning.

Participants were of the opinion that information in relation to the impact of adult learning on the labour market is what most influences politicians and funders.

#### **4.5 Areas that are actually being monitored**

Presentations from the Slovak Republic and other countries revealed that the following areas/fields are currently being monitored in individual countries:

- labour market participation
- the needs of employers
- participation in adult education and training
- provider activities
- validation of non-formal and informal learning - users; cost benefit
- participation in basic education by gender and by minority language background
- participation in host-country language training and social studies by gender
- participation by age, gender and education levels
- generation and analysis of national data on basic skills.

However, not all of the countries participating in the PLA are systematically monitoring all of the above areas.

#### **4.6 Monitoring methodologies and methods**

In general, the technical aspects of monitoring were given less attention during the PLA than the policy, employer, provider and individual-related aspects. This arose partly because of a feeling that the technical elements is where the focus often starts and ends in discussions about monitoring and partly because those present were more representative of policy-makers than technical personnel and thus more focused on the needs of a wide range of stakeholders, including policy-makers themselves, employers, providers and individuals.

As has been said, none of the countries participating in the PLA has a unified methodology for recording the participation of adults in education and training or in adult learning in general. National statistical services are involved in data collection in the majority of countries and/or specific bodies with responsibility for the collection and analysis of education and training data.

The majority of participating countries also referred to the role of the CVTS (Continuing Vocational Training Survey) and the AES (Adult Education Survey).

The challenge is that in the majority of countries different sources of data exist and the outputs do not necessarily harmonise across surveys because of differing concepts and definitions, differing data collection protocols and differing reference periods. There was a general sense that education and training personnel at all levels need upskilling in relation to all aspects of adult learning monitoring, including an awareness that they are contributing to overall strategic aims and objectives.

Basic parameters for monitoring adult learning suggested by participants included:

- participation rates – formal and non-formal
- education levels on entry and exit from a course/programme so as to be able to measure progress, including any validation of non-formal and informal learning
- costs - How much does learning cost? How much are states, regions, enterprises, individuals willing to pay?
- guidance and counselling – availability, role, impact. Are guidance and counselling an intrinsic part of the learning process or an external add-on process?
- teacher/trainer qualifications
- returns on learning - economic/non-economic; qualifications/skills
- obstacles to participation in lifelong learning as well as solutions and good practices.

#### **4.7 Actual uses of monitoring**

A range of presentations covered the uses of monitoring, explicitly and implicitly. Presentations from the Republic of Slovakia indicated that uses of the labour market surveys include:

- providing feedback to government ministries about the effectiveness of policies and practices
- providing feedback to adult learning providers on future trends on the labour market and in relation to where it might be appropriate to concentrate scarce resources
- providing feedback to employers, welfare authorities, education authorities and providers about reasons why unemployed adults do not take up work opportunities
- providing qualitative (what?) and quantitative (how much?) feedback on actual and future education and training needs

In Portugal regional structures of the Ministry of Education and the Ministry of Labour and Social Solidarity and the National Agency for Qualification can access information regarding the New Opportunities Centres (NOCs) under their direct responsibility. NOCs can access their own results, as well as regional results. The overall intention is to:

- assure high levels of quality in NOCs
- enable the National Agency for Qualification to intervene in the network regulation, detecting potential disruptions and promoting good practices
- provide updated information to regional structures and to Ministry of Education and Ministry of Labour and Social Solidarity.

Monitoring is linked to quality assurance in many of the participating countries, including Cyprus, Netherlands, Norway and Portugal. In Portugal it contributes to the development of a management information system (MIS) which gathers information on adults enrolled in the validation of non-formal and informal learning process as well as on adults attending education and training courses. The MIS is being developed so that in the short-term it includes data on all the qualification pathways being followed by individuals (adults and young people). The system also supports the adjustment of training provision to identified needs.

The Netherlands presentation raised the question of how the information generated by monitoring can be used to create policy. Scenario planning was suggested as a useful approach to help policy-makers to consider different views of the future based on current information.

Interestingly, the extent that Cedefop skills forecasts were used by policy-makers in the participating countries was unclear. Only a minority of participants were able to say that the skills forecasts were used by policy-makers in their countries.

There was a general belief that the results of monitoring needed more systematic and focused use in many countries to move away from the sense of 'We've gathered it, now what will we do with it?' that appears to pervade many levels of adult education and training. In other words, data need to form part of structured management information systems for stakeholders at all levels and to be based on an analysis of the lifelong learning of the entire population, including young people and adults.

#### **4.8 Challenges to be solved in adult learning monitoring**

A number of the presentations referred *en passant* to challenges relating to monitoring of adult learning which must be addressed at national and at European levels. Participants working in small groups also addressed the issue.

The main national-level challenges identified by the presentations include:

- a great number of small non-systematic solutions that do not cover all the elements of lifelong learning
- methodological variations that do not allow for comparison of data collected across diverse surveys – between the past, the present or the future; between regional and local levels *within* countries.
- the problem of periodicity and the long time lag between reference period and data availability
- difficulties in data matching in the area of labour market and education
- the failure of many providers to return data or their tendency to return incomplete data and the lack of sanctions for non-return of information
- a danger of educational authorities overestimating their capacity for monitoring and forecasting
- lack of involvement by the social partners in adult learning monitoring in many countries, for a wide range of historical, legislative, policy and practice-related reasons
- employers' lack of capacity in relation to defining future needs in a long-term context, especially SMEs which generally do not have a vision for a long timeframe. This situation is exacerbated by the current global financial crisis

The participants working in small groups added the following national –level challenges to the above list:

- an underlying lack of articulation between the different elements of the adult education and training sector
- multiple stakeholders, statutory, private and community-based leading to multiple goals and practices
- diverse principles of monitoring
- duplication and gaps in monitoring
- lack of transparency about the uses of monitoring – for example, the use to which assessment results may be put
- the need to monitor rates of return on validation of non-formal and informal learning as well as participation in adult education and training, progress in education and training and qualifications gained
- the lack of a tradition of monitoring impact in adult learning
- the role of national statistics offices which give a basic format for data collection without consultation and without upskilling respondents
- the limited skills of providers to gather data for monitoring
- survey fatigue in some countries, particularly on the part of providers. ‘How much can institutions be expected to deliver?’
- lack of continuity between adult learning monitoring practices between different levels, viz., provider, local, regional, national and European levels with resultant discontinuities between data generation at all levels and in relation to feedback between the different levels
- the cost of monitoring.

The main challenges at European level to be addressed and to be solved were identified by the PLA as follows:

1) Challenges in relation to common approaches

- clear definitions, formats and methodologies are required at European level to guide local, regional and national practice
- the issue of definitions of adult learning and age parameters needs to be addressed to increase the reliability and, thus, credibility of, for example, the Eurostat Labour Force Survey results in relation to the achievement on the benchmark of 12.5% participation in lifelong learning
- output indicators are required to complement existing input indicators
- common instruments/tools need to be developed at European level or by co-operation between groups of countries.

2) Challenges to the Eurostat Labour Force Survey

- the Eurostat Labour Force Survey covers all education and training without reference to the level at which the specific level of education or training takes place. Therefore,

the survey is not necessarily measuring the same levels of learning in the different Member States

- the fact that the Eurostat Labour Force Survey is carried out four times a year means that seasonal aspects impact on it and therefore the different quarters will generate different results
- the use of the 4-week reference period should be reviewed.

### 3) Challenges to the Eurostat Adult Education Survey

- the Adult Education Survey will not take place again until 2011 with results in 2013
- with all European level surveys there is a difficulty of time lag in relation to the publication of the results. Adult learning stakeholders cannot wait until 2013 for the next comprehensive survey of the sector.

There are challenges intrinsic to the data at all levels including;

- lack of useful data, including flow data to show rate of progress and added-value
- lack of a sense of ownership of data leading to failure to use information actually provided by data
- lack of familiarity in the Member States with European-level data on adult learning
- lack of harmony between data actually collected by local, regional and national authorities in countries across Europe and with European-level data – ‘the data simply cannot talk to one another’
- concerns about the credibility of data - ‘figures must be real, must be trustworthy’
- in Liechtenstein as a lot of learning takes place outside the country it is difficult to collect decent national data – guidelines from EU as to how these data might be collected would be welcome
- there is a need to bring together on a regular basis the results of key European surveys on adult learning in short, readable reports along the lines of the Eurostat *Statistics in Focus* series.

## 4.9 Conclusions about monitoring

All participants were in agreement with the clear need for improved quantitative and qualitative data on adult learning for accountability and improvement.

Participants were reminded of what they might do to progress this agenda on their return to their home countries, including:

- identifying the different public bodies involved in monitoring at national level
- using the results of the PLA as a platform to bring these bodies together along with other stakeholders in adult learning
- communicating the findings of the PLA to as wide a range of national stakeholders as possible through whatever means possible
- using the results of the PLA to establish a national debate about adult learning monitoring and to argue for the need for urgent attention to be focused on the area.

## 5 OVERALL CONCLUSIONS AND RECOMMENDATIONS

In the course of reviewing the Slovak Republic's and other countries' adult learning monitoring policies and practices the PLA stimulated a high level of discussion and debate and a range of conclusions and recommendations was arrived at by participants. In the final evaluation session participants who were of the opinion that the PLA had been extremely well organised, before and during the PLA ('excellent'; 'perfect'; 'wonderful') were also asked about the extent to which the PLA had met the expectations set out by them on Day 1. All were of the opinion that they had learned much about adult learning and adult learning monitoring. Comments included:

- 'Got to understand a lot about adult learning.'
- 'Happily surprised by . . . presentation.'
- 'Helped me reflect on matters that are important for my country.'
- 'I'm leaving wiser.'
- 'It was great to see what other countries are doing and to be able to link up with them.'
- 'The PLA needs to be followed up back in our own countries.'
- 'Lots of monitoring to do; big challenges ahead.'
- 'Monitoring is very difficult. I'll see if we can work on the monitoring of teacher qualifications in adult learning.'
- 'I'll take the findings of the PLA home and hope that I will be heard.'
- 'We'll put more emphasis on monitoring from now on. There is a lot of work to do.'
- 'We may need to look at monitoring the pre- and post-adult learning status of individuals.'
- 'It would be important to ensure that the findings of this PLA are linked to the findings of other PLAs that have covered similar issues.'
- 'It's important to have a follow-up to the PLA. It shouldn't be an isolated event.'
- 'The small groups were a useful approach.'

Two participants suggested ways in which the PLA might have been improved:

- 'Would have liked one or two more inputs from other participating countries . . . '
- 'Had hoped there would be more about monitoring problems.'

### 5.1 Overall conclusions

In the context of the overall need for good information in all countries to respond to increasingly rapid developments, complex contexts and unpredictable futures, all participants in the PLA contributed to the conclusions that follow. However, European countries are at quite different stages in terms of the development of national monitoring systems and strategies for adult learning. Accordingly, the extent to which the conclusions below refer to individual countries depends on the extent of the development of their systems, strategies and practices for adult learning monitoring.

Conclusions arrived at over the three days of the PLA included:

- Failure to demonstrate the benefits of adult learning is a major weakness in the sector. Monitoring of adult learning has a key role to play in this regard.
- A new sense of urgency is required throughout Europe in relation to the challenges posed at all levels by the lack of useful data on adult learning.
- There is a critical need for data to underpin policy and practice in adult learning. This is important for all countries, those at the early stage of developing adult education and training provision and those countries that have been active for decades in the field and may be seeking direction about how to proceed in times of economic downturn.
- Reliable and comparable baseline information on education and skills levels of the adult population is an essential foundation and departure point for addressing the education and skills needs of adults in all country.
- Clarity on *what* is to be monitored is critical.
- The tension between monitoring the *transversal* and *specific outcomes* of adult learning needs to be addressed.
- Clarity on *what it is useful* to monitor is essential.
- Clarity on *why* something is to be monitored is critical.
- Clarity on *the use that will be made* of the data generated by the monitoring is critical to avoid waste of effort and money and in the interests of transparency to all stakeholders.
- There is a need to recognise what *can be* monitored and what there is the capacity to monitor.
- There is a critical need for agreement on adult learning terminology as terminology is not fixed even within countries, not to mention between countries. Without agreement on terminology it will be impossible to 'speak to one another' about adult learning.
- There is a need for clear definitions at European level which can then be used at national, regional and local levels.
- The question of whether all kinds of adult learning – formal, non-formal and informal – should form the subject of adult learning monitoring should be addressed by the study on adult learning terminology and monitoring launched by the Commission and recently begun.
- It is too early to include informal learning in the monitoring process. Arriving at an unambiguous, agreed definition of informal learning is very challenging. In the absence of such a definition, it is very difficult to monitor informal learning and attempting to do so may not produce any information of use to policy-makers or providers.
- While monitoring formal and non-formal adult learning is the immediate priority, a qualitative study would be a useful step towards building an understanding of informal learning.
- Placing adult learning monitoring on the overall national adult learning agenda is essential. This key first step will be evidenced by the integration of adult learning monitoring policies and targets in overarching national development policies and strategies. Demographic change among others points to the urgent need for such policies and targets.
- Significant commitment, time and resources on the part of stakeholders are required to secure improvements in adult learning monitoring.

- The development of a specific resourced national action plan for the adult learning monitoring is vital.
- The monitoring and evaluation roles of the responsible authorities require definition, training and action. The skills of staff at all levels and their development to respond to the need for adult learning monitoring remain to be put on the agenda in the majority of countries.
- For a regular update (on a two-yearly basis) of the developments in the sector, a minimum set of core data is required.
- Indicators need to go beyond input indicators to include output indicators.
- The different purposes of monitoring at different levels, viz., local, regional, national and European levels, need to be more explicitly understood, stated and acted upon by stakeholders at all levels.
- There is a need to address the lack of continuity between adult learning monitoring practices at different levels, viz., provider, local, regional, national and European levels with resultant discontinuities between data generation at all levels and in relation to feedback mechanisms.
- Monitoring methodologies need development and dissemination, particularly at country levels, so as to establish a data chain based on the principle of ‘collect once, use many times’ and linking all levels from individuals to providers to policy-makers to national and European monitoring bodies.
- Partnerships of stakeholders at all levels are a key requirement for the development of an effective adult learning monitoring system – in-country and at a European level. A feedback loop from practice to policy to practice is necessary to enable providers, employers, practitioners and participants to inform policy and influence policy changes.
- The key role of the European Commission in monitoring headline adult learning indicators at European level was underlined. Many participants were keen to strengthen and build on existing European surveys as a means of monitoring these headline indicators.
- There is a need to address the fact that CVTS, Eurostat LFS, AES and PIAAC all survey/will survey different elements/aspects of adult learning – different ages, reference periods, respondents. This failure to harmonise data at supra-national level contributes to and exacerbates the lack of harmony in data at local, regional and national levels.
- A proposal for a uniform framework for adult learning monitoring emerged from the small group work to include: definition of key areas and target groups; sources of information; methods of information acquisition; measurement units; monitoring times; publication and use of results.
- Some key underpinning questions emerged from one of the presenters: Is quantity important? Why? Is quality important? Why? Is quality equal to ‘job relevance’ or something else?

## **5.2 Recommendations to the European Commission in the context of the Action Plan *It is always a good time to learn***

The following recommendations to the European Commission in the context of the Action Plan *It is always a good time to learn* emerged *en passant* during the PLA. It should be noted that the recommendations arose organically and variously from the presentations and the discussions and that as a whole they do not necessarily represent the opinions of any one country participating in the PLA.

The European Commission should:

- Bring the results of the PLA to the Working Group on the Action Plan *It is always a good time to learn* and place adult learning monitoring firmly on the agenda of that Working Group.
- Pursue with vigour the key message and plans of the 2006 Communication and the Action Plan in relation to adult learning monitoring.
- Support the generation of a sense of urgency in Member States to address the challenge of adult learning monitoring with reference to the consequences of no action on the challenge.
- Support Member States, as appropriate, to communicate the message of adult learning monitoring to stakeholders and to develop the frameworks and skills to grow adult learning monitoring policies and practices.
- Develop guidelines to support the monitoring of adult learning at local, regional and national levels in the Member States.
- Continue and expand the monitoring of headline adult learning indicators at European level, taking into account the results of the study launched by the Commission on the glossary of agreed terminology and core data and existing surveys and data so as to improve the harmonisation of concepts and definitions and expand coverage, frequency and timeliness.
- Ensure that as many Member States as possible buy into the collection of core data based on the results of the study on the glossary of agreed terminology and core data and their publication in the Joint Progress Report on Education and Training 2010.
- Complement key benchmarks at EU level with a mix of Case Studies to provide qualitative information, that is, provide 'numbers and stories'.
- Ensure that any changes that may emerge in the 2010 benchmark of 12.5% participation of adults aged 24-64 in any 4-week period is communicated to all stakeholders at Member State level through the Working Group on the Action Plan and the forthcoming Action Plan regional meetings.
- Act as a catalyst/provide a platform for, exchanges between experts and practitioners in the field of adult learning monitoring so as to increase through-feed of information and consistency and harmony between methodologies and methods within and between Member States and between national and European level monitoring of adult learning.
- Ensure the results of this PLA are communicated to technical and other groups involved in the development of indicators and benchmarks for monitoring adult learning.
- Address the unease of Member States that are concerned about the reliability of data generated at EU level where diverse understandings of 'adult learning' in Member States may be producing data that do not reflect the real volume of adult learning in various countries.
- Enable Member States to identify and share good adult learning monitoring practice. Develop a data bank of such good practice and support its use by stakeholders.
- Ensure a thematic focus on adult learning monitoring within the Grundtvig Action to include the option of a transnational network on adult learning monitoring and/or structured transnational exchanges (work placement; work shadowing etc) of personnel from public authorities and other organisations engaged in monitoring adult learning.
- Fund studies that will support national and European level work in the area of adult learning monitoring.

- Ensure that the results of this PLA are included on the new KSL (Knowledge System on Lifelong Learning) website at <http://www.ksll.net/> .
- Ensure that there is feedback to stakeholders about initiatives/progress in relation to the adult learning monitoring issues raised in the PLA and the recommendations arising.

## **ANNEX 1 – BACKGROUND REPORT**

# 1 INTRODUCTION

This paper is a Background Report for the Peer Learning Activity (PLA) on Adult Learning Monitoring organised by the European Commission (DG EAC) in cooperation with the Slovak Institute of Advanced Studies (*Academia Istropolitana*). The PLA will take place in Bratislava on 22<sup>nd</sup> – 25<sup>th</sup> March 2009. The objective of the PLA is to exchange experience, stimulate discussion and create conditions for close cooperation among the Member States of the European Union in the sphere of adult learning monitoring. During the PLA this background paper will serve as an information source on national policies and practices addressing this issue.

The Background Report is a synthesis of the information provided by countries participating in the PLA. Prior to the PLA, the European Commission asked participating countries to submit a country report on developments with regard to:

- monitoring adult learning in relation to the following benchmarks:
  - Participation in lifelong learning (25 – 64 years of age)
  - Early school leavers
  - Low achievers in reading
- the policy measures taken to achieve these three benchmarks and to improve the quality of adult learning staff and of investment
- the methods of measurement and the agencies which carry it out
- management information systems for providers and their function
- measurement of the quality of staff and providers.

In addition, respondents were asked to identify gaps in monitoring adult learning in their country and the requirements for a better monitoring of the sector. They were also asked to indicate lessons learned in their countries in relation to adult learning monitoring that could have application in other European countries.

Country reports were received from the following eleven countries which will participate in the PLA: Austria (AT); Bulgaria (BG); Cyprus (CY); Czech Republic (CZ); France (FR); Lichtenstein (LI); Netherlands (NL); Norway (NO); Slovakia (SK); Sweden (SE) and the United Kingdom/ England (UK en). The reports are appended in the Annex. In addition to these countries, representatives from Portugal will also attend.

## 2 EUROPEAN CONTEXT

As new priorities for adult education policy emerge in the context of lifelong learning, it is vital that better empirical evidence and on-going monitoring is available. Policy makers, providers and potential learners require information, for example, on:

- Availability, type and location of adult learning opportunities
- Profile of adult learners (e.g. gender, age, socio-economic status, educational level)
- Performance of adult learners (e.g. completion rates, learning outcomes) and of providers (e.g. staffing, quality, relevance) and
- Reasons for non-participation and incentives to participation.

Better monitoring can help to provide a comprehensive picture of the existing adult education and training systems and determine their level and effectiveness. Better evidence can also help to illustrate the relative strengths and weaknesses of different sectors within adult education, help to promote equitable access to and participation in, adult learning and assist in the formulation of effective policies<sup>1</sup>. Statistical information systems also enable policy makers to monitor developments in the sector and in the adult population. However, data on adult learning are limited, although various developments are taking place. Data weakness are exacerbated by the fact that adult learning providers are multiple, diverse and dispersed, frequently operate in settings outside the public sector and offer various forms and levels of learning. In addition, much adult learning takes place with limited or, indeed, no reference to institutions and organisations.

The 2006 Communication from the European Commission *“Adult learning: It is never too late to learn”*<sup>2</sup> emphasised that reliable data are required to develop evidence-based policies. The Communication highlighted the need for better insight into the benefits of adult learning and the barriers to its uptake, and for better data on providers, trainers and training delivery. More focus on trends and forecasts is also needed in order to be able to support policy making and programme design. One of the five conclusions of the Communication concerned the need to explore best approaches to improve statistical monitoring in the adult learning sector. The Communication sent a message to the Member States about the need to have systems which enable them to define priorities in adult learning and monitor their implementation. With regards to the Commission itself and to Eurostat, the Communication underlined their need to concentrate on making the best use of existing surveys and data, on improving the harmonisation of concepts and definitions and on expanding coverage, frequency and timeliness of data. Reliable gender disaggregated data are required.

The general objective of the Action Plan on Adult Learning *“It is always a good time to learn”*, published by the European Commission in 2007, was to implement the five key messages established by the 2006 Communication. The Action Plan drew attention to the urgent need to create a common language and common understandings to overcome the misunderstandings and the lack of comparable data in the sector. The Action Plan specified the following actions:

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<sup>1</sup> UNESCO Institute for Education (1997) Monitoring Adult Learning.

<sup>2</sup> [http://ec.europa.eu/education/lifelong-learning-policy/doc58\\_en.htm](http://ec.europa.eu/education/lifelong-learning-policy/doc58_en.htm)

- Based on a study launched by the Commission, a proposal on consistent terminology should be agreed by Member States and stakeholders. The objective of the study is also to propose a set of core data to facilitate a two- yearly monitoring of the sector.
- A glossary of agreed terminology will be developed and produced. The collection of core data will start in the Member States that wish to participate.

Accordingly, a call to tender for proposals for the study on terminology and monitoring was launched in November 2007. The specific objective of the study is twofold: (1) establish a European glossary on terminologies agreed by Member States used in the adult learning sector Europe-wide; and (2) explore the feasibility of developing, on the basis of agreed definitions and terminology, a set of core data for monitoring the adult learning sector which would be linked to the Council conclusions on Indicators and benchmarks of May 2007. The study will be completed in 2009 and the results will be published in the Joint Progress Report on Education and Training 2010.

## 2.1 International statistics

Adult learning is not entirely a data-free zone. Supra-national bodies such as the OECD, the EU and UNESCO have made significant contributions to some areas. For example, OECD undertook the first international comparative survey of adult skills in, the International Adult Literacy Survey (IALS) undertaken in three rounds of data collection between 1994 and 1998. The results had wide-reaching implications for various participating countries as they highlighted not only the extent of adult literacy challenges but also focused on the potential importance of adult literacy levels to national economies<sup>1</sup>.

Building on the IALS reports, the fundamental goal of the Adult Literacy and Life Skills Survey (ALL)<sup>2</sup> is to shed new light on the twin processes of skill gain and loss. The skills measured in the ALL survey include prose literacy, document literacy, problem solving, numeracy and the use of information and communication technologies (ICT). Results for the first countries and regions surveyed indicate that there are significant proportions of adults in all countries who display serious weaknesses in multiple skill domains.

The first continuing vocational training survey (CVTS1) was conducted in the European Union in 1994. The collection of data for the second Continuing Vocational Training Survey (CVTS2) referred to the year 1999 and that of the third Continuing Vocational Training Survey (CVTS3) to 2005. The third survey provides relatively fresh data on investment by enterprises and participation in continuing vocational training<sup>3</sup>. The target group was enterprises with at least ten employees excluding agriculture and forestry, health and social work, education and public administration.

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<sup>1</sup> [http://www.oecd.org/document/2/0,3343,en\\_2649\\_39263294\\_2670850\\_1\\_1\\_1\\_1,00.html](http://www.oecd.org/document/2/0,3343,en_2649_39263294_2670850_1_1_1_1,00.html)

<sup>2</sup> Statistics Canada and Organisation for Economic Cooperation and Development (2005) *Learning a Living: First Results of the Adult Literacy and Life Skills Survey*. Ottawa and Paris: Minister of Industry, Canada and Organisation for Economic Cooperation and Development (OECD)

<sup>3</sup> The survey is used to describe the numbers of participants in employer-sponsored training and personnel training days received by gender, organiser of training and field of education, for example. Under examination are also the costs incurred from the training by cost factor, used forms of training, enterprises' personnel training principles, trends of change in training and obstacles to the organising of training. The basic data are confidential. Research institutes and groups may get permission to use unidentifiable unit-level data according to a separate application practice.

The Standing Group on Indicators and Benchmarks (SGIB) was set up in 2002 by the European Commission to give advice on the use of indicators as tools for measuring progress towards the common objectives set within the framework of what became the Education and Training 2010 work programme. In April 2003 a list of indicators based on valid, comparable and available data was adopted<sup>1</sup>. Achievements in relation to three of those indicators in the countries participating in the PLA are discussed in the chapter that follows.

The Eurostat Labour Force Survey continues to gather information on participation in education or training by persons aged 25 to 64 in the four weeks preceding the Survey. The weakness of this survey from the point-of-view of policy-makers and other stakeholders is that the data are comparable across Member States only in terms of the percentage of overall participation in education or training within a short period of time.

With regards to more recent developments, the OECD's survey of adult skills, the Programme for the International Assessment for Adult Competencies (PIAAC), is currently under preparation<sup>2</sup>. PIAAC will assess the level and distribution of adult skills across countries. It will focus on the key cognitive and workplace skills that are required for successful participation in the economy and society of the 21st century. Thus, PIAAC aims at developing a strategy to address the supply and demand of competencies that would:

- identify and measure differences between individuals and countries in competencies believed to underlie both personal and societal success
- assess the impact of these competencies on social and economic outcomes at individual and aggregate levels
- gauge the performance of education and training systems in generating required competencies and
- help to clarify the policy levers that could contribute to enhancing competencies.

PIAAC will be administered for the first time in 2011.

## 2.2 Early results from the Adult Education Survey (AES)

The Adult Education Survey (AES) was a pilot exercise carried out in the EU, EFTA and candidate countries between 2005 and 2008. The data presented refer to a common reference year (2007), although data vary from country to country. The survey was carried out by 29 countries in the EU, EFTA and candidate countries and data are currently available for 18 countries<sup>3</sup>. Data for the remaining countries will be available later in 2009.

The AES gathers information on participation in formal, non-formal (and informal) learning, obstacles to participation and costs of learning. The survey covers participation in education and lifelong learning activities (formal, non-formal and informal learning) including job-related activities; characteristics of learning activities; self-reported skills as well as modules on social and

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<sup>1</sup> Implementation of "Education & Training 2010" Work Programme Standing Group on Indicators and Benchmarks. Final List Of Indicators To Support The Implementation Of The Work Programme On The Future Objectives Of The Education And Training Systems. Results of The Consultation Of The Working Groups [http://ec.europa.eu/education/policies/2010/doc/indicators-and-benchmarks\\_en.pdf](http://ec.europa.eu/education/policies/2010/doc/indicators-and-benchmarks_en.pdf)

<sup>2</sup> [http://www.oecd.org/document/57/0,3343,en\\_2649\\_33927\\_34474617\\_1\\_1\\_1\\_1,00.html](http://www.oecd.org/document/57/0,3343,en_2649_33927_34474617_1_1_1_1,00.html)

<sup>3</sup> Some of the figures provided are provisional.

cultural participation; foreign language skills, IT skills and background variables related to main characteristics of the respondents. The main parameters of the survey are<sup>1</sup>:

1. Participation in formal, non-formal and informal education (FED, NFE, INF)
2. Non-participation and obstacles to participation in training
3. Participation in FED, NFE and INF activities by field of education/learning
4. Share of the job-related NFE
5. Volume of instruction hours in FED and NFE
6. Employer financing and costs of learning in FED and NFE
7. Module on language and ICT skills of the population
8. Module on social and cultural participation of the population

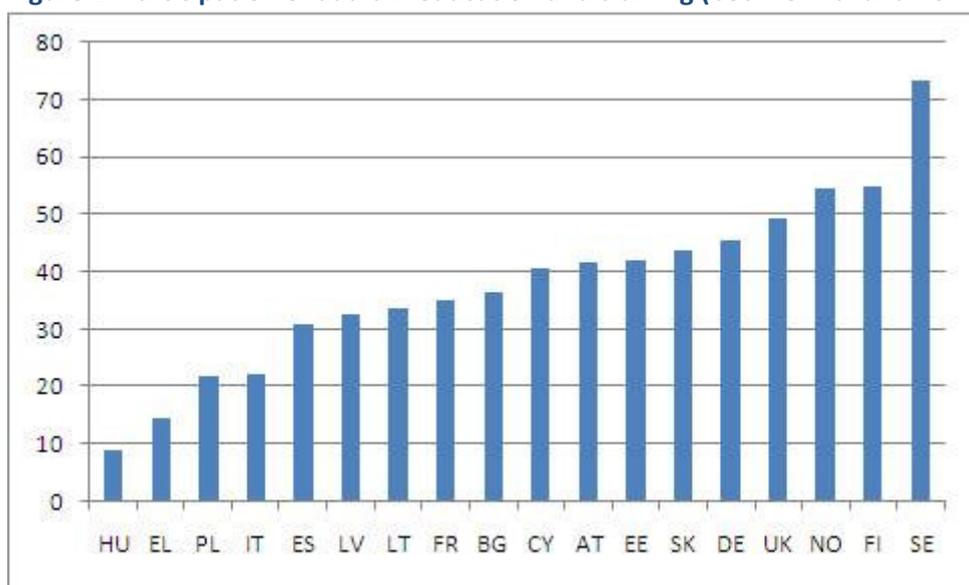
As mentioned, the AES is a pilot exercise, which, for the first time, proposed a common EU framework including a standard questionnaire, tools and quality reporting. All definitions apply to all persons aged 25-64, living in private households. The reference period of the study was 12 months. It is planned to conduct Adult Education Surveys every five years.

Of the 18 countries featuring in the early AES results presented, 8 are participating in the PLA in Bratislava, viz., AT, BG, CY, FR, NO, SK, SE and UK. A sample of the early findings is presented below and findings are supplemented by graphs created from these statistics.

### 2.2.1 Participation in formal and non-formal education and training

Figure 1 illustrates the percentages of adults who have participated in formal or non-formal education and training in the 12 months preceding the survey. The graph clearly indicates that participation of adults in learning is highest in the Nordic countries (Sweden, Finland and Norway). The participation rate is also high in the UK where nearly half of adults attended education and training in the previous 12 months. The lowest figures were recorded for Hungary and Greece.

**Figure 1: Participation of adult in education and training (both formal and non-formal)**

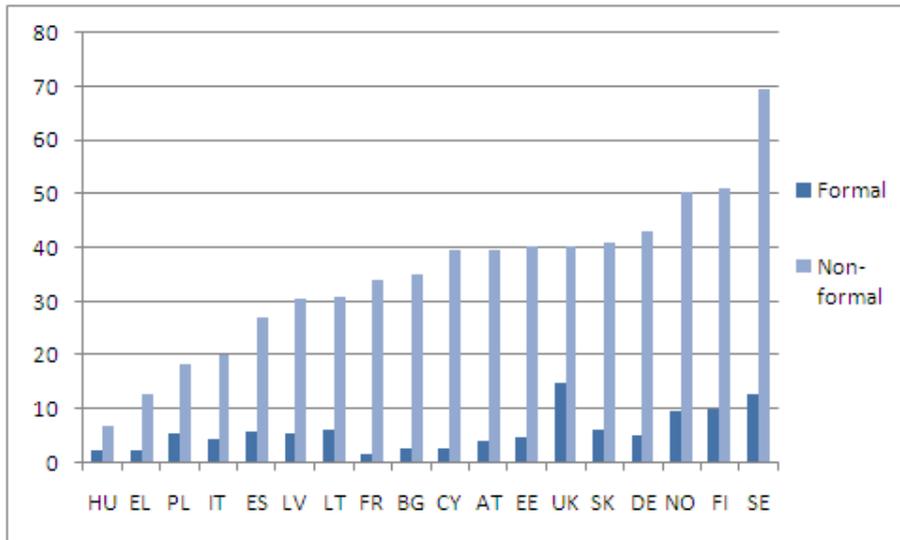


Source: Adult Education Survey, Eurostat presentation, 2009

<sup>1</sup> Eurostat 2008

The UK has the highest share of adults participating in formal education and training (15%) and Sweden leads on the share of adults participating in non-formal learning (see Figure 2). The lowest share (1.7 %) for participation in formal education and training was recorded in France; most adults in France participate in non-formal learning.

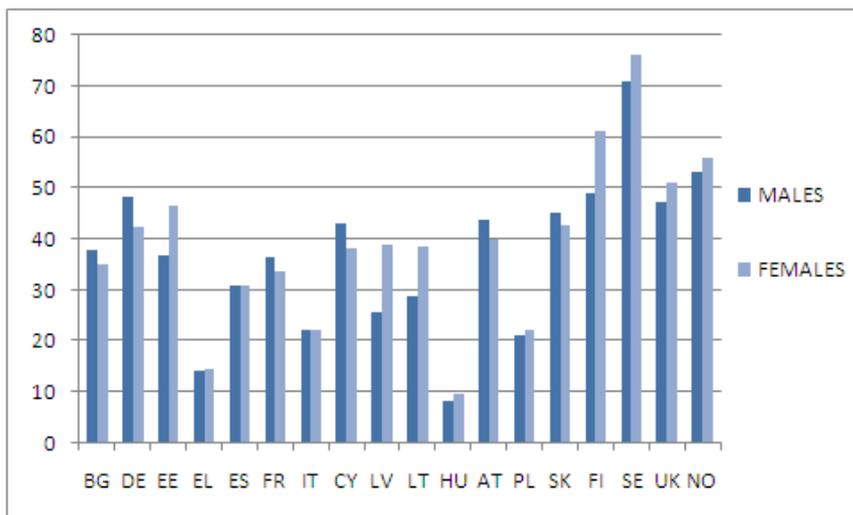
**Figure 2: Participation in formal and non-formal education and training**



Source: Adult Education Survey, Eurostat, 2009

Figure 3 below shows the participation rates by gender. In two thirds of the countries women participate more in adult learning than men. In six countries (Austria, Bulgaria, Cyprus, France, Germany and Slovakia) more men take part in formal and non-formal learning than women.

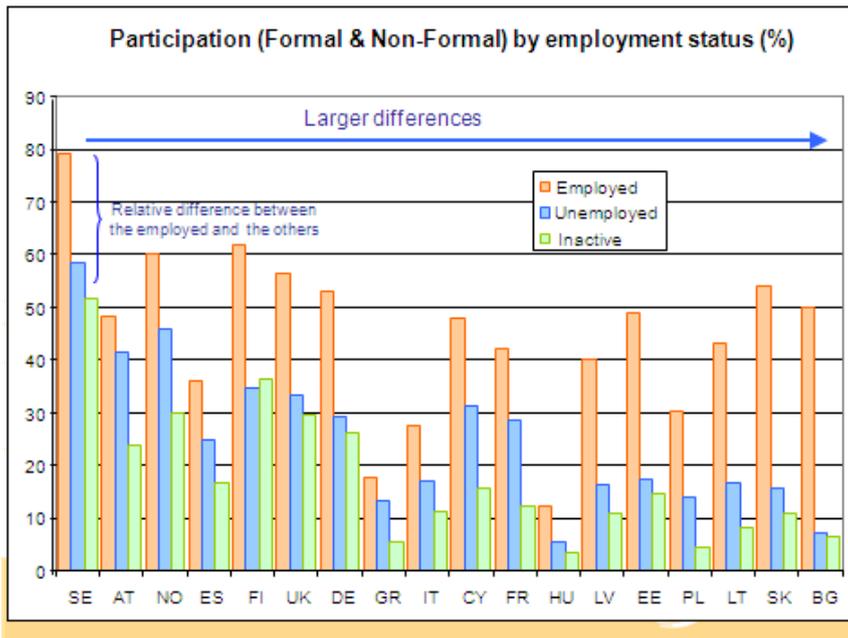
**Figure 3: Participation in formal and non-formal education and training by gender**



Source: Adult Education Survey, Eurostat 2009

Those who are employed are more likely to take part in education and training than those who are unemployed or inactive. The difference in the participation rate between employed and unemployed / inactive adults is smallest in Sweden and largest in Bulgaria.

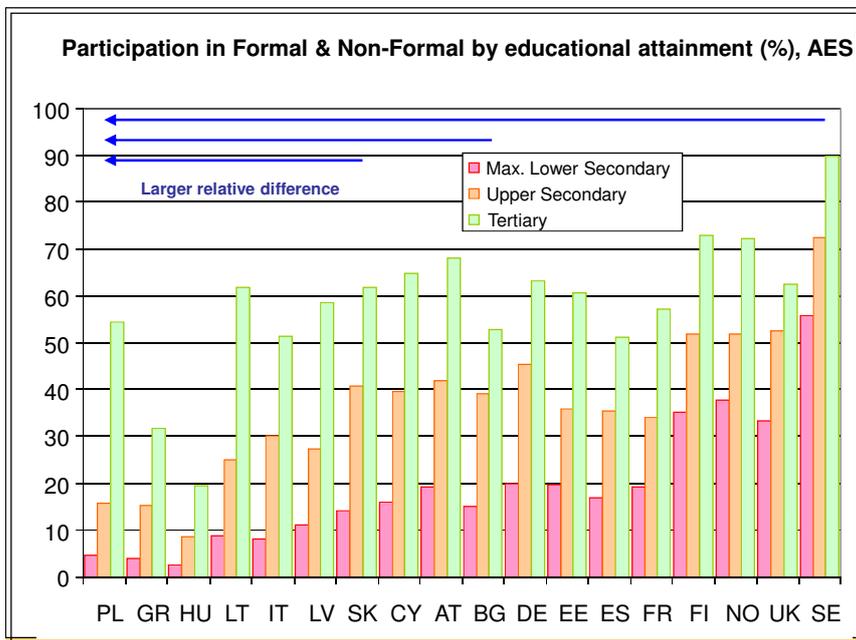
**Figure 4: Participation in formal and non-formal education and training by employment status**



Source: Adult Education Survey, Eurostat presentation, 2009

The AES re-enforces the finding of various other studies and statistics that those with low level qualifications are less likely to take part in education and training than those with higher level qualifications. The difference in participation rates of adults between the low skilled and highly educated adults is greatest in Poland and Greece and smallest in Sweden and the UK.

**Figure 5: Participation in formal and non-formal education and training by educational attainment**

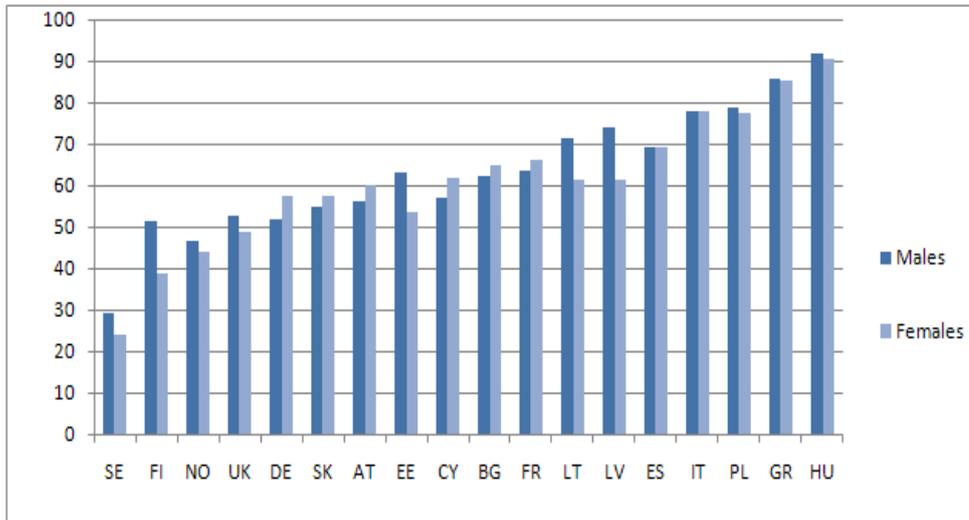


Source: Adult Education Survey, Eurostat presentation, 2009

### 2.2.2 Non-participation in education and training

Figure 6 illustrates non-participation in education and training. Non-participation rates are higher for males in most countries. In six countries, non-participation was higher for females, with the biggest differences recorded in Germany (6 percentage points) and Austria (4 percentage points).

**Figure 6: Non-participation in education and training**

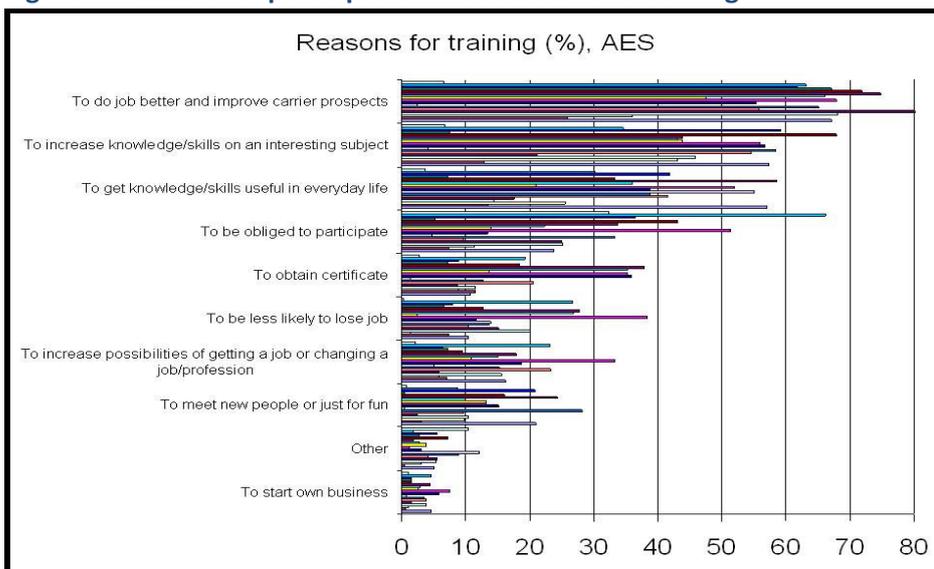


Source: Adult Education Survey, Eurostat 2009

### 2.2.3 Reasons for participation in education and training

Figure 7 illustrates the reasons for participating in education and training. Respondents selected all of the most appropriate reasons for their participation. The most popular response was the aim to improve general job performance and career prospects, followed by the wish to increase knowledge on an interesting subject or skills useful to everyday life. In many countries, obligation to participate was one of the most important reasons.

**Figure 7: Reasons for participation in education and training**



Source: Adult Education Survey, Eurostat presentation, 2009

While few people participated in learning in order to start their own business, many cited skills useful for everyday life and skills related to an interesting subject as some of their primary reasons.

The ambition to improve general job performance and career prospects with participation to education and training was stated as a main reason by many. In nearly all countries, with the exception of France and the UK, this was cited by most participants as one of the primary reasons.

It is against the above overall background of ongoing and intermittent international monitoring studies and surveys on adult learning and the national developments in adult learning monitoring as set out in the following chapters that this PLA seeks to identify, share, document and disseminate policies and practices that will contribute to work already in progress to develop agreed, comprehensive data systems which will create baseline data, establish benchmarks, monitor progress, evaluate performance and increase the overall visibility, efficiency and effectiveness of adult learning, at regional, national and EU levels.

### 3 PROGRESS IN RELATION TO THREE BENCHMARKS IN PARTICIPATING COUNTRIES

In this section the situation in the respective countries is outlined in relation to the benchmarks on:

- Participation in lifelong learning (25 – 64 years of age)
- Early school leavers
- Low achievers in reading.

For the sake of comparison this analysis is mainly based on Eurostat and OECD PISA data but has been supplemented by information from the country reports.

#### 3.1 Participation in Lifelong learning (25 – 64 years of age)

In 2002, the Member States committed themselves to develop national lifelong learning strategies and increase participation in lifelong learning (LLL)<sup>1</sup>. A benchmark was set to monitor progress; it was agreed that 12.5% of the population aged 25-64 should participate in lifelong learning by 2010.

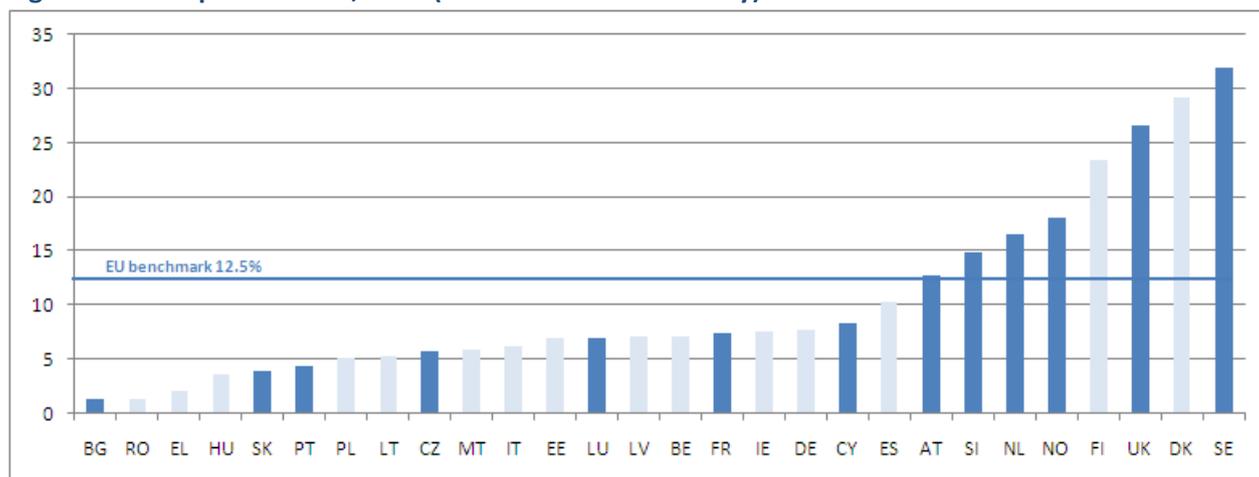
In 2000, 7.1% of the European (EU) adult population participated in learning on a 4-week reference period. This increased to 9.7% in 2007 (females 10.6%, males 8.8%) but is still behind the target for 2010. With regards to individual countries, the following trends are apparent (based on 2007 data):

- In four EU countries the LLL participation rate exceeds 20%. These countries are Sweden, Denmark, United Kingdom, and Finland.
- Further three EU countries (Austria, Slovenia and the Netherlands) as well as Norway and Iceland exceeded the target in 2007.
- The adult learning participation rate is less than 5% in Romania, Bulgaria, Greece, Hungary, Slovakia and Portugal.

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<sup>1</sup> Lifelong learning refers to persons aged 25 to 64 who stated that they received education or training in the four weeks preceding the Labour Force Survey. The denominator consists of the total population of the same age group, excluding those who did not answer to the question 'participation to education and training'. The information collected relates to all education or training whether or not relevant to the respondent's current or possible future job.

**Figure 8: Participation in LLL, 2007 (EU countries and Norway)**



Source: Adapted from European Commission staff working document: *Progress towards the Lisbon Objectives in Education and Training; Indicators and benchmarks 2008*. The Statistics include EU countries and Norway. The countries participating in the PLA have been highlighted in dark blue. 2006 data for SE and UK.

A closer look at the adult learning participation rates in countries taking part in the PLA (highlighted in dark blue in Figure 8), reveals that:

- No comparable information is available for Liechtenstein.
- In six out of the 11 participating countries, the rate exceeded the target of 12.5% in 2007. In Sweden, according to the Labour Force Survey, nearly every third person took part in education or training in the four weeks preceding the Survey.
- The national strategy in the Netherlands includes more ambitious LLL targets – to increase LLL participation to 15%.
- Bulgaria is committed to achieving its objective of 5% participation in lifelong learning by 2013.

According to the Eurostat LFS data, Bulgaria has the lowest LLL participation rate among the adult population in the EU but the AES has demonstrated significantly higher rates, and displayed significant growth in participation rates. The Cypriot stakeholders highlighted that although the LLL participation rate is still behind the EU average, the overall educational level of the population aged 15-64 is considerably higher than the EU average.

### 3.2 Early school leavers

Given the importance of education and training for young people’s opportunities and conditions for success in the transitions from childhood to adulthood and from education to the labour market, early school leaving is a topic of universal concern. Furthermore, ample evidence is available that those with higher level qualifications are more likely to take part in education and training later in life.

One of the five education and training benchmarks covers early school leavers. The aim is to reduce the EU average of early school leavers to 10% by 2010<sup>1</sup>. When the benchmark was

<sup>1</sup> According to the Eurostat definition, early school leavers are the percentage of the population aged 18-24 with at most lower secondary education and not in further education or training. It refers to persons aged 18 to 24 in the following two conditions: the highest level of education or training attained is ISCED 0, 1, 2 or 3c short and respondents declared not having received any education or training in the four weeks preceding the survey (numerator). The denominator consist in the total population of the same age group, excluding no answers to the questions 'highest level of education or training attained' and 'participation to education and training'.

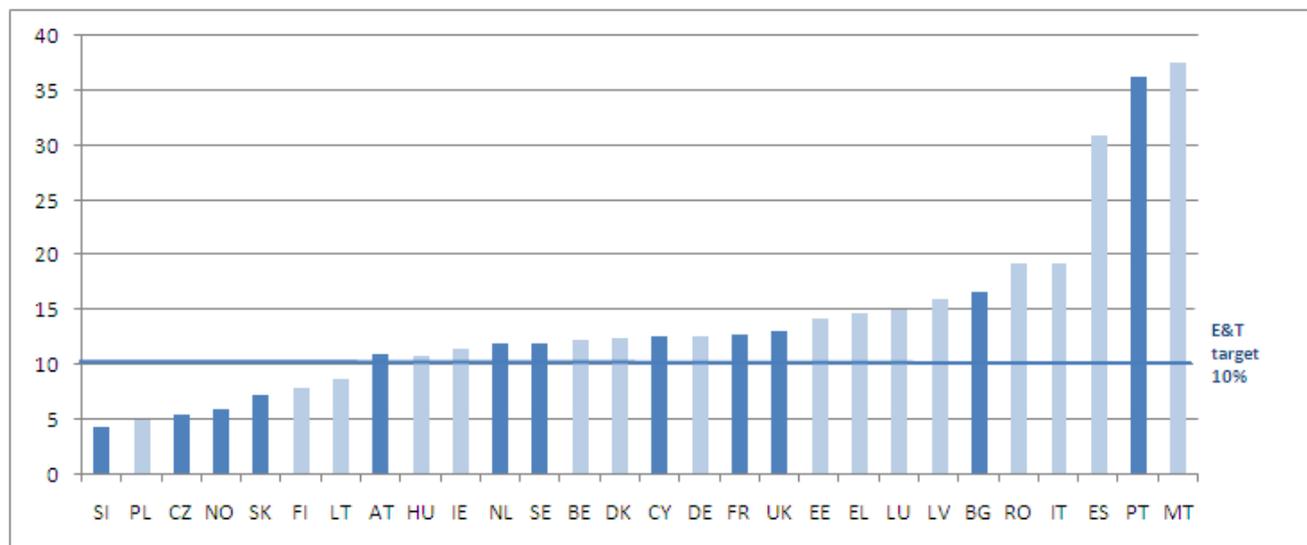
established, almost one in six young people aged 18-24 were classified as early school leavers. By 2007 with every seventh person aged 18-24 in that category, a three percentage point reduction to 14.8% had been achieved from 2000 rate of 17.6%. However, progress has been slow and strong doubts have been expressed as to whether the target of 10% can be achieved by 2010<sup>1</sup>.

The patterns of progress are diverse between EU countries. In 2007 only six countries had reached the E&T target and five of these were already below the target in 2000. Five of these six countries joined the EU in 2004: the Czech Republic, Lithuania, Poland Slovakia and Slovenia. Finland is the only longer-standing EU Member State where the early school leaving rate has been below the Lisbon target throughout the reference period. While Italy, Malta, Portugal and Spain, followed by Romania and Bulgaria, remain furthest away from the EU benchmark, some of the greatest reductions in the share of early school leavers have been seen in Malta, Cyprus, Portugal, Bulgaria and Slovenia. A reverse trend has been witnessed in six EU Member States, with the most significant reversal in Sweden.

Of those 12 countries taking part in the PLA, according to the Eurostat LFS data:

- No comparable information is available for Liechtenstein. The drop-out rate among apprentices is 5%.
- The Lisbon target has been achieved in Czech Republic, Norway and Slovakia.

**Figure 9: Early school leavers 2007**



Source: Adapted from Eurostat Labour Force Survey 2007. The Statistics include not only EU countries but also Norway and Liechtenstein. The countries participating in the PLA have been highlighted in dark blue.

With regards to trends in the share of early school leavers in the PLA countries between 2000 and 2007:

- The share of early school leavers has declined in Bulgaria, Cyprus, France, Netherlands, Norway, Portugal and the UK.
- The share has remained stable in the Czech Republic.
- The early school leaving rate has gone up in Austria, Slovakia and Sweden.

<sup>1</sup> It must be noted that the benchmark must be seen as indicative due to the caveats associated with the benchmark. For example, 12 new countries have joined the EU since the introduction of the benchmark. The increased levels of mobility and migration must also be taken into consideration.

### 3.3 Low achievers in reading<sup>1</sup>

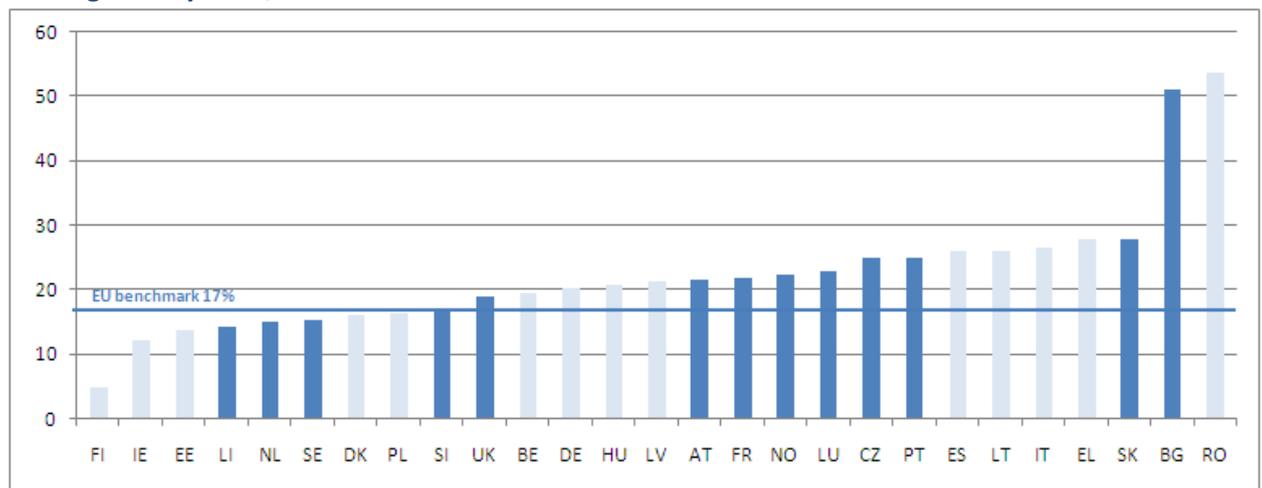
The Lisbon European Council of 2000 and the Barcelona European Council of 2002 both drew attention to the importance of basic skills. In 2003 a benchmark of reducing the percentage of low-achieving 15-year-olds in reading literacy in the European Union by at least 20% by 2010, compared to 2000, was introduced.

The benchmark is based on an indicator taken from the PISA survey, which makes it possible to identify the share of pupils who have a low level of foundation skills in literacy. Reading literacy is defined in PISA as “understanding, using and reflecting on written texts, in order to achieve one’s goal, to develop one’s goals, to develop one’s knowledge and potential and to participate in society.” The benchmark measures the share of pupils with reading literacy proficiency level 1 or lower on the PISA reading literacy scale<sup>2</sup>.

If we look at European wide trends, we can see the following:

- No comparable data are available for Malta and Cyprus.
- The proportion of low performers in reading literacy aged 15 has increased significantly in the EU, from 21.3% in 2000 to 24.1% in 2006 - a rise of more than 13%.
- In 2006 the best performing countries in Europe were Finland (4.8% of pupils were low performers in reading), Ireland (12.1%), Estonia (13.6%), the Netherlands (15.1%) and Sweden (15.3%).
- In Bulgaria and Romania more than 50% of the pupils were categorised as low performers.

**Figure 10: Percentage of pupils with reading literacy proficiency level 1 and lower on the PISA reading literacy scale, 2006**



Source: Adapted from European Commission staff working document: Progress towards the Lisbon Objectives in Education and Training; Indicators and benchmarks 2008. Information based on OECD PISA results 2000 and 2006. The Statistics include not only EU countries but also Norway and Liechtenstein. The countries participating in the PLA have been highlighted in dark blue.

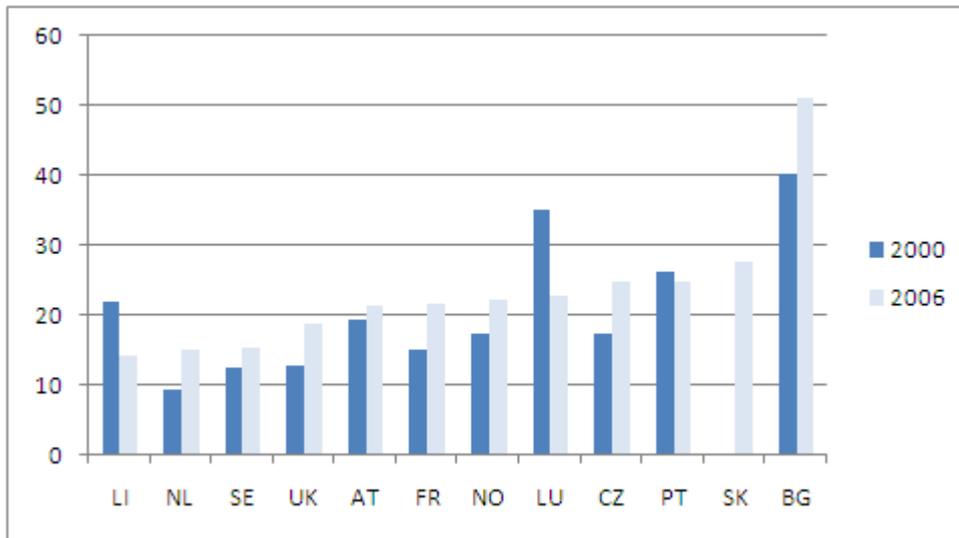
<sup>1</sup> Information based on European Commission (2008) Commission staff working document - PROGRESS TOWARDS THE LISBON OBJECTIVES IN EDUCATION AND TRAINING - Indicators and benchmarks 2008.

<sup>2</sup> Pupils performing at level 2 are able to locate straightforward information, make low-level inferences of various types, work out what a well defined part of a text means and use some outside knowledge to understand it. Pupils who fail to reach level 2 can therefore be considered to be inadequately prepared for the challenges of the knowledge society and for lifelong learning.

Trends in countries taking part in the PLA (see Figure 11) are as follows:

- Between 2000 and 2006, the share of low achievers in reading decreased in only three countries (Luxembourg, Liechtenstein and Portugal). In other countries the share has increased.
- Liechtenstein, Netherlands and Sweden (14.4%, 15.1%, and 15.3% respectively) have the lowest share of low performers in reading of the 13 countries. In Netherlands the national target is to further reduce the number of low achieving pupils to 9%. Sweden has seen a dramatic increase in male low achievers in reading.
- Only national statistics are available in Cyprus to describe the percentage of low achievers in reading. Statistics imply that 3% of young people were classified as low achievers in 2001. These statistics, however, are not comparable with those of the LFS.

**Figure 11: the share of low achievers in reading in 12 countries participating in the PLA, 2000 and 2006**



Source: Adapted from European Commission staff working document: Progress towards the Lisbon Objectives in Education and Training; Indicators and benchmarks 2008. Information based on OECD PISA results 2000 and 2006.

## 4 NATIONAL POLICY DEVELOPMENTS

This section describes policy measures to achieve the three benchmarks discussed in the previous chapter and policy measures to improve the quality of adult learning staff and of investment. The section is not an exhaustive analysis of initiatives reported in the country reports but rather gives a flavour of the range of developments taking place across Europe.

### 4.1 Lifelong learning

In the **Netherlands**, a range of **financial incentives** has been introduced to increase participation of adults in post-compulsory education and training. These concern individual incentives (e.g. tax breaks), incentives aimed at employers (e.g. tax breaks for those who facilitate their employees to obtain recognised qualifications or have their competences validated through the Dutch validation system), public employment service measures (specific retraining budget)<sup>1</sup> and incentives for regional partners (companies, educational institutions, employment services, local authorities) to work together to increase adult participation in education and training. One of the avenues currently being explored by the **Czech** authorities involves increases in financial aid for adults to attend re-training. In **France** employees are entitled to training leave to pursue the validation of their non-formal and informal learning and to address gaps in their skills within this context. In **Austria** co-financing models have been developed to encourage and support participation in adult learning.

**Workplace learning** is well placed to reflect, and quickly respond to, the needs of employees and employers. Consequently, it is being encouraged in, for example, England, Norway, Cyprus and the Netherlands. In **England**, the educational agencies are working closely with employers to encourage them to support their employees to access training. Improvement is also made to the advice and guidance that is available to individuals so that training is more accessible and it is easier for individuals to get the most appropriate training. In 2006, the **Norwegian** government established a Programme for basic skills in working life (BKA). The programme funds and monitors company-based courses on basic skills (reading, writing, numeracy and digital skills) and the purpose is to ensure that adults acquire the basic skills to meet new requirements and rapid changes in working life<sup>2</sup>. In the **Netherlands** a number of collective labour agreements in the private sector have enabled the establishment of training funds. Employers pay a certain percentage of the total wage bill into the fund, and companies are then compensated for their training costs. In **Cyprus** the re-training programmes aimed at employed adults have been diversified to take into account the changing demands of the labour market. New programmes offered by the Adult Education Centres are expected to enhance active citizenship and civic engagement, as well as integrate occupational skills in language training and computer literacy courses. In **France** employers are obliged to fund training for their employees to at least the minimum legal requirement of 1.6% of payroll and many spend a much larger share.

In the **Slovak Republic** measures to increase the participation of adults have been implemented at regional level through the National programme for learning regions. **Multi-stakeholder regional partnerships** have also been created in the **Netherlands** (45). These partnerships are encouraged

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<sup>1</sup> Please see the Dutch report for further information.

<sup>2</sup> Projects organised outside workplaces can also, on certain conditions, receive funding, provided the objective is to prepare people for working life.

by the state to work together to achieve concrete targets regarding lifelong learning. So far, these partnerships have been engaged in 65,000 work-based learning programmes and 20,000 RPL-routes (recognition of prior learning). In **France** the regional authorities work with the national authorities and the social partners to develop a regional plan which includes strategies for adult continuing vocational training which is made available according to the labour market status of the adult.

Developments in relation to **national qualifications frameworks** are also directly linked to the adult learning agenda. For example, in **Slovakia**, the national qualification framework will create the basis for the development of the system for validation of informal and non-formal learning, which is expected to increase the interest and participation of the adult population in lifelong learning.

**Promotional campaigns** (e.g. television and other media) have been implemented in various countries, for example **England**, to increase participation of adults in education and training. In **Austria** a comprehensive support programme has been launched to provide access to lifelong learning through **distance education**.

## 4.2 Early school leavers

**Preventative approaches to address early school leaving** vary from comprehensive education policy approaches based on the principle of improving the quality of the education system as a whole and for all pupils (e.g. Sweden and Norway) to targeted provisions aimed at at-risk groups (e.g. Netherlands, France and Cyprus). In **Norway**, there is a strong agreement between the social partners and the Government in relation to social justice and equity within the Norwegian education system and a common desire to raise the general level of competence for the entire population. In **Sweden**, measures to improve the education system for all pupils include upper secondary education reform, improvements in the quality of IVET and the provision of in-service training for teachers. In **Cyprus** school psychologists provide support and special programmes to help young people improve their attitude towards school and learning. In addition, personal, group and family counselling and the organization of special seminars addressed to both students and their parents are among the many approaches to helping young learners in general as well as those at risk and, thus, retain them within the school system to the completion of upper secondary education. In the **Netherlands**, schools are given financial incentives to reduce the number of young people who drop out. This is being implemented under the *Aanval op Schooluitval* (Drive to Reduce Drop-out Rates) programme. Co-operation between key stakeholders (the state, municipalities, schools, youth services, business community, parents, social workers, police and judicial authorities) is also encouraged and schools and municipalities have signed agreements to work together to reduce school drop-out by half by 2012. The agreements allow for a great degree of flexibility for local networks to choose the most suitable methods. In **France** several measures have been put in place such as early identification of at-risk students, enhanced guidance, taster courses, increased learning options and, since 2007, the reform of vocational education at secondary level to, among other objectives, enhance its status.

Another common policy approach to combat early school leaving is linked to **the length of compulsory education**. With the level of educational attainment having risen in the economically developed countries over the past decades, in most countries compulsory education now covers the primary and at least part of secondary education<sup>1</sup>. Therefore, the focus now lies on achieving

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<sup>1</sup> Darmody, M. (2008) Mapping Barriers to Successful School Transitions: Irish and Estonian Experiences. TRAMES, 12(62/57), 1, 51-72. The Economic and Social Research Institute.

ever higher levels of education and training. This is naturally linked to the empirical research findings which have illustrated that the extension of compulsory education has already shown to have significant effects<sup>1</sup>, although longer compulsory schooling does not necessarily translate into a sustainable improvement in levels of knowledge, skills or aptitudes<sup>2</sup>. Reforms to extend the length of compulsory education have been carried out during the current decade, for example, in Italy, Poland and Romania. Of the countries taking part in the PLA, similar reforms have been undertaken, or are being planned, in the Netherlands and the UK. In the **Netherlands**, a qualification obligation has been introduced meaning that young people are obliged to follow an education programme until their 18th birthday. This has already had a positive impact on educational attainment. In the **UK**, a major initiative to increase participation of young people in education and training was launched through the Education and Skills Act 2008. This means that from 2013 it will be compulsory for all young people to continue in education or training until their 18th birthday. It has been estimated that this will bring significant economic benefit to the economy (around £2.4 billion for each cohort of young people) through increases in wages and better job prospects.

With regards to remedial measures, the main focus of the Member States is **to improve the quality and attractiveness of initial vocational education and training (IVET)** and 'second chance' provision for school leavers. The concept of **second chance** education has been developed to combat the social exclusion of people who have left school without sufficient skills to get fully integrated in the labour market. Publicly supported measures exist in virtually all European countries. For example, in **Norway**, education reforms have granted school leavers a statutory right to complete primary, lower secondary and upper secondary education. Second-chance schools in all main towns of **Cyprus** offer the opportunity to early leavers to re-enter the school system. The **Swedish** government has introduced a three-year initiative (2009-11) to increase the possibilities for vocational training within Municipal Adult Education and Training for those who do not hold an upper secondary qualification or need to complement their qualifications. These short vocational courses are provided in a flexible manner, tailored to individual needs. Every **Dutch** adult has the right to acquire a level 2 qualification through publicly funded education<sup>3</sup>. In **Bulgaria**, the provision of alternative educational programmes for early school leavers, such as literacy courses and second-chance schools, are being created under the National Strategy for Lifelong Learning 2008 – 2013.

It has been widely documented that in many EU countries **drop-out is more common in vocational routes than general upper secondary pathways**. This has been highlighted as a particular problem in, for example, Norway, Cyprus and Sweden. In **Sweden**, preparations are underway for reform of the upper secondary education system. The reform will create three alternative routes: school-based vocational programmes, apprenticeships and academic higher-education preparatory programmes. All upper secondary programmes would continue to last three years, with a common basic structure. However, the contents of each of the proposed 14 vocational programmes and five higher-education preparatory programmes would be more targeted than currently. It is expected that this should allow vocational programmes lead to a vocational diploma that is regarded more highly by employers than the previous IVET qualifications. The attractiveness of IVET is being addressed in **Cyprus** as part of the Education and Vocational Reform, which directs investments towards strengthening the quality and attractiveness of Secondary Technical and

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<sup>1</sup> Kritikos, E. and Ching, C. at GHK Consulting Ltd. (2005) Study on Access to Education and Training, Basic Skills and Early School Leavers (Ref. DG EAC 38/04) Lot 3: Early School Leavers. European Commission (Director General Education and Culture).

<sup>2</sup> Wolf, A. (2002) Does Education Matter?.

<sup>3</sup> The only costs for the individual are the enrolment fees (appr. €200 a year) and the costs of books, etc.

Vocational Education (STVE). In **Austria** reform of the vocational system is underway to enable entry to colleges and universities for those who wish to pursue that route.

#### 4.3 Low achievers in reading

The country reports provide fewer examples of policy initiatives aimed at low achievers in reading. In relation to school-aged children, in the **Netherlands** the challenge has been addressed, in the first place, through the establishment of an Expert Group on Reading and Numeracy. The Expert Group has advised the government about measures to improve the basic competences of young people. One of the most important recommendations concerns the development of reference levels which describe the reading and numeracy levels 12, 16 and 18 year olds should have achieved. August 2010 is the target for the implementation of the reference levels. In **Cyprus**, young people of primary school age can attend supplementary literacy courses provided by Adult Education Centres and a literacy programme has been created for young people at lower secondary school level.

The availability of adult literacy and numeracy courses has been expanded in England and Liechtenstein. In **England**, the Skills for Life Programme offers free literacy and numeracy courses to adults aged 16+. Since 2001, 5.7 million adults have enrolled on a Skills for Life course and over 2.25 million adults have gained a first qualification. In **Liechtenstein**, the Adult Education Liechtenstein Foundation, together with the Swiss Organization of Literacy, has started a project to offer literacy courses, which are financed mainly out of public funds. In **France** a law passed in 2005 established that the primary mission of the school is the development of the young person's knowledge and skills base which is based on the European key competences.

The lowest levels of the emerging qualifications frameworks in the EU are being designed to accredit literacy and basic education learning outcomes, for example in United Kingdom<sup>1</sup>.

#### 4.4 Improvements concerning quality

The country reports provide examples of **quality improvements** within the adult learning sector. Standards are evolving and in **Norway** the Framework for Basic Skills for Adults establishes national standards for reading, writing, oracy, mathematics and ICT skills. The main objective is to increase the quality of teaching and ensure that individuals can access training that is tailored to their individual needs.

In **Cyprus**, the focus has been placed on improving the quality of the training provided by the Human Resource Development Authority (HRDA). Measures include implementation of an infrastructural support scheme, the introduction of an Assessment and Certification System for Training Providers and the introduction of a Vocational Qualifications System.

In **Sweden** the priority is to bring together all post-secondary vocational education and training (outside higher education) under one common framework. The aim is to ensure quality and national equivalence through uniform quality criteria and quality indicators for different forms of post- secondary VET, to simplify the regulatory framework, to increase transparency and to improve the labour market information available to students. This common framework will come

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<sup>1</sup> Keogh, H. (2008) Adult Learning and Education in the Unesco Region of Europe, North America and Israel.

into force in July 2009. Swedish Tuition for Immigrants is included in the new lifelong learning framework<sup>1</sup> and a new curriculum and standardised tests have also been introduced.

New regulations have also been established to govern the **qualification levels of staff** working within the adult education sector in the **UK** and, for example, in **Bulgaria** and **Sweden** teachers have been provided with **further training opportunities**. In the **UK**, regulations came into force in September 2007 requiring all newly appointed principals of further education colleges to hold or be working towards, the Principals' Qualification; mandatory qualifications for all new further education teachers entering the profession, based on new professional standards are in force; all further education teachers are required to undertake a minimum amount of continuing professional development per academic year and to be professionally registered with the Institute for Learning.

In **Bulgaria**, key competence qualification courses have benefited over 226,000 teachers and 1,151 teachers from the professional training sector have received training in different qualification forms, new technologies, interactive methods of teaching, entrepreneurial skills, foreign languages, etc. In **Sweden** the government has decided to reform the teacher education programme (objectives, structure, content and scope) and allocate additional funding (SEK 3.6 billion) to enhance continuing education and training opportunities for teachers. Teachers retain 80% of their salary during the training period. In **Austria** the Federal Institute for Adult Education and the Austrian Training Academy play a key role in ensuring the quality of adult education and training personnel.

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<sup>1</sup> This education is an entitlement for every immigrant who has taken up residency in Sweden and who is not fluent in Danish or Norwegian.

## 5 MEASURING PARTICIPATION AND ENSURING QUALITY

### 5.1 National practices

None of the countries participating in the PLA appears to have a unified methodology for recording the participation of adults in education and training. The data for measuring participation of adults are usually collected by the national statistics offices through the Labour Force Survey. However, as discussed before, the Labour Force Survey only seeks to gather information on participation in learning in the four weeks preceding the survey. The majority of participating countries also referred to the role of the CVTS (Continuing Vocational Training Survey) and the AES (Adult Education Survey).

While information is also often gathered on participation of adults in accredited courses, in most countries this is not done systematically. For example, in **Slovakia**, education institutions are obliged to provide statistical information on the implementation of educational activities to national authorities but this obligation is usually fulfilled by only 40% of all education institutions. In the **UK**, the emerging Framework for Excellence will set out how each further education college and provider is performing. Participation in literacy courses (Skills for Life) is measured by the Learning and Skills Council, through measures such as the Individual Learner Record, which is a unique number for every learner. In **Liechtenstein** each training provider has to submit an annual evaluation of the courses offered together with statistical data on participation. In **France** different sources of data exist and the outputs do not necessarily harmonise with the LFS data because of differing concepts and definitions, differing data collection protocols and differing reference periods.

With regards to the non-formal adult learning provision, in **Norway**, the Ministry of Education monitors participation through separate annual surveys carried out by the National Statistics Office and through programme evaluations. Furthermore, the participation in work-based learning activities is measured annually with additional LFS questions. In the **Netherlands** a system called 'Education Number' offers complete and reliable figures on school drop-out rates at national, regional, municipal and district levels. These data are linked to the socio-economic data (e.g. demography, nationality, ethnicity, employment/unemployment, etc.) in each region, city and district. In this way, a wealth of information is available to policy makers to adjust policy responses as necessary. The results are monitored by an institute for education research (TIER) and the on-going data analysis provides authorities with evidence on policy effectiveness.

The implementation of adult education action plans are being monitored, for example, in Cyprus and Netherlands. In the **Netherlands**, the activities implemented by regional partnerships are monitored by an independent research institute (CINOP). In **Cyprus**, a Monitoring Mechanism (National Lifelong Learning Committee and Technical Lifelong Learning Committee) has been appointed to monitor the implementation of the new Lifelong Learning Strategy Management information systems for providers

None of the countries reports having a management information system for providers. Some countries however reported that specific institutes have been assigned a role of providing information for providers.

In **Bulgaria**, education and labour market authorities have jointly introduced a pilot model for collecting, storing, processing and providing data for all stakeholders and institutions on the demand and supply of vocational education and vocational guidance at local, regional, and national level. In February 2009, the representatives from the **Cypriot** Ministries of Education and

Culture, Labour and Social Insurance and Finance and the Planning Bureau which are responsible for the monitoring of the National Lifelong Learning (LLL) Strategy decided that the management information system of the adult learning sector should be further developed through active participation and involvement of all stakeholders. Within this framework, they have decided on frequent collection of data on the progress made on adult learning through research and reporting initiatives.

## 5.2 Ensuring the quality of providers and staff

The quality of adult education and training providers and staff is a key determinant of the quality of the learning and other outcomes arising from the investment of the various stakeholders, most importantly the individual learner, in adult learning. County policies and practices in this regard are very diverse.

In **Cyprus** the quality of the returns on investment in adult learning is measured through the Monitoring Mechanism for the implementation of the National Lifelong Learning Strategy. The monitoring process is based on research as well as regular stakeholder progress reports on the implementation of the strategy and the relevant measures. In addition, research and various development activities are promoted through the University of Cyprus, the Technical University of Cyprus and the Open University of Cyprus so as to provide valid and adequate information on the progress made in relation to lifelong learning policies and practices as well as on the quality of adult learning staff and providers. Furthermore, the Centre for Educational Research and Evaluation through its involvement in national as well as international surveys identifies trends and projections of lifelong learning needs. All of these actors and initiatives provide a comprehensive and coherent framework for monitoring lifelong learning and the adult learning sector in particular.

In **France** the Office for the Professional Qualification of Training Organisations (OPQF) certifies the quality of training teams. In addition, as part of the ongoing reform of vocational training the government contributes to the development of quality training by developing the transparency and visibility of providers and supporting accreditation and quality labels developed by providers.

In **Norway**, responsibility for the quality of primary, lower and upper secondary education is in the hands of local and county authorities. There are no formal qualification requirements for teachers in non-formal adult education but more than 90% of the teachers are qualified. The **Swedish** National Agency for Education gathers data on adult education teaching staff, including, for example, the number of teachers and the proportion of staff with a teacher qualification. The Swedish National Agency for Education also presents annual data which describe the differences between various formal and non-formal learning providers. In addition, the Swedish Schools Inspectorate carries out inspections to increase the quality of education.

Quality requirements for further education personnel in the **UK** have been described in 5.4 above. The quality of the adult education provision is being monitored through the establishment of the Framework for Excellence which will set out how each further education college and provider is performing.

In the **Czech Republic**, there are no quality monitoring mechanisms in the further education field (although initial education is being monitored in a satisfactory manner). Stakeholders believe that a monitoring system should be based on a combination of external evaluation and self-evaluation and on the combination of the formal procedures and informal (experience-based) methods of quality management. There is no state-supported quality assurance mechanism of providers of

further training in **Slovakia**. Quality is ensured by the accreditation of education programmes. The legislation has not established a qualification requirement for adult educators.

The quality of staff and providers in **Lichtenstein** is controlled through the accreditation process of adult learning providers. In **Bulgaria**, the quality of the education and training system is ensured by the State Educational Standards. In vocational education and training, these are being developed at national level with social partners. The quality of vocational training in the centres for vocational training is ensured by national authorities through licensing of training institutions. In **Austria** an overall strategy to build on existing quality arrangements and to ensure overall quality standards in adult education is in preparation

## 6 CONCLUSIONS, ISSUES AND TRENDS

The country reports highlight various conclusions, issues and trends in relation to adult learning monitoring as follows (for further information see the country reports in the Annex):

- The specific reasons for creating a uniform approach to adult learning monitoring in a country are: to ensure the effectiveness of adult education and training to respond to the changing needs of the labour market and society; to support the lifelong learning process; to increase access to learning; to increase public, enterprise, civil society and individual investment in lifelong learning; to increase the attractiveness of adult learning by raising its public profile within the context of lifelong learning through identifying and measuring return on investment, that is, the benefits of adult learning for individuals, communities, enterprises and economies.
- Both policy makers and adult learning providers believe that there is a need for better monitoring of adult learning. At national level there is a need for improved databases, transparent and co-ordinated support structures and appropriate monitoring systems.
- There is an urgent need for harmonisation of definitions and categories of adult learning. For example, the relationship between formal, non-formal and informal learning is complex and the categories themselves should be revisited in the light of the growing permeability of their boundaries. The distinct definitions of adult learning in the LFS (formal and non-formal learning) and the AES (formal, non-formal and intentional informal learning) have resulted in significant variations in stated adult learning participation levels in different countries. This means that the ranking of certain Member States with regard to participation rates in adult learning have changed significantly from one survey to the other.
- The importance of background indicators cannot be over-emphasised. Whereas a benchmark or a key indicator may provide very favourable results it can at the same time give a wrong message to policy-makers if structural aspects are not taken into consideration.
- More focus should be placed on identifying methods to measure informal learning – but can informal learning be defined in the same way in every European country?
- A significant role in terms of public control is also fulfilled by informal methods of quality management (such as references/standards). To these ends, it is necessary to promote various initiatives to evaluate the entire spectrum of lifelong learning and its various components from various points of view, to provide information and decisive criteria for users and to contribute to the “culture of quality” generally. A significant role in this respect could be played by the social partners, especially the representatives of employers, enterprises and labour offices.
- Experience from the UK on monitoring the adult education sector has highlighted the need to really understand what outcomes stakeholders wish to achieve and what should be measured to check progress towards achieving those outcomes. It is important to ensure that the purpose of monitoring is understood rather than simply arranging monitoring systems around available comparable data. A number of challenges have been identified in relation to the monitoring of the sector: how to understand the relationship between skills training and returns to the economy; how to understand the relationship between skills training and

returns to individuals; how to identify the skills needs for the future; how to handle the monitoring of training that does not lead to a full qualification (i.e. individual units or informal learning).

- Adult learning in the EU should be monitored according to a uniform system and over a longer period of time. Comparative international reviews of adult education can provide valuable feedback for countries. The Czech Republic report points out that comparison of adult learning situation in their country with that of other countries is fundamental to the improvement of the sector in their country.
- In the context of an emphasis on quantitative monitoring data, the importance of qualitative data should not be undermined.

## **ANNEX 2: COUNTRY REPORTS**

These reports were prepared by participants to the PLA for their respective countries.

## AUSTRIA

### National policy developments

Bezüglich des Benchmarks zur Teilnahme am lebenslangen Lernen liegt Österreich bereits über dem EU-Durchschnitt, es werden jedoch weiterhin Anstrengungen unternommen, um insbesondere illiterate Personen und Personen ohne Basisqualifikationen anzusprechen und den Zugang zu weiterführenden Bildungsangeboten und zu Bildungsabschlüssen zu verbessern.

### Which are the policy measures taken to increase/decrease these 3 benchmarks, to improve the quality of adult learning staff and investment?

Im Regierungsprogramm für die XXIV. Gesetzgebungsperiode vom Dezember 2008 wurden für die Erwachsenenbildung wichtige Ziele und Maßnahmen formuliert. Die Bedeutung des lebenslangen Lernens als Chance zur Weiterentwicklung der Persönlichkeit, der Gesellschaft und der Wirtschaft werden hervorgehoben. Die Förderung der Basisbildung, insbesondere auch für Menschen mit Migrationshintergrund stellt einen wesentlichen Schwerpunkt dar. Die Erarbeitung von Kofinanzierungsmodellen gemeinsam mit den Ländern, die das kostenlose Nachholen von Bildungsabschlüssen der Sekundarstufe 1 und 2 ermöglichen sollen, der Ausbau der Bildungsberatung sowie Qualifizierungsmaßnahmen für haupt- und ehrenamtliche MitarbeiterInnen sowie die Entwicklung gemeinsamer Qualitätsstandards bilden weitere Elemente des Regierungsprogramms im Bereich der Erwachsenenbildung.

Bereits 2007 hat das BMUKK ein umfassendes Förderprogramm gestartet, um den Zugang zum lebensbegleitenden Lernen für bildungsferne, bildungsbenachteiligte Personen zu verbessern. Es wird im Rahmen des Operationellen Programmes Beschäftigung Ziel 2 durchgeführt und aus Mitteln des **ESF kofinanziert** (Programmplanungsperiode 2007-2013). Maßnahmen zum 2. Bildungsweg, zur Basisbildung und Alphabetisierung, Projekte zur Bildungsinformation und –beratung und zur Qualität in der Erwachsenenbildung werden im Ausmaß von insgesamt € 49,9 Mio. (nationale und ESF Mittel über die Förderperiode 2007-2013 des ESF-Ziel-2) finanziert.

Die Mittel für den **2. Bildungsweg bzw. insgesamt für Maßnahmen für bildungsferne Personen wurden bereits in den vergangenen Jahren deutlich erhöht**; ein weiterer Ausbau dieser Bereiche stellt einen Schwerpunkt der Bildungspolitik in Österreich dar.

### Lehre und Reifeprüfung

In einer **Novelle zum Berufsreifeprüfungsgesetz** wird nunmehr auch Schüler/innen aus dem dualen Bildungssystem (Lehre im Betrieb und Berufsschule) mit parallel zur Berufsschule laufenden Vorbereitungskursen der Zugang zur Berufsreifeprüfung und damit zum Eintritt in Studien an Universitäten und Fachhochschulen ermöglicht. Seit Herbst 2008 ist die Teilnahme an entsprechenden Kursangeboten aufgrund der Förderung durch das BMUKK kostenlos.

Eine Schlüsselrolle in der Sicherung von Qualitätsstandards in der Lehre kommt dem **Bundesinstitut für Erwachsenenbildung** (bifeb) zu. Es fungiert als Ausbildungszentrum für alle in der Erwachsenenbildung tätigen Personen sowie der haupt- und ehrenamtlichen Bibliothekar/innen. Es bietet außerdem auch Lehrgänge universitären Charakters im Bereich Bildungsmanagement, Bildungs- und Berufsberatung, Basisbildung und Alphabetisierung sowie Supervision und Coaching an. Die Themen der Seminarreihen und Workshops reichen von Genderforschung, Sprachendidaktik, Europa-Kompetenz und interkulturelle Kompetenz bis zum „Dialog Lebenslanges Lernen“ und weiteren Informations- und Diskussionsveranstaltungen zu aktuellen bildungspolitischen Fragen.

Seit 1. Februar 2007 existiert mit der Etablierung der **Weiterbildungsakademie** Österreich (wba) eine Institution, die einen maßgeblichen Beitrag zur Professionalisierung und Qualitätssicherung von ErwachsenenbildnerInnen leisten soll. Die wba bietet in der Erwachsenenbildung tätigen Personen erstmals die Möglichkeit, einen breit anerkannten beruflichen bzw. praxisbezogenen Abschluss mit Zertifikat und Diplom (2 Levels) zu erlangen. Bereits erworbene Kompetenzen werden in einem speziellen Verfahren anerkannt, fehlende Kompetenzen über Angebote in Bildungsinstitutionen erworben. Im Anschluss an die wba stehen weiterführende Ausbildungswege an Universitäten offen, in denen Kompetenzen der wba-Abschlüsse Anerkennung finden und damit das Studium verkürzen.

Die wba ist Teil des kooperativen Systems der österreichischen Erwachsenenbildung am Bundesinstitut für Erwachsenenbildung, dem die zehn Einrichtungen der Konferenz der Erwachsenenbildung Österreichs angehören. Das bifeb koordiniert als Rechtsträger die Zusammenarbeit (siehe <http://www.wba.or.at>).

#### **How and by who it is been measured?**

Erhebungen zur Teilnahme am lebenslangen Lernen werden von der Statistik Austria durchgeführt. Dazu zählen Labour Force Survey (LFS), Adult Education Survey (AES) und Continuing Vocational Training Survey (CVTS).

Aus dem Labour Force Survey (LFS) gibt es Informationen zu formalen und nicht-formalen Bildungsaktivitäten von Personen ab 15 Jahren in den letzten 4 Wochen vor der Befragung. LFS wird kontinuierlich vierteljährlich erhoben und aus diesen Erhebungen werden Informationen für die Bildung von Strukturindikatoren herangezogen, so auch die Strukturindikatoren „Lebenslanges Lernen (LLL)“ und „Early school leavers“. Auswahlrahmen für die Haushaltstichproben der kontinuierlichen Erhebungen ist das Zentrale Melderegister (ZMR).

Der Adult Education Survey (AES) liefert Daten zu formalen und nicht-formalen Bildungsaktivitäten sowie informellen Lernaktivitäten von 25- bis 64-Jährigen in den letzten 12 Monaten vor der Erhebung. In Österreich wurde der AES im Jahr 2007 durchgeführt und in Zukunft wird die Erhebung über Erwachsenenbildung regelmäßig alle fünf Jahre stattfinden. Die Erhebung wurde bei einer repräsentativen Stichprobe von 4.675 Personen im Alter von 25 bis 64 Jahren in Form von persönlichen Interviews durchgeführt.

Im Continuing Vocational Training Survey (CVTS) wird nach betriebliche Aus- und Weiterbildung gefragt und diese Erhebung wurde als schriftliche Unternehmensbefragung durchgeführt. Bei der letzten Erhebung wurden 3.435 österreichische Unternehmen ab zehn Beschäftigten aus dem Produzierenden Bereich sowie dem Dienstleistungssektor über ihre Bildungsaktivitäten des Jahres 2005 befragt.

#### **Is there a management information system for providers and how does it function?**

Es gibt kein übergreifendes Monitoringsystem für die Erwachsenenbildung. Ein bestehendes Monitoringsystem findet nur für Maßnahmen im Rahmen des Operationellen Programms Beschäftigung sowie für weitere nationaler Finanzierungen in diesem Schwerpunktbereich Anwendung.

Derzeit wird im Rahmen einer Arbeitsgruppe des BMUKK mit den Ländern an einem gemeinsamen Kofinanzierungsmodell für das kostenlose Nachholen von Basisbildung und Bildungsabschlüssen gearbeitet. Der Aufbau eines gemeinsamen Monitoringsystems für diesen Bereich ist vorgesehen.

#### **Is there any measurement on the quality of staff and providers?**

Förderungen des BMUKK für Einrichtungen der Erwachsenenbildung werden zunehmend an das Vorhandensein von Qualitätssicherungssystemen und systematischer Weiterbildung der Lehrenden geknüpft. Die Zertifizierung von Lehrenden an der WBA wird vom BMUKK finanziell unterstützt.

Eine Gesamtstrategie zur Sicherstellung von Qualitätsstandards in der Erwachsenenbildung befindet sich in Ausarbeitung. Die Überlegungen dazu gehen von einem Qualitätsrahmen für die österreichische Erwachsenenbildung (QUEB) aus, welches die transparente und bundeseinheitliche Darstellung der Qualitätsbemühungen der österreichischen Erwachsenenbildung auf Basis eines übergeordneten Anerkennungsverfahrens ermöglicht.

**Issues and trends - what are the gaps you identify and who are needed for a better monitoring of the sector?**

Die Datenbasis im Bereich der Erwachsenenbildung insgesamt ist mangelhaft und ist zu verbessern, um zielsichere Planungen und Wirkungsanalysen durchführen zu können.

Näheres zur Datenlage über die Teilnahme am lebenslangen Lernen siehe Ausführungen im Abschnitt 1.b.

**Conclusion - what lessons have been learned in your country in the context of this PLA that can be applicable to other European countries?**

Eine verbesserte Datenbasis, transparente und abgestimmte Förderstrukturen sowie entsprechende Monitoringsysteme stellen die Herausforderungen für die künftige Erwachsenenbildung dar.

## BULGARIA I

### Performance in relation to the benchmark on Participation in Lifelong Learning (25 – 64 years of age)

A survey on the education and training of adults has been prepared and conducted by the National Statistical Institute during the period November – December 2007, using a methodology, developed by Eurostat and implemented in all countries of the EU. The methodology has been adapted to our conditions. All requirements for implementation of the adopted definitions and classifications and for the accuracy of results have been met. The survey in this form and content has been conducted for the first time in Bulgaria, and in future will be conducted every 4-5 years. It is a sample survey, representative for the country.

According to the results, the participation level of population between 25-64 years of age in at least one of the forms of LLL is significantly increasing – from 16 % in 2003 to 48.5% in 2007. The most important factors, contributing to this increase are the general economic growth of the country, the changes in attitude and dispositions of employers and people in active working age toward education and training, the active measures of state authorities, the accession of Bulgaria to the EU and the implementation of a number of European programmes, comprising measures and educational activities. The level of participation of men in LLL is increasing at a higher rate - 35 per cent, whereas for women, the increase is 30 per cent. The level of participation of population in different age groups is also significantly increasing, being largest for young people between 25-34 years of age – with 35 per cent, and relatively lowest – among people between 55-64 years of age – with 24 per cent.

Most active participants in life-long learning among the population between 25-64 years of age, as measured in 2007, were persons with university education, among which 71.1% have participated in some form of education and training for the 12-month period before the survey. Every second person with secondary education has also participated, whereas among persons with primary and lower education, the activity is lowest - 23.2%. Consequently, the level of acquired education appears as an important factor, which presupposes and additionally motivates people for more active participation in education and/or training.

Employed persons participate in different forms of LLL much more actively (62.1%), in comparison to persons, considered to be unemployed (19.9 %) and the economically inactive (18.6%).

Residence also influences participation in different forms of LLL – the level of participation of people, living in towns - 52.2% is much higher than the level of people, living in villages - 38.0%.

By 2013, the Republic of Bulgaria will strive to achieve the following objectives in the field of lifelong learning:

	2007 (basic value)	2013 (objective)
Level of participation of population between 25-64 years of age in life-long learning	1,3%	5%
Share of early leavers of the educational system	16,6%	12%
Share of persons between 20-24 years of age, with acquired secondary education	83,3%	85%

### Performance in relation to the benchmark on early school leavers

According to a survey of EUROSTAT LFS- Spring the indicator “Early school leavers“(the highest level of education or training they have attained is ISCED 0, 1, 2 or 3c short and they have not received any education or training in the four weeks preceding the survey) is 16.6%, whereas the value of this indicator for 2003 has been 22.4 % of the whole population between 18-24 years of age. During the period 2003-2007, a lasting tendency has been observed towards a decrease of the number of “early school leavers” in Bulgaria.

#### **Performance in relation to the benchmark on low achievers in reading**

The data based on the OECD PISA survey for the Percentage of pupils with reading, maths and science literacy - level 1 and lower on the PISA scale, 2006 for Bulgaria is at average 49%.

#### **Which are the policy measures taken to increase/decrease these 3 benchmarks, to improve the quality of adult learning staff and investment?**

The National Strategy for Life-Long Learning (LLL), adopted by the Council of Ministers in 2008 for the period 2008 – 2013 envisages the following guidelines for development:

- Broadening of the opportunities for acquisition of educational degree and a vocational qualification degree for people of any age;
- Creation of opportunities for the acquisition of key competences, aimed at the personal and vocational development and the building of active citizenship;
- Broadening of the possibilities for life-long learning for all groups of the population, both for persons with low level of education and without qualification, in order to increase their employability, and for the highly-educated and highly-qualified specialists, which contribute to the development of the country and the competitiveness of economy;
- Socially responsible involvement of businesses (employers) in the context of life-long learning, as a manifestation of contemporary corporate culture;
- Transforming guidance and consultation into a main element of life-long learning for adults;
- Regulating new forms and opportunities for participation of adults in LLL.

In order to increase the participation in life-long learning, specific actions will be taken for:

- Identification of the training needs of adults and development of strategies to satisfy these needs (term – by 2013);
- Identification of specific groups with low level of education and without qualification, in order to include them in different forms of learning. To provide an alternative educational programmes for early school leavers: programmes, aimed mainly at social integration and inclusion on the labour market, literacy courses, motivation, “second chance” schools (term – by 2011);
- Improvement of the institutional framework for LLL through broadening of the possibilities for learning in clubs, libraries, reading-rooms, youth information and consultation centers, regional and local community centers. Creation of opportunities for learning in the family as an instrument for integration in the process of LLL; motivating families to learn through the creation of community learning centres, open for members of the whole family (term – by 2013);
- Development of programmes and projects, tailored to the specific training needs of people with disabilities (term – by 2011);
- Development of programmes/projects for acquisition of key competences, necessary for improving the employability and competitiveness on the labour market (term – by 2011);
- Increasing of the opportunities for learning at the workplace, by placing special emphasis on the opening of

more places for internship and apprenticeship in enterprises in all sectors of the economy (term – by 2011);

- Encouragement of employers to invest in the forming of new vocational skills, necessary for adaptation to the changes in technological development and the requirements at the workplace (term – by 2013);
- Creation of mechanisms for sharing the financial responsibility for training between employers, state institutions, municipalities and trainees (term – by 2013);
- Improvement of learning programmes and methods of teaching, to gear them to former learning and the experience of learners; encouragement for the improvement of the qualification of trainers of adult people, development of diverse forms of learning – distance learning, e-learning, combined learning (face-to-face learning and performance of individual tasks) (term – by 2013);
- Development of instruments for recognition of former learning, and validation and certification of outcomes of informal and individual learning (term – by 2013);
- Changes in legislation, related to the creation of flexible opportunities for re-entry and mobility in the educational system and on the labour market, with control and monitoring over the system (term – by 2013).

#### **How and by who it is been measured?**

National Statistical Institute, Ministry of Education and Science, Ministry of Labour and Social Policy.

#### **Is there a management information system for providers and how does it function?**

The National Agency for Vocational Education and Training (NAVET), jointly with the Employment Agency (NEA) introduced a pilot model of IIS – Inter-institutional Information System for collecting, storing, processing and provision of data and information on the demand and supply of vocational education and vocational guidance at local, regional, and national level for all stakeholders and institutions, depending on their level of access. The information system provides:

- Transparency at all stages of the monitored processes in order to support a better quality of managerial and political decision-making.
- Providing of information for better control over the quality of adult vocational training performed.
- Improving of the socio-economical consequences of training and improvement of qualification and guidance of the work-force.
- Creation of informational basis for analysis of the processes of vocational training and vocational guidance.
- Creation of conditions for the issuing of “Qualification Portfolio” of trainees.

The public part of the IIS submits information to employers, employees and candidates for training, as well as to other interested institutions and persons on the labour market and on the market of training and guidance services.

The model is still experimental. It provides inter-system communication and a security system for the access to and between the IIS and other information systems. This is a system of relational databases for collecting, storing, processing and dissemination of data and analytical information – data on training institutions, trainers, trainees, offered forms of training, results of the control activity performed, generation of inquiries, a search mechanism, etc.

User friendly interface.

Open code software - FreeBSD, PostgreSQL, AJAX, Furia.

The technical capabilities for expansion and development are practically limitless. The process of expansion and

development depends on the financial resources available, the political acceptability, and the interests of social partners, of individual employers and of candidates for training.

**Is there any measurement on the quality of staff and providers?**

The quality of education and training for the whole system is ensured by SES – State Educational Standards. In vocational education and training, these are being developed at national level with the participation of social partners and employers' representatives from the respective sectors of the economy.

In compliance with the requirements of the Law on Vocational Education and Training (LVET), the licenses for vocational training and for vocational guidance of adults are being issued by NAVET. The quality of vocational training in the centers for vocational training (CVT) is ensured by NAVET, which monitors the keeping of requirements in the licensing of training institutions.

## BULGARIA II

The challenges that countries in Europe have been facing over the last decade, like the increase in the number of unqualified workers and the growth of the ageing population, set new tasks in the educational spheres. Professional training and education play a key role in this process, being the sector which provides knowledge and skills needed for the labour market.

### Teachers

The National Programme named 'Qualification' started in January 2008 with 1150 teachers who began their re-trainee course in order to obtain a certificate for teaching foreign languages. The following courses have been carried out to promote teachers qualification in

- Spanish -200 teachers
- Russian- 100 teachers
- French -60 teachers

The educational programme was implemented with the co-operation of the embassies of Spain, France and Russia.

Key competence qualification courses were organized and 226017 teachers participated in them.

1151 teachers from the professional training sector in education underwent different qualification forms /new technologies, interactive methods of teaching, entrepreneur skills, and profession in foreign language, etc/

Some groups of teachers have been treated with special consideration, such as 420 teachers of disabled children; 35 teachers have obtained Master degree in The South-West University 'N. Rilski'.

60 teachers entered a three-module course /'Family engaged', 'Learn without prejudice', 'Organization of a positive classroom'/ and consequently trained themselves another 300 teachers /peer learning/.

### Early school leaving

There is a downward trend in the percentage of early school leavers:

- 2006/2007: 21, 4% which account for 19639 students / out of 917067 students in general/
- 2007/2008: 17.5% which account for 14457 students /out of 825702 students in general/

The trend is for a biggest number of failed students from the junior high school program /V – VIII/ grades for the period between 2006 – 2007 – 8733 students and for the next period between 2007 – 2008 – 6456 students.

The number of failed students from the elementary school is decreasing:

- I – IV grades 2006 – 2007 – 5361students
- 2007 – 2008 – 3570 students

A reform in the professional education started during 1997 in Bulgaria. It continues at the moment. The purpose is the education to get closer to the needs of labour market.

A lot of projects brought a good effect. Instead of this it is necessary to be fully completed many activities in connection with the latest needs of labour market.

The main aim of the Longlife Learning program is through a reinforce of the exchange and the co-operation ship in the community to achieve a high quality.

For the purpose of the execution of the Operational program for Development Human Resources during February'09 started a new operation/activity of Ministry of Labour and social policy for 50million leva – “Secure of conditions for people 50+ age and unemployed for a long period with the main aim to increase their possibilities for work “

The main purpose is to increase the competitive skills of those persons and to prolong their active work.

To support the European initiatives we have to accelerate the investigation in the field of education and training, to work with the young people further to acquire essential competences, as we pay special attention to the education abroad.

The new 2009 is the European year of the creative work and innovations. These are important elements for the success of the European Commission. Further to that, what should be done to increase the awareness of the society is to:

- Distribute information for the European year 2009.
- Encourage the creativity and the capacity of the innovations.
- Stimulate the research activity.

## CYPRUS

Cyprus generally has a comprehensive educational and training system, offering extensive opportunities for the acquisition of knowledge and skills. In recognition of the crucial role of education and training for the future course of the Cyprus economy, the Government is promoting major reforms at the upper secondary cycle of the educational system, including the technical and vocational schooling. In this context, there is a systematic effort to develop a better balance between basic areas of learning and new technological developments related to the shift towards a knowledge-based economy and the needs of the labour market. Continuing education and training as part of a coherent system of lifelong learning is a key factor for maintaining a highly skilled and adaptable workforce and improving employability. A system of continuing education and training is well established in Cyprus with significant progress, depicted both in basic benchmarks set by the European Union as well as in concrete progress in the implementation of relevant measures, the assessment of which is currently under way for 2008.

### **Performance in relation to the benchmark on Participation in Lifelong Learning (25 – 64 years of age)**

In relation to the participation of adults in lifelong learning, the overall participation rate for persons aged 25-64, has increased from 5,9 % in 2005, when the National Reform Programme (NRP) was implemented, to 7,1 % in 2006 and to 8,4 % in 2007, decreasing the gap with the EU 27 ratio which was 9,7 % in 2007, but it is still lower than the European Employment Strategy (EES) target of 12,5 % by 2010, while the overall educational (higher education) level of the population of Cyprus aged 15-64 was 29,7 % in 2007 being considerably higher than the EU average of 20,6 %.

### **Performance in relation to the benchmark on early school leavers**

In relation to early school leavers, the ratio decreased from 18,2 % in 2005 to 16% in 2006 and dropped down to 12,6 %, being lower than the EU 27 average of 14,8% in 2007, but it is higher than the European Employment Strategy (EES) target of 10 % by 2010. It is important to note that Cyprus does not agree with the statistics provided by Eurostat concerning this particular benchmark and has officially informed the European Commission on the matter, since a number of factors have not been taken into consideration when collecting data.

### **Performance in relation to the benchmark on low achievers in reading**

In relation to low achievers in reading Cyprus has not participated in the PISA survey conducted by OECD due to restrictions imposed by Turkey therefore, there are no comparable statistics at present. Nevertheless, education in Cyprus is compulsory up to the age of 15 and free up to the age of 18 with 98,1 % of the graduates of compulsory education (86, 1% of secondary general and 12 % in technical/vocational education) continuing their studies to upper secondary education . In addition, about 82 % of upper secondary education graduates continue their studies in tertiary education (37 % in Cyprus and 45 % abroad) while the net participation rate in education for young people of 12-18 years old is estimated at 95 % (Statistics of Education, 2006/2007). Evidently, the high percentage of upper secondary as well as tertiary education attainment by young learners proves that the ratio of low achievers in reading in Cyprus should be very low, taking into consideration that the only data available is 3 % for 2001 (Statistics of Education, 2003/2004), considerably lower than the EU 27 average of 24,1 % in 2006 and even lower than the European Employment Strategy (EES) target of 20 % by 2010.

**Which are the policy measures taken to increase/decrease these 3 benchmarks, to improve the quality of adult learning staff and investment?**

The government of Cyprus has set a number of priorities for actions and policy developments within the framework of the Lifelong Learning Strategy (2007-2013) and continues with vigor all measures promoting more and better employment as well as more actions to enhance lifelong learning which include addressing the needs of the society for civil education, social cohesion, active citizenship, entrepreneurship, the needs of children and young people for education and counseling, the needs of young adults for training in order to enter the work force, the needs of unemployed adults for retraining, the needs of the labour market in general as well as improving the quality of adult learning staff and investment.

In relation to the participation of adults in lifelong learning a number of new measures have been introduced since 2007. The National Lifelong Learning (LLL) Strategy was approved on 7th November 2007 and a monitoring Mechanism (National Lifelong Learning Committee and Technical Lifelong Learning Committee) have been appointed to monitor its implementation, while the assessment of the progress made during the first year of implementation is under way. In addition, the Foundation for the Management of European Lifelong Learning Programmes has been adequately staffed and with a budget of more than half a million euros is managing the integrated EU Lifelong Learning programmes such as Erasmus, Leonardo Da Vinci and Comenius and contributes to increasing employment and training opportunities for young people by facilitating their participation in various European programmes. Furthermore, the Education and Vocational Reform continues with the implementation of numerous measures the majority of which is directed towards strengthening the quality and attractiveness of Secondary Technical and Vocational Education (STVE) to young learners, which at present is quite low (12 % of the graduates of compulsory education), particularly for girls who comprise only 14,8 % of the total population in the technical and vocational schools.

A National Qualifications Framework was submitted by the Ministry of Education and Culture to the Council of Ministers and it was approved by the end of 2008, while a number of actions have to be taken for its implementation. Moreover, in combination with the upgrading of the Apprenticeship Scheme, the New Modern Apprenticeship Scheme was established in November 2007 and began its operation by the end of 2008 under the administration of the Cyprus Productivity Center (CPC) of the Ministry of Labour and Social Insurance, designed to constitute a viable, alternative form of training and development for young learners aged 14-25 in order to meet the needs of the labour market. In addition, the upgrading of the Human Resource Development Authority (HRDA) training deals with the extension of the rendered training programmes, further support to the training infrastructure of institutions and enterprises entitled Training Infrastructure Support Scheme, which became accessible and effective since January 2009, the introduction of an Assessment and Certification System of Training Providers and the introduction of a Vocational Qualifications System. Moreover, new faculties have been added to the University of Cyprus, two newly state universities have been established and began to operate in September 2007, the Technical University of Cyprus and the Open University of Cyprus respectively, a state Medical School has been established, as well as three new private Universities, while for the school year 2008-2009 they have all increased both their intake as well as the number of programmes offered, thus increasing the chances of young learners for higher education attainment in Cyprus.

Finally, additional measures to address progress towards this benchmark is the extension of the scope of the programmes provided by the Adult Education Centres in order to enhance active citizenship, civic education, as well as to build occupational skills mainly in languages and computer literacy which is currently under discussion in conjunction with the economy oriented aspect of adult education through the upgrading of skills and competences of adults at work and the provision of training opportunities in basic skills and entrepreneurship for economically inactive adults in order to facilitate their entry into the labour market and reduce the risk of social inclusion.

In relation to early school leavers and in order to improve this benchmark several preventive as well as corrective

measures have been introduced since 2007. The compulsory pre-primary education (70,4 % in 2007) contributes to the cultivation of a learning culture to stay in school, while the special education programme which operates within the school system of Cyprus, offers more opportunities to young learners to overcome their learning difficulties along with school psychologists, who provide them support, through special programmes, in order to improve their attitude towards school and learning aiming at preventing their frustration and withdrawal from the school system. In addition, the Counseling and Career Education Service of the Ministry of Education and Culture through personal, group and family counseling, the teaching of subjects relevant to Career and Social Education, the organization and implementation of special seminars addressed to both students and their parents, the participation in different committees on the development and implementation of prevention programmes, the use of psychometric tests devices and the publication of supportive material, helps young learners in general as well as those at risk to develop the necessary skills which will enable them to deal with their problems more effectively and thus, keep them within the school system until the completion of upper secondary education.

Moreover, the operation of Second Chance Schools in all main towns of Cyprus offer the opportunity to those who are considered early leavers to re-enter the school system, in order to obtain those qualifications necessary for entering higher education while all tertiary education students receive state allowance as a motive for entering tertiary education. Furthermore, the redesigning of the apprenticeship system in order to offer young learners an alternative form of training, contributes to their personal development and at the same time enables them to meet the needs of the labour market.

In relation to low achievers in reading it has already been mentioned that the ratio should be very low in Cyprus, taking into consideration the only data available of 3 % for 2001 (Statistics of Education, 2003/2004). Nevertheless, supportive measures for low achievers in reading are taken in both primary education, through courses provided to young learners by the Adult Education Centres, and lower secondary education through a functional literacy programme.

In relation to improving the quality of adult learning staff a number of measures have been adopted in order to enable them to cope with their changing roles in a lifelong knowledge-based society. The University of Cyprus is responsible for organizing a special pre-service training programme for lower and upper secondary education teachers in order to facilitate their integration in the public educational system, while the Pedagogical Institute of Cyprus is responsible for a policy implementation on all teachers' training aiming at their professional development through compulsory and optional in-service training programmes based on their needs which are identified each year by the Ministry of Education and Culture, which enable them to integrate in their teaching practices the promotion of reflecting learning techniques, autonomous learning and the multicultural as well as the European dimension.

Furthermore, the Pedagogical Institute of Cyprus implemented an action aiming at ensuring that primary and lower and upper secondary education teachers will become digitally literate, partly co-financed by the ESF, covering a percentage of 85 % in relation to in-service training in basic computer skills or the use of ICT in classroom and 80 % in relation to the acquisition of certification based on ECDL (European Computer Driving License) respectively, while a number of teachers have attended a special teacher training programme on ICT and e-learning. In addition, the Pedagogical Institute of Cyprus has introduced the European Credit Transfer System (ECTS) in order to give provide accreditation to skills and knowledge acquired by teachers.

**How and by who it is been measured? Is there any measurement on the quality of staff and providers?**

The quality of adult learning investment in Cyprus is measured through the Monitoring Mechanism for the implementation of the National Lifelong Learning (LLL) Strategy. It involves the National Lifelong Learning

Committee in close cooperation with the Technical Lifelong Learning Committee created to support the former, which were designated by the Council of Ministers in order to monitor, coordinate and promote all necessary actions for the realization of the National Lifelong Learning Strategy, as well as the preparation of the Annual National Lifelong Learning Strategy Progress Report. The Technical Lifelong Learning Committee is currently monitoring the actual lifelong measures being promoted by the several competent authorities for the realization of the strategic objectives under the four priority axes of the Cyprus National Strategy for Lifelong Learning (CyLLS) 2007-2013, namely promoting access and participation in lifelong learning, strengthening of lifelong learning infrastructure and systems, promoting research and development for the support of lifelong learning and governing effectively the lifelong learning sector. The monitoring process is based on national provisions and requirements focusing on research as well as on reporting made on the progress of the implementation of the National Lifelong Learning (LLL) strategy and the relevant measures promoted by all stakeholders on a regular basis and upon demand of the Technical Lifelong Learning Committee. In addition, research and various development activities are promoted through the University of Cyprus, the Technical University of Cyprus and the Open University of Cyprus in an effort to provide valid and adequate information on the progress made in relation to lifelong learning policies and practices as well as on the quality of adult learning staff and providers. Furthermore, the establishment of the Centre for Educational Research and Evaluation and its involvement in national as well as international surveys (e.g. PIAAC) enables the organization to identify trends and projections of lifelong learning needs which in cooperation with the Technical Lifelong Learning Committee provide a comprehensive and coherent framework for better monitoring lifelong learning and the adult learning sector in particular, and for inventing new and more effective ways of improving the quality of adult learning investment in relation to learners, learning staff and providers.

#### **Is there a management information system for providers and how does it function?**

In February 2009, representatives from the Ministries of Education and Culture, Labour and Social Insurance, Finance and the Planning Bureau, which are responsible for the monitoring of the National Lifelong Learning (LLL) Strategy being part of the Technical Lifelong Learning Committee, have decided that the management information system of the adult learning sector should be further developed through active participation and involvement of all stakeholders. Within this framework, they have decided on frequent collection of data on the progress made on adult learning through research and reporting initiatives which will be designed in such ways which will provide appropriate responses to labour market needs and will enhance social cohesion through investment in the human capital of Cyprus. This network of acquiring, processing and exchanging data relevant to adult learning will enable all stakeholders to understand better and work harder on further developing the sector as well as face any obstacles in the process of achieving national priorities and European Union benchmarks.

#### **Issues and trends - what are the gaps you identify and who are needed for a better monitoring of the sector?**

The picture emerging is that education in Cyprus is strong in many fronts, yet there is room for improvement, especially in terms of facilitating access to initial vocational secondary and higher education and increasing the attractiveness of technical and vocational education and the apprenticeship scheme. Furthermore, additional efforts are required to increase the participation of adults in training and lifelong learning, aiming at achieving full employment, improving quality and productivity at work, and strengthening social and territorial cohesion. In addressing these objectives, in the period 2008-2010, actions will be focused on maintaining high rates of increase of labour supply, particularly by raising old-aged and female participation rates and reducing gender inequality, increasing the flexibility and security in the labour market, managing economic migration issues to serve the economic and social needs of Cyprus, further developing human capital and enhancing the conditions of social cohesion. The members of the Technical Lifelong Learning Committee should collaborate closely with all stakeholders and social partners in the adult learning sector, if progress should be made and reported through

the implementation of both adult learning national and European policies.

**Conclusion - what lessons have been learned in your country in the context of this PLA that can be applicable to other European countries?**

Adult learning monitoring is an issue of great importance in Cyprus which requires the collaborative effort of all stakeholders involved in order to successfully implement national policies and attain the European Union's benchmarks in making progress towards the Lisbon objectives 2010 in education and training. All stakeholders realize as well that something more than closer collaboration is needed if the adult learning sector in Cyprus and lifelong learning in general are to be made comparable to EU 27. This is consistency, not only in terms of implementing policies but in obtaining valid and comparable data in relation to adult learners' participation in various bands of lifelong learning.

Therefore, a uniform model of adult learning monitoring at European level should be established in order to obtain the kind of data which will provide important responses to labour market needs and to the society in relation to developing social capital and enhancing social inclusion as well as cohesion. Evidently, cooperation in adult learning monitoring should be further developed between European countries in order to increase the validity of the data obtained and develop closer relationships between them in terms of using these data in establishing and implementing new European policies to benefit all European citizens.

## CZECH REPUBLIC

### Performance in relation to the benchmark on Participation in Lifelong Learning (25 – 64 years of age)

The key indicator for the sector of further education is currently the rate of the participation of the adult population in this type of education. At present time, in comparison with other EU member states, the situation in the Czech Republic is not entirely satisfactory.

	2002	2003	2004	2005	2006	2007
<b>EU (27)</b>	7.2	8.5	9.3	9.7	9.6	9.7
<b>Czech Republic</b>	5.6	5.1	5.8	5.6	5.6	5.7

Reasons why people do not participate in further education are most often related to their attitudes and motivations. The most significant reasons [not to participate] are given as follows: feeling that the attained education is sufficient, or potentially will not bring about the desired benefits, high financial cost, and lack of time. Factor analyses discovered that the people who do not actively pursue education could be divided into two main groups: people who would pursue further education but who for the reasons of “real barriers” (of external nature, or related to what is on offer) do not realize such interests; and people who are not interested in further education due to their own attitudes or personal circumstances.

One of the possibilities how to increase participation would be financial aid. At present time it is impossible to provide the participants in the requalification courses realized and financed through the active employment policies with support services in the necessary scope. The exceptions include the travel cost, accommodation and the board for the course participants, or potentially accompanying persons, who could be reimbursed to the participants by the labour office as costs related with the requalification. More room in this respect is provided by projects realized and financed under the ESF. Experience from these projects must however be analyzed first and to propose systemic measures on how to interconnect the support services with the educational activities in order to ensure their function even after the financing from the structural funds runs out.

At present time a team of experts is in the process of completion of the Implementation Plan for the Lifelong Learning Strategy in the Czech Republic and the issues of learner motivation are one of the themes which this document will address. Currently, no other results of any particular surveys in this filed are available.

### Performance in relation to the benchmark on early school leavers

The EU’s benchmark, no more than 10 % **early school-leavers**, is at the moment achieved by the Czech Republic and Poland only.

	2000	2007
<b>EU (27)</b>	17.6	14.8
<b>Czech Republic</b>	5.5	5.5

### Performance in relation to the benchmark on low achievers in reading

The Czech Republic is unfortunately showing decreasing tendency in this field. EU benchmark for 2010 is 17.0%, which is not really satisfactory at the moment.

	2000	2007
EU (27)	21.3	24.1
Czech Republic	17.5	24.8

**How and by who it is been measured?**

By the Ministry of Education with the help of organisations closely related to the Ministry of Education.

Further education is not centralized in the Czech Republic and there are a number of institutions in the Czech Republic which provide courses to adults.

**Is there a management information system for providers and how does it function?**

There is no such informational system working in the field of adult education in the Czech Republic at the moment.

**Is there any measurement on the quality of staff and providers?**

In the area of further education there exists no mechanism which would ensure quality, save for the accreditation procedure for the requalification programs.

Ensuring the quality should be based in the combination of external evaluation and self-evaluation and on the combination of the formal procedures and informal (experience-based) methods of quality management.

Formal procedures (certification of the knowledge of individuals, accreditation of institutions and programs) are oriented to risks and their prevention. They only attest that the particular components meet the requirements defined in a certain norm in the form of a minimum standard. They however do not attest the achievement of a high or specific quality that is necessary in concrete situations. To improve the quality of these procedures means to ascertain especially the quality and relevancy of the various norms, input and output standards and definition of clear and verifiable objectives. For these reason it is immensely important that the interested parties on the national, regional or local level (according to the nature of such norm) agree on the particular objectives. Only so it can be prevented that standards with conflicting objectives are pushed ahead (such as the concept of the state exams [maturita]). Formal procedures are missing especially in reference to further education; their constitution should be linked to the National Qualification System which should play the role of the common output standard.

Decentralized management and support to the establishment of the educational programs which are tailored to local needs legitimately lead to the increased necessity to monitor the entire system with regard to the promulgated objectives. Important role is played by the comparative international reviews which provide a valuable feedback with respect to the level of the development of the individual aspects of the lifelong learning in the Czech Republic. While the field of initial education is being monitored in a satisfactory manner, further education sorely needs a monitoring system to be yet established.

A significant role in terms of public control is fulfilled also by the informal methods of quality management (such as references). To these ends, it is necessary to promote various forms of informal initiatives which would evaluate the entire spectrum of lifelong learning and its various components from various points of view, and

which would bring their users information and decisive criteria and which would contribute to the “culture of quality” generally. A significant role in this respect could be played by the social partners, especially the representatives of the employers, companies or labour offices.

Assessing learning outcomes is crucial for any educational undertaking. Measuring the outcomes of adult education is, however, complex as outcomes relate to a wide range of aspects such as personal development, socio-economic and cultural factors and involves both competences and attitudes. For this reason this section should cover a comprehensive monitoring and evaluation perspective taking into account the programmatic and individual level.

**Issues and trends - what are the gaps you identify and who are needed for a better monitoring of the sector?**

At the moment we are waiting for the results of the Adult Education Survey (AES) which is organized by Eurostat and in the Czech Republic realized by the Czech Statistical Bureau. The results are currently being processed and will be available to the public in the mid 2009. With the same expectation we look for the realisation of PIAAC survey.

We would like to see some survey regarding “Attainment in adult education concerning low skilled”

**Conclusion - what lessons have been learned in your country in the context of this PLA that can be applicable to other European countries?**

It is obvious, regardless of the data coming from statistical surveys, that the Czech Republic is in the field of adult education only at the starting line and thus any confrontation and possible cooperation with other countries in the EU is entirely desirable. Comparison of the situation in other countries is fundamental in order to achieve any improvement of the sector in the Czech Republic.

## FRANCE

### Participation in Lifelong Learning (25 – 64 years of age)

#### 1.1. Eléments de contexte :

Cet indicateur, basé sur la labour force survey, fournit des données annuelles sur le pourcentage de la population âgée de 25 à 64 ans qui a participé à une formation dans les quatre semaines précédant l'enquête. L'objectif est d'atteindre le niveau de 12,5% en 2010 au niveau européen, la moyenne des 27 pays de l'UE étant de 7,2% en 2007. Pour ce qui concerne la France,, cette participation s'établit à 7,4% en 2007.

#### 1.2. Politiques mises en oeuvre dans le domaine de la formation des adultes :

En conséquence des différentes lois de décentralisation, les régions ont désormais la compétence principale dans le domaine de la formation professionnelle continue, l'Etat ne restant compétent que pour la formation de certains publics spécifiques (travailleurs étrangers, illettrés, détenus, travailleurs handicapés...). Le pilotage de la formation est donc défini au plus près des besoins des publics et des bassins d'emploi et permet de répondre plus efficacement aux besoins du marché du travail et à la variété des profils. A cette fin, la région élabore un « plan régional de développement des formations professionnelles », qui vise à favoriser un développement cohérent des actions de formation professionnelle initiale et continue des jeunes et des adultes. Ce plan régional est élaboré en concertation avec l'Etat et les partenaires sociaux.

Par ailleurs, les partenaires sociaux jouent un rôle important dans ce domaine (participation au comité d'entreprise, définition des priorités au sein des organismes paritaires de branche, participation au conseil national de la formation professionnelle tout au long de la vie...).

Le système de formation professionnelle continue, tel qu'il s'est développé en France, est organisé par statuts (salariés ou demandeurs d'emploi). C'est pourquoi il faut décrire les différents leviers d'action permettant de favoriser la formation des adultes en fonction de leur statut :

#### Les demandeurs d'emploi :

La formation professionnelle des demandeurs d'emploi est sous la responsabilité de trois acteurs : l'Etat, les régions et Pole emploi (institution principale du service public de l'emploi, anciennement ANPE et ASSEDIC).

Les demandeurs d'emploi peuvent ainsi bénéficier d'actions de formation dans le cadre du « projet personnalisé d'accès à l'emploi ». Ces formations permettent de faciliter leur retour à l'emploi, le contenu et la durée étant définis en fonction de la situation personnelle particulière de l'individu et de sa distance par rapport à l'emploi. Il s'agit le plus souvent de formations permettant d'obtenir une qualification ou d'accéder à un emploi dans un secteur en tension. La majorité d'entre elles sont financées par les conseils régionaux.

Outre le coût pédagogique de certaines formations et la rémunération des stagiaires, les financeurs peuvent apporter des aides destinées à faciliter l'entrée et le maintien en formation (transport, garde d'enfants pour parents isolés, etc...).

En 2006, 632 000 demandeurs d'emploi sont entrés en formation.

#### Les salariés :

L'accès à la formation des salariés du secteur privé est réglementé depuis 1971 (une loi de 1971 a transposé un accord national interprofessionnel relatif à la formation professionnelle signé par les partenaires sociaux). 5

millions de salariés ont participé à une action de formation en 2007, pour une durée de moyenne de 40 heures.

Les entreprises ont une obligation légale minimale en matière de financement de la formation continue, qui s'élève à 1,6% de la masse salariale. Beaucoup d'entreprises considèrent la formation continue comme un investissement et y consacrent une part bien plus importante. Le budget alloué à la formation professionnelle en 2007 par les entreprises s'est ainsi élevé à 11,2 milliards d'euros.

Dans ce cadre, il existe 3 voies d'accès à la formation professionnelle continue :

- à l'initiative de l'employeur, dans le cadre du « plan de formation » qui traduit les priorités définies par l'employeur;
- à l'initiative du salarié, dans le cadre de l'un des congés de formation<sup>1</sup> – congés individuel de formation<sup>2</sup>, congés de validation des acquis de l'expérience et congés de bilan de compétence<sup>3</sup> ;
- à l'initiative du salarié ou de l'employeur, dans le cadre du droit individuel à la formation<sup>4</sup> ou de la période de professionnalisation.

Ainsi, l'offre de formation disponible permet de faciliter l'accès à la formation, y compris des salariés les plus âgés. Certains des dispositifs existants leur sont tout particulièrement dédiés. Par exemple, la période de professionnalisation, qui a pour objet de favoriser par des actions de formation en alternance le maintien en activité des salariés en situation de fragilité à l'égard de l'emploi, concerne tout particulièrement les salariés de plus de 45 ans. De même, le contrat de professionnalisation, qui est un contrat en alternance permettant d'acquérir une qualification professionnelle, est tout destiné aux demandeurs d'emploi de plus de 26 ans, et prévoit en outre des incitations financières lorsqu'un tel contrat est conclu avec une personne de plus de 45 ans. Toujours afin d'inciter les adultes à améliorer leur niveau de qualification, la validation des acquis de l'expérience permet de valoriser les compétences professionnelles que le salarié a pu développer au cours de la première partie de sa carrière. Enfin, et en vue de mobiliser utilement les dispositifs existants, le bilan de compétences, qui est ouvert aux salariés justifiant de 5 ans d'ancienneté permet de faire le point en vue de définir un projet professionnel pour la seconde partie de carrière, etc...

Par ailleurs, au-delà des dispositifs prévus par la loi, des priorités relatives à certains publics salariés peuvent être déclinés par les branches professionnelles, en particulier depuis le lancement du plan national d'action concertée pour l'emploi des seniors 2006-2010, qui initie une logique de gestion prévisionnelle des emplois et des compétences en vue d'encourager des démarches concernant tous les âges.

#### - adultes et l'illettrisme (tous statuts) :

La population française concernée par cette problématique est particulièrement importante. En effet, 1,8 million d'adultes occupent un emploi et se trouve en situation d'illettrisme (Insee, enquête IVQ 2006)

Le ministère de l'emploi développe une politique volontariste en direction des actifs illettrés. Son intervention

<sup>1</sup> Le CIF permet de suivre des actions de formation qui peuvent durer jusqu'à un an (ou à 1 200 heures). Tout salarié peut accéder à ce congé dès qu'il a acquis 24 mois d'ancienneté, dont 12 mois dans l'entreprise.

<sup>2</sup> Ce congé permet au salarié de s'absenter pour participer aux épreuves de validation des acquis de l'expérience, ou être accompagné dans la procédure de préparation de cette validation. Ce congé peut durer jusqu'à 24 heures..

<sup>3</sup> Ce congé permet à un salarié d'analyser ses compétences professionnelles et personnelles en vue d'établir un projet professionnel ou de formation. Il peut durer jusqu'à 24 heures.

<sup>4</sup> Le droit individuel à la formation permet à chaque salarié, quel que soit son âge, de bénéficier, à son initiative, d'une formation de vingt heures chaque année, ou de cumuler ce droit jusqu'à 120 heures de formation sur six ans.

s'appuie sur le programme compétences clefs<sup>1</sup> afin de favoriser l'accès à la formation professionnelle des personnes ne maîtrisant pas un socle minimal de compétences nécessaires à leur insertion ou à leur maintien dans l'emploi.

Pour ce qui concerne le ministère de l'Éducation nationale, ses opérateurs de formation continue des adultes mettent en place des actions de formation portant sur les savoirs de base (apprentissage de base en français, en calcul, en lecture et écriture), le français langue étrangère et des actions d'alphabétisation.

#### Mesure et suivi de la qualité des prestataires de formation :

S'agissant de la formation des adultes, les organismes de formation évoluent dans un contexte de liberté d'établissement qui rend difficile un tel suivi. Pour autant, l'État s'attache à améliorer la qualité de la formation en soutenant des initiatives telles que celle de l'office professionnel de qualification des organismes de formation (OPQF), qui peut délivrer une qualification certifiant la qualité des équipes de formation. Cette qualification est basée sur des attestations de tiers, les curriculum vitae des formateurs et l'ancienneté de l'organisme (au moins 2 ans). En outre, dans le cadre de la réforme en cours de la formation professionnelle, le gouvernement français souhaite promouvoir les démarches qualité sous diverses formes en développant notamment la visibilité pour les acheteurs et les individus des certifications et labels détenus par les formations et les organismes de formation.

#### 1.2. Éléments sur le calcul de cet indicateur en France :

L'indicateur est calculé par Eurostat sur la base des enquêtes Labour Force Survey (enquête Emploi réalisée par l'INSEE pour la France), dont la déclinaison nationale des enquêtes LFS est l'enquête « Emploi ». Il mesure la participation des adultes de 25 à 64 ans à des enseignements ou formations dits « formels » (c'est-à-dire débouchant sur un diplôme ou un titre reconnu), ainsi que la participation à des cours, séminaires, conférences ou ateliers « non formels », c'est à dire organisés avec des formateurs ou moniteurs, mais sans niveau hiérarchisable, quel qu'en soit le but - professionnel, développement personnel...). A noter que les enseignements ou formations dits « informels », correspondant à une activité intentionnelle mais peu structurée pouvant inclure par exemple des événements se déroulant dans le cercle familial, sur le lieu de travail ou dans la vie quotidienne, le critère de distinction avec les deux autres catégories étant l'absence « d'institutionnalisation » de l'activité, ne sont pas pris en compte dans cette enquête. La valeur de l'indicateur est de 7,4 % en 2007, l'objectif à atteindre en 2010 étant de 12,5 %.

#### Système national de collecte des données :

Il n'existe pas de système centralisé de remontée des données, néanmoins, le traitement statistique des données provenant de sources administratives ou, plus rarement d'enquêtes, permet d'établir quelques résultats sur le rôle des différents acteurs en matière de formation (État, entreprises et partenaires sociaux, Régions) :

- les sources provenant des financeurs permettent de recueillir des données agrégées, essentiellement financières (états statistiques et financiers des Organismes Paritaires Collecteurs Agréés qui recueillent les fonds des entreprises pour la formation des salariés, enquête auprès des Régions), et de recenser l'ensemble des stages suivis par les personnes sans emploi au cours d'une année, quel qu'en soit le financeur (Pôle emploi, État, Régions, stagiaire lui-même).
- des sources provenant des organismes de formation permettent de décrire l'offre en matière de formation :

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<sup>1</sup> Programme qui s'appuie sur la recommandation du Parlement et du Conseil du 18 décembre 2006 relative aux compétences clés pour l'éducation et la formation tout au long de la vie.

il s'agit de l'exploitation statistique des documents (bilans pédagogiques et financiers) que les organismes de formation ont obligation de remplir et dans lesquels ils décrivent leur activité.

- les sources provenant des entreprises : il s'agit de l'enquête européenne Continuing Vocational Training Survey qui décrit les pratiques des entreprises en matière de formation continue, et des déclarations fiscales liées à l'obligation de participation des entreprises au financement de la formation professionnelle et établies chaque année par les entreprises d'au moins 10 salariés (déclaration 24-83), qui permettent de disposer d'une série longue sur la proportion de salariés ayant suivi une formation et sur la durée moyenne des formations.

Ces données ne recourent pas nécessairement l'indicateur de participation dans la mesure où les protocoles de collecte, la période d'observation, les concepts retenus ne sont pas comparables. L'ensemble des données financières et qualitatives disponibles peuvent être consultées au sein d'un document annexe à la loi de finances portant sur la formation professionnelle

#### Remarques quant à la construction de cet indicateur :

Plusieurs difficultés liées à cet indicateur peuvent être identifiées :

##### 1. La première concerne la déclinaison nationale des concepts retenus au niveau européen :

En effet, si l'on s'appuie sur les travaux de la Task Force on measuring lifelong learning mise en place en 2000 au sein d'Eurostat, travaux qui ont débouché sur la réalisation de l'enquête AES, l'activité d'éducation formelle est définie comme répondant aux sept critères suivants : intentionnalité, organisation, cadre institutionnel et localisation, structure hiérarchisée par niveau, conditions d'admission, inscription, méthode d'enseignement, durée et programmation. Plus récemment, le manuel Eurostat Classification of Learning Activities propose une autre manière de définir l'éducation formelle, susceptible d'en élargir le champ : l'activité d'éducation formelle doit être conçue pour conduire à un titre inscrit dans le cadre national des certifications (National Framework of Qualifications). Du même coup, le champ de la formation formelle ne se limite plus au système éducatif traditionnel, mais s'ouvre à l'ensemble des formations conduisant à un titre reconnu au niveau national. La formation non-formelle doit répondre au moins aux trois premiers critères énoncés par la Task Force MLLL : intentionnalité, organisation et cadre institutionnel. Par cadre institutionnel sont entendues « la présence d'une personne qui dispense un enseignement et d'une autre qui le reçoit et la possibilité de faire intervenir la notion de programme éducatif qui implique une planification de l'activité ». Dans le manuel européen, c'est l'absence d'inscription dans le cadre national des certifications qui permettra de distinguer la formation non-formelle de l'éducation formelle .

Or l'enquête Emploi structure le champ de la formation selon une logique institutionnelle : y sont distinguées les formations suivies au moment de l'interrogation dans le cadre du contrat de travail, et les « cours ou formations, même courtes, suivies au cours des 3 derniers mois ». L'obtention d'un diplôme est également questionnée, mais sans lien avec les éventuelles formations suivies. Les questions sont donc très axées sur le marché du travail et n'envisagent pas les cours liés aux pratiques sportives ou artistiques, les séminaires et conférences, les cours de langue...Le champ semble au final plus restreint que celui défini par la variable communautaire sur l'éducation non formelle. De plus, la distinction formel/non formel n'est pas possible de manière claire à travers l'enquête.

##### 2. Un certain nombre de limites, tenant cette fois à la définition de l'indicateur, méritent également d'être soulignées :

- la borne supérieure de la tranche d'âge rend l'indicateur tributaire du taux d'emploi des 55-64 ans : de 38,1% en France en 2006, il est très supérieur dans les pays scandinaves et au Royaume-Uni (Suède : 69,6%, Royaume-Uni : 57,4%), contribuant à l'augmentation du taux de participation à la formation continue des 25-64 ans dans ces pays ;

- la période d'observation est constituée des quatre semaines qui précèdent l'enquête, ce qui revient à survaloriser les formations fréquentes et courtes (notamment en termes de durée de chaque séance), au détriment des formations plus rares mais plus approfondies, plus susceptibles de déboucher sur une certification.

A titre d'illustration sur ces deux derniers points, d'après la version française de l'enquête Adult Education Survey de 2006, le taux d'accès à la formation des adultes âgés de 25 à 64 ans, défini comme la proportion d'individus ayant suivi au moins une formation au cours des douze derniers mois précédant l'interrogation est de 34,3 % (32,6 % hors auto-formation) ; il est de 14,2 % (13,6 % hors auto-formation) pour les personnes de niveaux de formation Vbis et VI (sortie avant la troisième, ou avant la dernière année de CAP-BEP).

Une Task Force, initiée par Eurostat et composée de plusieurs experts nationaux, a été créée pour améliorer la comparabilité des données sur l'éducation. L'idée est de préciser les concepts permettant de définir les contours de la formation. Le groupe devrait permettre de proposer à l'horizon 2010 des questions mieux harmonisées, qui seront soumises à l'ETS (groupe communautaire des statistiques du travail), puis au LAMAS (groupe communautaire des statistiques du marché du travail) en décembre, et en 2010 aux directeurs de statistiques sociales et au comité du programme statistique.

## Early school leavers

### 2.1. Eléments de contexte :

Cet indicateur, basé sur la labour force survey, fournit des données annuelles sur la proportion des jeunes de 18-24 ans qui ont arrêté en premier cycle de l'enseignement secondaire ou moins et qui ne poursuivent pas d'études, ni de formation. (c'est à dire n'ayant ni réussi le niveau ISCED 3, ni suivi une formation dans les 4 dernières semaines). L'objectif fixé au niveau européen est de passer sous les 10 % de jeunes quittant prématurément l'école, ce taux s'élevant, pour ce qui concerne la France, à 12,7% en 2007 (la moyenne des 27 pays de l'UE étant à 14,8%).

### 2.2. Politiques mises en oeuvre pour lutter contre le décrochage scolaire :

Plusieurs dispositifs ont été mis en place depuis de nombreuses années pour prévenir l'échec scolaire, prévenir les sorties prématurées du système éducatif et pour corriger les inégalités.

La mise en place du socle commun (voir détails point suivant) constitue la réforme la plus importante à cet égard. L'acquisition du socle constitue désormais l'enjeu de la scolarité obligatoire et l'étiage à partir duquel se définit l'échec scolaire et s'organise sa prévention.

La nouvelle organisation de la dernière classe de collège se situe également dans la perspective de réduire les sorties précoces du système. Ainsi, plusieurs dispositifs ont été mis en place pour aider l'élève à préparer son orientation tels que des options ou modules de découverte des métiers et des formations.

Par ailleurs, le ministère de l'Éducation nationale a une mission d'insertion. A ce titre, obligation est faite à tout établissement d'assurer le suivi vers l'accès à la qualification de chaque jeune qui sort sans solution du système éducatif pendant l'année suivant sa sortie (Mission générale d'insertion).

Pour rendre opérationnel cet objectif, les acteurs de l'insertion sur les territoires développent des activités de prévention comprenant le repérage et l'accueil des élèves démotivés, absentéistes et en risque de décrochage, la mise en place de modules de remotivation et de remédiation correspondant aux besoins des élèves repérés, et des activités de formation comprenant remises à niveau, aide à la formalisation d'un projet professionnel, actions diplômantes, actions d'accompagnement vers l'emploi.

*Enfin, le ministère de l'Éducation a engagé en 2007 un plan d'envergure en vue d'accroître le niveau général*

### *d'obtention des qualifications et lutter contre les sorties sans qualification : la rénovation de l'enseignement professionnel :*

Aujourd'hui, le baccalauréat professionnel préparé en quatre ans est très sélectif : l'existence de deux cursus successifs (deux années de brevet d'études professionnelles (BEP) suivies par deux années de baccalauréat professionnel) et une offre géographique insuffisante découragent plus de la moitié des élèves de BEP et sont facteurs de sortie prématurée. Ainsi, 30% seulement des entrants dans le cursus obtiennent le baccalauréat professionnel. Une rénovation de l'enseignement professionnel (niveau secondaire) a donc été engagée en 2007 afin, à la fois, de mieux répondre aux besoins du marché du travail et de réduire le nombre de jeunes quittant le système scolaire sans qualification, tout en facilitant la poursuite d'études supérieures.

#### Ce plan de rénovation repose sur trois priorités :

1. La refondation de l'offre des diplômes et de la certification, qui se traduit notamment par une réduction de la durée du cursus menant au baccalauréat professionnel (trois ans au lieu de quatre, après le collège), par la définition d'une certification intermédiaire pouvant être passée au cours du cursus, et par une refonte des programmes et des modalités d'évaluation. Cette rénovation tend ainsi à affirmer l'égale dignité de la voie professionnelle par rapport à la voie générale et à la voie technologique. À partir de 2009, la généralisation du cursus en trois ans sera engagée.

2. Le renforcement du pilotage par objectif de la carte des formations professionnelles : l'élaboration de la carte des formations relève principalement des régions alors que la gestion des enseignants relève de l'Etat. Désormais, un pilotage par objectif de la carte des formations permet d'améliorer la programmation concertée entre l'Etat et les régions et de la faire évoluer de façon plus volontariste tant quantitativement que qualitativement.

3. Le développement du « lycée des métiers » : le concept de « lycée des métiers » date de 2002. Ce label qualifie certains établissements qui offrent une palette étendue de formations et de services autour d'une même famille de métiers, grâce notamment à un partenariat actif tant avec le milieu économique qu'avec les collectivités territoriales. Il met en évidence la cohérence d'une offre de formation, la prise en compte des attentes des élèves et l'adaptation aux besoins des employeurs, il constitue un indicateur d'excellence et témoigne d'une démarche qualité. Cette démarche renforce la lisibilité et l'attractivité de l'offre de formation professionnelle. L'objectif est de doubler le nombre de lycées des métiers d'ici 2010.

#### 2.3. Eléments sur le calcul de cet indicateur en France :

Cet indicateur comme le précédent est calculé à partir des Labour Force Survey. Pour la France, les jeunes qui ne poursuivent pas d'études, qui n'ont pas réussi le niveau ISCED 3, et ne suivent pas une formation dans les 4 dernières semaines, correspondent aux jeunes de 18-24 ans qui ne poursuivent pas d'études, ni de formation et qui n'ont ni certificat d'aptitude professionnelle (CAP), ni brevet d'études professionnelles (BEP) ni diplôme plus élevé (baccalauréat). Selon cet indicateur, le nombre de sortants s'élève en France à 12,7% des jeunes de 18-24 ans en 2007, soit 120000 jeunes environ.

Par ailleurs, un autre indicateur est également utilisé en France : le nombre de sortants « sans qualification » calculé à partir des statistiques scolaires. Il s'agit de jeunes qui quittent le système éducatif avant d'avoir atteint l'année terminale de CAP ou de BEP, ou la classe de seconde ou de première. Depuis 2005, ils sont environ 40 000, soit 6 % des jeunes sortants.

Cet indicateur « français » des sortants « sans qualification » est un sous ensemble du critère de référence européen (qui correspond approximativement aux jeunes sortis « sans diplômes ») : ainsi, pour 100 jeunes sortis sans diplôme (ou avec seulement le brevet des collèges), 35 jeunes ont arrêté en premier cycle ou en première

année de CAP ou de BEP (ce qui correspond à l'indicateur relatif aux « sortants sans qualification »), auxquels s'ajoutent également 24 jeunes qui ont échoué à l'examen de CAP ou de BEP, 12 jeunes qui ont arrêté en seconde ou en première, et 29 jeunes qui ont échoué à l'examen du baccalauréat ou son équivalent professionnel.

Depuis 2007, les outils nationaux de programmation budgétaire ne font plus référence à l'indicateur « national » portant sur le nombre de sortants « sans qualification », et utilisent désormais le critère de référence européen, ce qui en souligne sa fiabilité. Néanmoins, l'indicateur « national » est toujours utilisé dans les tableaux de bord utilisés par le ministère de l'Education nationale, car il se décline également au niveau académique. En effet, le critère de référence européen ne se décline pas au niveau régional, même s'il permet a contrario des comparaisons européennes.

### **Low achievers in reading**

#### 3.1. Eléments de contexte :

Cet indicateur fournit des données annuelles sur le pourcentage de jeunes de 15 ans ayant de mauvais résultats en lecture. L'objectif est de faire baisser ce critère de référence d'au moins 20 % par rapport à 2000, année pendant laquelle cet indicateur s'élevait à 21,3% de la population. Ainsi, il faudrait atteindre pour 2010 un niveau de 15,5 % de mauvais résultats en lecture au niveau européen, ce qui paraît difficilement atteignable, dans la mesure où les résultats 2006 faisant état de 24,6% de jeunes de 15 ans ayant de mauvais résultats en lecture en Europe.

#### 3.2. Politiques mises en oeuvre pour améliorer les compétences de base des jeunes :

Pour lutter contre l'échec scolaire et favoriser l'égalité des chances, la loi a établi en 2005 que la mission première de l'Ecole est de garantir à tous l'acquisition d'un socle de connaissances et de compétences, « indispensables pour accomplir avec succès sa scolarité, poursuivre sa formation, construire son avenir personnel et professionnel et réussir sa vie en société ». Le socle est constitué de 7 compétences<sup>1</sup>, déclinaisons des compétences clés définies au niveau européen.

Afin d'évaluer la maîtrise progressive du socle commun par les élèves, trois paliers sont prévus :

- le premier (fin de C.E.1) correspond notamment à l'acquisition de la lecture courante et de l'écriture ;
- le deuxième (fin de l'école primaire) mesure en particulier l'acquisition des règles fondamentales de la grammaire, du calcul élémentaire et des quatre opérations ;
- enfin, le brevet des collèges atteste de la maîtrise des sept compétences du socle.

Des dispositifs d'aide individualisés ont été prévus pour les élèves qui risquent de ne pas maîtriser les connaissances et les compétences attendues à la fin de chaque cycle.

Par ailleurs un livret personnel permet à l'élève, à sa famille et aux enseignants de suivre l'acquisition progressive

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<sup>1</sup> **Les 7 piliers du socle commun :**

- ✓ la maîtrise de la langue française ;
- ✓ La pratique d'une langue vivante étrangère ;
- ✓ Les principaux éléments de mathématiques et la culture scientifique et technologique ;
- ✓ La maîtrise des techniques usuelles de l'information et de la communication ;
- ✓ La culture humaniste ;
- ✓ Les compétences sociales et civiques ;

L'autonomie et l'initiative.

des compétences ; il a été expérimenté au cours de l'année scolaire 2007-2008.

### 3.3. Eléments sur le calcul de cet indicateur en France :

L'indicateur de Lisbonne sur les mauvais résultats en lecture est calculé à partir des données de l'OCDE recueillies dans le cadre de PISA (Program for International Students Assessment ou Programme international pour le suivi des acquis des élèves) qui s'adresse aux élèves de 15 ans scolarisés (en France ils se trouvent essentiellement en 2<sup>nde</sup> et en 3<sup>ème</sup>).

Cette opération, confiée à un consortium international spécialisé dans la mesure des compétences, permet de bâtir une échelle de performance sur cette dimension dont la définition produite par l'OCDE est la suivante : "Comprendre l'écrit c'est non seulement comprendre et utiliser des textes écrits, mais aussi réfléchir à leur propos. Cette définition va au-delà du simple décodage et de la compréhension littérale. Elle implique la compréhension et l'utilisation de l'écrit, la réflexion à son propos à différentes fins." Cette capacité doit permettre à chacun de réaliser ses objectifs, de développer ses connaissances et son potentiel et de prendre une part active dans la société.

L'indicateur européen sur les compétences en Literacy est calculé à partir des résultats des bas niveaux (1 et au-dessous de 1) de PISA.

En 2010 l'un des objectifs à atteindre est de faire passer le pourcentage des lecteurs les plus faibles autour de 15,5 %. Cet objectif semble difficilement atteignable pour la France puisque les résultats de PISA 2006 situent la France à 21,8 %. De manière plus générale cette cible sera difficile à atteindre pour l'Europe, dont les derniers résultats de PISA se sont dégradés.

Pour autant, cet indicateur est fiable, et a d'ailleurs contribué aux réflexions portant sur le système éducatif national. En particulier, il a beaucoup aidé dans la réflexion sur le bien-fondé du redoublement, et la mise en place du socle commun.

## LIECHTENSTEIN

### **Performance in relation to the benchmark on Participation in Lifelong Learning (25 – 64 years of age)**

Data of participation in Lifelong Learning cannot be collected completely as people from Liechtenstein mostly participate to Lifelong Learning in the neighbouring countries (Switzerland, Austria). Actually it is not possible to receive the data from these countries and so no statistical data is available.

### **Performance in relation to the benchmark on early school leavers**

The school drop-out rate in Liechtenstein is low. Exact data are collected for apprentice and is on average of the last years 5 % of alumni.

### **Performance in relation to the benchmark on low achievers in reading**

To provide an informative basis a research paper has been worked out about the situation of functionally illiterate people in Liechtenstein. The results of the study showed that, like many other European countries, Liechtenstein faces a literacy problem. The Adult Education Liechtenstein Foundation is founder member of the Swiss Organization of Literacy and Liechtenstein started a project to offer courses in cooperation with the Swiss organization. A provider in Liechtenstein has assumed the planning of the courses and in 2008 the first courses started. The courses are financed at 80% by public funds. In the process the following targets have been set:

- Impact of information to all relevant people and authorities
- Hotline for information about the courses offered
- Organization of courses offered for functionally illiterate people
- Prevention

### **Which are the policy measures taken to increase/decrease these 3 benchmarks, to improve the quality of adult learning staff and investment?**

Experience has shown that the measures taken have been efficient and we are going to continue that way within our abilities.

In adult learning the Adult Education Liechtenstein Foundation is responsible for the quality management. All providers receiving public funds have agreed by a service level agreement including the quality management with clear guidelines according to the size of the institution.

### **How and by who it is been measured?**

The providers have to submit yearly the evaluation of the courses offered (for example a customer satisfaction analysis) together with the annual report, statistic data and financial statement.

### **Is there a management information system for providers and how does it function?**

Controlling and Reporting system is introduced by rules of procedure.

### **Is there any measurement on the quality of staff and providers?**

The quality of staff and providers is controlled on the occasion of the accreditation of the provider. The accreditation is required for approval of public funds.

**Issues and trends - what are the gaps you identify and who are needed for a better monitoring of the sector?**

Due to the smallness of Liechtenstein people take mostly the opportunity of the neighboring countries - mainly for vocational training and education. Also the formal vocational education is strongly connected with Switzerland. Adult Education in Liechtenstein looks back at a long tradition and is well anchored in people's mind.

We will not have the ability to install a comprehensive monitoring system in the near future

## NETHERLANDS

### Participation in Lifelong Learning (25 – 64 years of age)

Participation in lifelong learning increased from 15,5% in 2000 to 16,6% in 2007. The national target is 20%. After a quick increase to 17,4% in 2003 a period of decrease followed. Until 2006 participation fell down to 15,9%. This was amongst others due to an economic downfall.

#### National policy

In 2005 government decided to establish the Project Unit Learning and Working (PLW), collaboration between the ministries of Education and of Social Affairs and Employment. This collaboration brings the worlds of education and labour market closer to each other. The Project Unit Learning and Working takes action in four areas of lifelong learning where additional effort is needed. These areas are:

- Regional collaboration: It is clear that partners in the region - companies, formal and non-formal training suppliers, employment services, local authorities - can't always find each other. As a consequence of this training doesn't take place.
- Transparency of the training market: the training market is not transparent, i.e. it is hard for individuals and employers to find the right course or training programme, because the information is diverse and scattered over a huge number of sources.
- Flexible and tailor made supply: the supply of training is often not tailored to the needs of the individual and the employer. A system of RPL is not yet fully implemented and for different reasons it appears to be difficult to offer tailor made training programmes.
- Target groups: some groups of employees have less chance to get involved in learning. These are amongst others the lower educated and the elderly.

We want to realise progress in these areas by encouraging regions to make deals with the government to establish regional partnerships and to realise a number of predefined targets. So far 45 regional partnerships have been realised. These partnerships have committed themselves to building an enduring collaboration in the field of lifelong learning. They also committed themselves to reach concrete targets i.e. a certain number of people who start with a work-based learning programme and/or follow a RPL-route. We now reached about 65.000 work-based learning programmes and 20.000 RPL-routes. Furthermore we help schools and universities to implement an RPL-system and for the sake of transparency we build an internet - portal where all learning possibilities can be found. We continue these stimulating activities until 2011. By that time we trust that the regional partnerships for learning and working have been firmly incorporated in the regional socio-economic infrastructure.

#### Financing Lifelong learning

In The Netherlands there is a division of responsibilities concerning the financing of LLL:

- Employers and employees are responsible for the training of employees;
- The government is responsible for initial education and the training unemployed people.

#### Public investments

The government takes however a broader responsibility for post-initial training. Especially for the lower educated adults to reach a minimum labour market qualification (defined as level 2 of NVQ). Every Dutch adult

has the right to acquire a level 2 qualification through public funded education. Most of the time the courses are followed via alternating programmes. The only costs for the individual are the enrolment fees (appr. €200 a year) and the costs of books, etc. But adults also can enrol in publicly funded higher professional and university education programmes. They also need only to pay fees ( between € 1150 and € 2000).

The government also has an information, stimulating and facilitating role. There are a number of financial arrangements for stimulating post-initial education and training:

- Part of the budget for the reintegration of the unemployed is specified as training budget (€ 105.000.000);
- Individuals can deduct their training costs from income taxes (with a threshold of € 500)
- Employers can deduct specific training costs:
  1. An employer who trains a former unemployed employee to a level 2 qualification can get a tax reduction of max. € 5500 per year during two years
  2. Since 1 January 2007 an employer can get a tax reduction of € 300 for each employee who gets the opportunity to have his competencies tested through an APL-procedure.
- The Levensloopregeling (“Course of life regulation”), which is a regulation that gives employees the opportunity to save money from income before paying taxes for a period of leave for different goals (e.g. caring of parents, travelling) gives also the opportunity to save for educational leave.
- Also the more general Spaarloonregeling (regulation to save money from income before paying taxes, whereby savings are blocked for a period of 4 years) can be used to pay training costs and is also one of the options (next to buying a house) to unblock the savings within the period of 4 years.).
- There are also some subsidy regulations to stimulate the cooperation between regional partners (companies, educational institutions, employment services, local authorities) to improve participation in lifelong learning. (€ 40 million total in 3 years).

#### Private investments

In a lot of collective labour agreements of corporate sectors (construction, metal, catering, caring, etc.) is established that enterprises pay a certain percentage of the total wage and salary bill in the TDF. This varies between 0,1 and 0,7%. Enterprises are compensated for their training and holdup costs through their TDF. A TDF has also an advising role to the companies on traing and development matters. Some of the biggest funds have between € 50 and € 100 mln.

Total expenses post-initial training (approximately per year)

Publicly funded training	€ 1.500.000.000
Tarining funded by companies	€ 1.975.000.000
Training funded by individuals	€ 1.000.000.000

#### Measurement

Improvement in participation is measured via the national Labour Force Survey. In 2008 the Adult Education Survey was held for the first time. The results of the PLW-activities are monitored by CINOP, an independent research institute.

#### **Early school leavers**

In 2000 15,5% of the age group between 18 and 24 years of age left school early. In 2007 this percentage

decreased to 12,0%. The national target in 2010 is 10%.

### National policy

In 2006, the previous cabinet started to combat dropping out. Important measures have already been implemented. For example, a qualification obligation has been introduced: young people are obliged to follow an education programme until their 18th birthday, with the aim of obtaining an MBO [secondary vocational education] level 2 or HAVO/VWO [general secondary education/pre-university education] diploma; this may be done in a combined learning and working situation. The registration of school drop-outs has been significantly improved.

The current cabinet is determined to halve the number of new drop-outs by 2012. This means a figure of no more than 35,000 compared with 71,000 in 2002. The Aanval op Schooluitval [Drive to Reduce Drop-out Rates] programme is therefore being continued with additional actions and extra funds. In the first half of 2008, State Secretary Marja Van Bijsterveldt made agreements with all the regions of the Netherlands. Any school that manages to reduce its drop-out rate will receive € 2,000.00 for each drop-out less than the number it had in the reference year (2005/06). Furthermore, additional funds are available for educational programmes aimed at reducing drop-out rates. Funding of the programme: € 26 million in 2008 rising to € 90 million in 2011.

### Regions to take action now

The involvement of professionals from the region (schools, municipalities, youth services, the business community, etc.) is essential to a tailored attack on dropping out. These are the bodies that know exactly what is going on in relation to the students in their region, from problems at home to the local demand for technicians and the football pitch round the corner. That is why the Ministry of OCW has made agreements with municipalities and schools for the period 2008-2011, set down into covenants. The aim of these agreements is:

- To reduce the number of new school drop-outs by half by 2011/2012: reduction rising from 10% in 2008 to 40% in 2011 (10% has already been achieved).
- The funds provided under the agreements only go to schools (schools are often the place where problems are found as well as the place where dropping out can be combated). Via the local governments, schools can call on the services of care institutions, the police and judicial authorities.
- The regional municipality directs the agreements.
- Needless to say, the Ministry of OCW will support the parties as much as possible in order to achieve the agreed outcomes.

Main principles of the programme:

- Additional attention to the transfer from VMBO [pre-vocational secondary education] to MBO;
- More and better special needs provision at school;
- More room for students who prefer to work with their hands and more tailored programmes;
- Better career orientation and guidance, study choice and counselling;
- More attractive education with sports and culture to keep young people in school;
- 20,000 programmes for school drop-outs in the age group from 18 to 23 for 'competencies acquired elsewhere' and agreements with large employers aimed at obtaining basic qualifications.

### The golden triangle: state, municipalities and schools working together

Combating dropping out only has a chance of succeeding when all stakeholders (the state, municipalities and

schools) work together. The efforts of schools, municipalities, youth services, the business community, parents, social workers, the police and judicial authorities are essential. They are, after all, the ones who know exactly what is needed in their region in order to further reduce the drop-out rate. Therefore, as was done for the 2006/07 school year, OCW is making agreements with municipalities and schools in 39 regions for the period 2008-2011 and is setting these agreements down into covenants. The goal: to reduce the number of school drop-outs by half by 2012. Per region, municipalities, schools and care institutions can themselves decide what measures should be implemented: the measures already mentioned or possibly new measures. It is the result that counts. At the end of four years, an analysis will be made of which measures have had an impact. These will then be safeguarded as far as possible in the funding systems of schools and other institutions. To date, this cooperation has been running smoothly. The state, schools and municipalities are thus referred to as 'the golden triangle'. The municipality directs matters in the region – in terms of the schools, the police, youth services and debt restructuring. It is, however, of paramount importance that all parties at all levels are well aware of the usefulness of and need for combating dropping out. The Ministry of OCW will support all parties wherever possible.

#### Registration and evaluation

Until about two years ago, there was no qualitative and quantitative analysis of the problem of dropping out of school. Data was lacking, incomplete and out-dated. An excellent move has been made to tackle just this point with the introduction of the so-called 'Education Number', a system that offers complete and reliable figures on drop-out rates nationally, regionally and at the municipal and district levels. These data are linked to socio-economic data (including demographics, native Dutch citizens, ethnic minorities, unemployment, people entitled to benefits, etc.) per region, city and district. In this way a wealth of information is at hand for implementing policy and adjusting it when necessary. The results are monitored by quantitative and qualitative research (TIER; Top Institute for Evidence Based Education Research) and constant track is kept of what works and what doesn't, using facts and figures and exchanging good practices between the regions.

#### **low achievers in reading**

In 2007 the ratio of low achieving pupils in the Netherlands of 15,1% is one of the lowest in Europe according to the OECD PISA study. The national target is to reduce it further to 9%.

#### National policy

However Dutch pupils are performing worse in the basic competences than they did before. The government concluded that improvement in the education of basic competences in primary and secondary education is necessary. Therefore the ministry of Education has established in 2007 the Expert groep Doorlopende leerlijnen Taal en Rekenen (Expertgroup on Reading and Arithmetic). The expert group advised the government about measures that should lead to improved performances. The most important advice is to establish reference levels for 12, 16 and 18 year olds. In these reference levels are the competence levels described which a person should have achieved at a certain age. The levels are compulsory and must be examined continuously. The government adopted this advice. The reference levels must be implemented by August 2010.

The next three year an additional total sum of € 115 million will be invested in reading- and arithmetic education. After 2011 an extra € 15 million per year.

#### Measurement

The results will be measured each by the Inspectorate and each three year by PISA.

#### **Issues and trends - what are the gaps you identify and who are needed for a better monitoring of the sector?**

- Informal learning is considered as very important in the career development of employees. Therefore more and more the need is felt to try to get a grasp on the measurement of informal learning. This proves to be very difficult. The question is whether we will be able to define informal learning in a way that each country uses the definition in the same way, which is necessary for comparison between the member states.
- The definition of the research population in the LFS of the national statistical agency CBS and Eurostat is different. This results in different figures of participation (e.g. 13,6% vs 15,5%) in lifelong learning. This causes a lot of confusion. Shouldn't these definitions be harmonised?
- The same counts for differences in the definition of learning in LFS (formal and non-formal learning) and AES (formal, non-formal and intentional informal learning). Interpretation of the figures is a hell of a job and in policy it is impossible to accompany the figures with all the nuances. As an example see the table below.

Table

<b>% AES</b>	<b>% Lissabon (2007)</b>	<b>Land</b>	<b>Rangnr. AES</b>	<b>Rangnr. Lissabon</b>
69,4	32 (2006)	Zweden	1	1
51,2	23,4	Finland	2	3
50,6	18,0	Noorwegen	3	4
43,1	7,8	Duitsland	4	9
42,1	16,6	Nederland	5	5
41,2	3,9	Slowakije	6	16
40,3	26,6 (2006)	VK	7	2
40,2	8,4	Estland	8	12
39,8	12,8	Oostenrijk	9	6
39,5	7,4	Cyprus	10	8
35,2	1,3	Bulgarije	11	19
34,1	7,0	Frankrijk	12	10
30,9	5,3	Litouwen	13	14
30,7	7,1	Letland	14	11
27,2	10,4	Spanje	15	7
20,2	6,2	Italië	16	13
18,6	5,1	Polen	17	15
12,7	2,1	Griekenland	18	18

6,8	3,6	Hongarije	19	17
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There are great changes in ranking of member states between LFS and AES. How should we interpret this. Does career development in Germany and Bulgaria rely for a great deal on informal learning and in the Netherlands on formal learning? Or are there totally different reasons for the great changes in the position of countries when it comes to participation in lifelong learning?

**Conclusion - what lessons have been learned in your country in the context of this PLA that can be applicable to other European countries?**

What we need are clear definitions and unambiguous outcomes. For the sake of comparability data collection must be done in a uniform way and should not be multi interpretable. For issues or themes (e.g. informal learning) where this is not possible we should not include them in comparative research.

## NORWAY

Norway is a country with a well regulated labour market, investment in a highly educated, skilled and adaptable workforce, high wage level and relative small differences in income. There is a strong agreement between the social partners and the Government about social justice and equity within the Norwegian education system and a common desire to raise the general level of competence for the entire population. To reach this goal there is a commitment to develop frameworks for providing opportunities for all to be educated and to be a part of the knowledge society.

Adult learning and education includes a multitude of learning activities, such as formal adult education on primary, lower secondary and upper secondary level, non formal learning in folk high schools and adult education associations/organisations, distance education institutions and various work place learning. Moreover, adult learning for the larger part takes place outside the formal education system, most often in the form of skills development in the workplace or local based community and cultural learning.

In the Nordic societies three dimensions seems to be significant characteristics of adult education and training; the first refers to participation in wider society and relates to the concept of democracy, civil society and citizenship. The second is that adult education and training are called upon to help improve the match between educational qualifications and skills, on the one hand, and broad participation in the labour market, on the other. The third refers to the shared wish to create an inclusive learning society in which participation is truly for all.

Institutions responsible ALE at national level

The Government has an overall responsibility for basic education, for student financing, taxation system and for legislation.

i) The Ministry of Education and Research is responsible for administering the statutory educational provisions of the Education Act as well as developing curriculum guidelines. Further the Ministry is, according to the Education Act, responsible for the general development of formal adult education and for higher education..

ii) Vox - National institute for adult learning promotes the participation of adults in society and working life by increasing their competence level with particular attention to basic skills. Vox is an agency of the Ministry of Education and Research.

iii) Norwegian Directorate for Education and Training is responsible for the development of primary and secondary education for children, youths and adults and it is the executive agency for the Ministry of Education and Research. The Education Act includes provisions concerning the right of adults to primary and secondary education.. The Directorate is responsible for all national statistics concerning primary and secondary education and on the basis of these statistics initiates, develops and monitors research and development.

iv) The County Governor's Offices, one in each county, have a quality control function and shall ensure that children and adolescents are given an appropriate education in accordance with statutory regulations.

v) The Norwegian Association for Adult Learning (NAAL) is the national NGO umbrella for adult learning in Norway. Under this umbrella there are 20 governmentally approved adult education associations with a member network of more than 400 NGOs. The purpose of NAAL is to advocate the common interests of the associations and their participants vis-a-vis the Government, the Parliament and the Ministry of Education and Research, and to promote non-formal adult learning in society at large. NAAL is a member of the European Association for Education of Adults (EAEA) and the International Council for Adult Education..

viii) Norwegian Association for Distance and Flexible Education (NADE) is a national membership NGO for institutions involved in distance education. The members of the organisation are independent distance education institutions, public universities and colleges, private institutions and training centres for business and industry. NADE is a consultative and co-operating body for the Ministry of Education and.

**Which are the policy measures taken to increase/decrease these 3 benchmarks, to improve the quality of adult learning staff and investment?**

There has been made no specific benchmarks regarding to the three different groups, but it is put much effort into making the first one higher and the two next lower. In addition we refer to the benchmarks set up by EU in the Lisboa-process.

Below is mentioned some of the current initiatives:

The Ministry of Education and Research is this spring preparing a White Paper on “Competences for the future” – with special stress on the competence needs in the working life in the years to come. The three benchmarks are debated, especially the early school leaver on vocational upper secondary education. The drop-out-rate there is high – up till ca 30 % for the young pupils. There will probably be put forward some propositions on how to get that rate down. Further might it be proposed some other national benchmarks in the paper.

There has been given statutory rights for adults to complete primary, lower secondary and upper secondary education.

From 2006 the Norwegian government established a program to enhance basic skills in working life Program for basic skills in working life (BKA). This program is part of the government effort to create a knowledgebased society based on social values of inclusion and equality. The purpose of the program is to ensure that adults acquire the basic skills they need to meet new requirements and rapid changes in working life and to avoid unemployment due to the lack of basic skills.

The program funds and monitors enterprise-based courses on basic skills. Projects organised outside workplaces can also, on certain conditions, receive funding, provided the objective is to prepare people for working life.

The program concentrates on reading, writing, numeracy, and digital skills. Any enterprise in Norway, private and public, can apply for funding from the program and the following criteria have been put emphasise on from the start of the program:

- the learning activity should be combined with work and basic skills training should preferably be linked to other job-relevant learning Training and education combined with a paid job often gives the best results, especially for groups with low levels of formal education.
- the skill levels aimed for correspond to the lower secondary school
- the courses should strengthen the participants’ motivation to learn

To increase the quality of adult education at this level a Framework for Basic Skills for Adults has been developed. The framework describes levels of competence for each of the basic skills that the program comprises (literacy, numeracy, ICT skills and oral communication). The main objective of this work is to increase the quality of teaching and ensure that individuals can get education adapted to their needs, so that every adult can attain the level of basic competence that enables him/her to meet the increased demands of today’s work and everyday life.

**How and by who it is been measured?**

The data for our measuring is mostly collected by Statistics Norway (SSB). For the formal education for adults it

is collected statistics for all the persons passing the exams.

For the larger part of learning offered by the NGOs it collected data yearly by SSB commissions by the Ministry.

The participation in learning activities in working life is measured yearly in “The Learning Conditions monitor”. The data is also here collected by SSB, as some extra questions to our large, yearly survey “Arbeidskraftundersøkelsen (AKU)” - Survey on the Workforce.

Further there are made evaluations to some of the programmes e.g. BKA and there are conducted surveys on different subjects.

#### **Is there a management information system for providers and how does it function?**

For adults there are a lot of information sources – and also for the providers, but up till now there has been no special system for providers of adult education.

Vox, as a national center, is the nearest to such a system in Norway. Some of their tasks can be seen as information for the providers e.g. Vox finance educational projects aimed at improving the education of basic skills in the adult population and Vox administer governmental funding directed towards educational non-governmental organizations and open and distance learning institutions and pedagogical development in this field.

#### **Is there any measurement on the quality of staff and providers?**

Providers of adult education are for both formal and non-formal education.

For the formal education system there are certain requirements for the teachers, see the example beneath. In the non-formal part there are no formal requirements, but the NGOs are responsible themselves for the education they offer.

Educational qualifications/training required for adult instructors

The question of improving quality is taken up generally for teaching staff for children, youth and adults. Responsibility for the quality of primary, lower secondary and upper secondary education is in the hands of the local and county authorities. The central authorities have developed a number of tools designed to facilitate the efforts of the school owners to develop the quality of schools. Public funding is also granted to support competence development and development projects.

In Norway there are no formal qualification requirements for teachers in adult education, but more than 90% of the teachers are qualified. Compared to the other Nordic countries, adult education has a low profile as an academic field in Norway.

As an example we can present teacher education which is a complex field. The purpose of the various teacher education courses is to provide teachers for specific subjects, or specific types of education. However, teachers' competence overlaps in such a way that school owners are able to assemble teams of teachers according to the needs of the individual school. By structuring their studies or by taking further courses, teachers are able to extend the scope of their qualifications.

- Pre-school teacher education (3 years) qualifies for educational work in kindergartens and the first year of primary school. The addition of one year's relevant further education qualifies pre-school teachers for work from the first through the fourth year.
- General teacher education (4 years) qualifies for teaching in primary and lower secondary school, and in adult education at the corresponding levels.
- Subject-specific teacher education (either 3 year or 4 years) qualifies for teaching of specific subjects in

primary and lower secondary school, in upper secondary school and in adult education. This education also certifies candidates for other cultural work with children and adolescents.

- Vocational teacher education (3 years) qualifies for teaching in upper secondary school and adult education. Candidates also qualify for teaching specific subjects from the fifth year of primary school onwards.
- teacher education programme (1 year) builds on a graduate course of academic studies or on a vocational training course with practical training and vocational theory, and qualifies for teaching from the fifth year of primary school, in upper secondary school and in adult education.
- Integrated master's degree (5 years) qualifies for the teaching of certain subjects from the fifth year of primary school, in upper secondary school and in adult education.

Master of science in Adult Education: NTNU Norwegian University of Science and Technology – provides a research based programme on adults' ability to learn and achieve competence in a lifelong learning perspective. The Master of Science in Adult Education aims to provide students with an understanding of the subject area, considering its development and significance for adult learning. The programme of study also includes theoretical and practical knowledge on how to organize, prepare and evaluate learning outcomes in working life and society in general.

The University of Tromsø has for some years provided and offered a work related part time Bachelor and Master degree study in Adult Education. Target groups for these studies have been teachers, instructors and other staff.

#### **Issues and trends - what are the gaps you identify and who are needed for a better monitoring of the sector?**

The need for better monitoring is mutual, especially policy-makers and education providers will use more knowledge in the field to make better forecasts and hopefully better decisions.

Further on there are discussions going on about the quality measures for the staff, especially the teaching staff, for the non-formal adult education and about setting benchmarks for parts of formal adult education and for participation in all parts of adult education and training (formal and non-formal).

As an example; Calculations show that Norwegian working life spent 44 million working hours on education or training in 2005, corresponding to 8.2 billion NOK in wages to employees attending education or training. About three quarters of these costs are paid by the enterprises. In addition there are expenses for the education/training itself, premises, travel expenses etc. for which there are only approximate estimates.

Even though Norway has a high level of educational attainment, it may be not sufficient to satisfy the shifts in the demands for qualified labour in the future years. Updated and new skills and competence are necessary to improve competitiveness and increase flexibility in a changing working life. It is acknowledged that the Norwegian human resources constitute more than 80% of the national assets. In addition Norway faces an ageing population and all available resources have to be used in the most optimal way.

## SLOVAKIA

The priority objective of the development of adult education in the Slovak Republic is based on the adopted conceptual and strategic materials on the national level. They are targeted on

- The establishment of conditions for general equal and constant access of citizens to acquiring new and renewed skills, which are necessary for participation in society based on knowledge (digital literacy, foreign language competence, social, business skills and developed ability to learn).
- Increasing the level of investments in education as an emphasis of the priority of the most important wealth of Europe – its people. It is related to direct investments, tax regimes, accounting standards, bookkeeping and information duties. It is important to make the investments more structured
- The introduction and promotion of innovations in education regarding the content, form and methods, in education technologies based on the use of information-communication technologies.
- The design of procedures and rules in the evaluation of the participation in education and education results especially in the case of informal and non-formal education (non-institutional). An integrated Europe with an open labour market, free movement of citizens in search of jobs and education requires an effectively designed system for the evaluation of education.
- Ensuring the access to quality information and advice regarding the possibilities of lifelong education for all. Career counselling is understood as permanent and locally accessible service for all, containing not only precise and relevant information regarding education possibilities but also highly professional advice enabling decision-making and motivating individuals to further efforts for better jobs in the region based on acquired education.
- Providing education opportunities as close as possible to learners in their own communities while making the maximum possible use of their support through the means of information communication technologies. That is why establishing conditions for local education in commonly accessible education centers, achieving the approximation of education through communication technologies to less accessible locations or for disabled citizens constitutes a priority.

Adult education in the Slovak Republic constitutes an integral part of lifelong education. The strategic objectives of lifelong education incorporate priorities which are directly related to informal education, i.e. the priorities which directly influence adult education in the informal subsystem of education. These strategic objectives and priorities were adopted and approved in the national Strategy of Lifelong Learning and Lifelong Guidance. The national Strategy of Lifelong Learning and Lifelong Guidance was adopted by the government decree No. 382/2007 from April 25, 2007.

Strategy of Lifelong Learning and Lifelong Guidance identifies following priorities:

1. Monitoring and elaboration of prognoses of education needs of citizens and employers
2. Providing for the system of quality management of lifelong learning and lifelong guidance
3. Recognition of outcomes of non-formal and informal learning
4. Effective investing in lifelong learning and lifelong guidance
5. Development of key competences for lifelong learning
6. Providing complex information services for lifelong learning and lifelong guidance and development of learning regions

7. Effective planning and using structural funds for completion and development of systems of LLL and LLG

Slovak Republic is in relation to the under-mentioned benchmarks at the following stage:

- Participation of adults in lifelong learning (25 – 64 years of age) ... 3,9 % (year 2007)
- Early school leavers (age 18 - 24) ... 7,2 % (year 2007)
- Low achievers in reading (15 years old) ... 27,8 % (year 2007)

**Which are the policy measures taken to increase/decrease these 3 benchmarks, to improve the quality of adult learning staff and investment?**

There have not been taken any specific policy measures to increase the participation of adults in lifelong learning on the national level. The conditions for the local learning have been created on the regional level through the National program for learning regions.

By means of the national project financed by the European Social Fund, there is going to be created the National system of qualification in Slovak Republic. Currently the national project is in the planning stage. The scheduled term of start is September 2009. The National system of qualification is the base for the formation of the system of recognition of outcomes of non-formal and informal learning. After the implementation of the National system of qualification into practice, Slovakia expects increases of the interest of the adult population in lifelong learning. Special national benchmarks have not been established; the participation of those in the 25 to 64 age category in lifelong education is monitored (the European Commission benchmark).

**How and by who it is been measured? Is there a management information system for providers and how does it function?**

The Slovak Republic has no unified methodology of recording the participation of adults in education. The statistical data on the number of adults educated in the informal subsystem of education (continuing education) or in the formal subsystem of education in the form of part time education is processed by the Institute of Information and Prognoses of Education which is a directly managed organization of the Ministry of Education of the SR. Education institutions are obliged to provide statistical information on the implementation of educational activities to the body performing and providing for the processing data of statistical findings (Institute of Information and Prognoses of Education), this obligation is not fulfilled by all education institutions. Despite the fact that approximately 1,200 educational institutions in the Slovak Republic have accredited education programs (2007), the statistical information about their activities are annually provided by approximately 500 education institutions. No special evaluation for increasing of the size of the adult population involved in education was carried out.

**Is there any measurement on the quality of staff and providers?**

Currently there is no state supported quality assurance of the providers of further training. Quality of the further training is ensured by the accreditation of the education programs. There is no required qualification established by legislation for adult educators on the national level.

**Issues and trends - what are the gaps you identify and who are needed for a better monitoring of the sector?**

Currently, there is no uniform procedure or system of monitoring of adult learning in Slovak Republic, which would be comparable to the outputs of particular member states of European Union. Although the Eurostat statistics discovers the data of participation of adults at the age of 25 – 64 at any kind of education last four weeks before discovering, these data are comparable with other member states only in percentage of total participation of adult population at further training in short period of time. It is not monitored according to uniform system and longer period of time (for instance for one calendar year) participation of concrete target

groups at further training, which could reach results comparable to other member states of European Union. The specific reasons for creating of the uniform system of adult learning monitoring are following:

- to ensure the effectiveness of education that responds to the changing needs of the labour market,
- to support the lifelong learning,
- to support the publicity of lifelong learning by increasing its attractiveness (recognition of outcomes of non-formal learning, employment possibilities),
- to provide the extensive and uniform access to education,
- to increase the investment in lifelong learning,
- to support private investment in lifelong learning.

Key areas of adult learning monitoring:

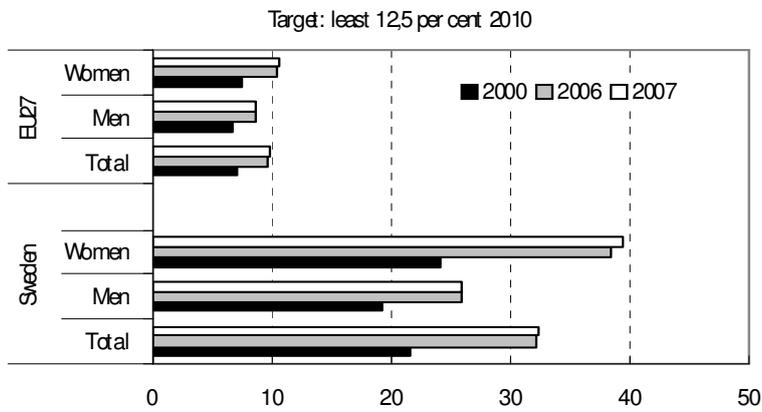
- On-going monitoring of educational needs
- Monitoring of educational structure of the population, that includes monitoring of:
  - a) the part of the population that has at least secondary education,
  - b) the part of the population that is in the age of 18 – 24 and that has only primary education
- Monitoring of participation of adult population in further training according to: the age (18-24, 25-34, 35-44, 45-54, 55-64), gender, achieved level of education, region (district, division), sort of further training. That include monitoring of:
  - a) participation of low qualified population in further training,
  - b) participation of senior population (50+) in further training,
  - c) participation in retraining scheme,
  - d) retraining scheme graduates who found occupation in half a year after leaving the retraining scheme,
  - e) courses with the highest attendance,
  - f) the most frequently applied forms and methods of the further training.
- Monitoring of expenses for further training, that includes:
  - a) public expenses for further training as % of GDP
  - b) private expenses for further training as % of GDP
  - c) expenses of employers (small and middle business, large enterprises) for further training (as % of total labour cost)
- Monitoring of
  - a) educational structure of lecturers
  - b) participation of lecturers at their further training (for lecturers' skills)

**Conclusion - what lessons have been learned in your country in the context of this PLA that can be applicable to other European countries?**

In the context of PLA, it is important to re-emphasize the significance, status and possibilities of adult education for the development of individuals, families, communities, nations and countries in the spirit of their traditions and in connection with their history.

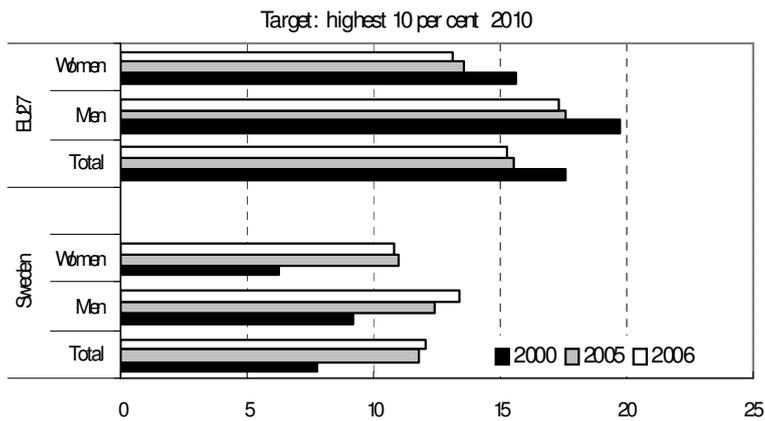
## SWEDEN

### Performance in relation to the benchmark on Participation in Lifelong Learning (25 – 64 years of age)



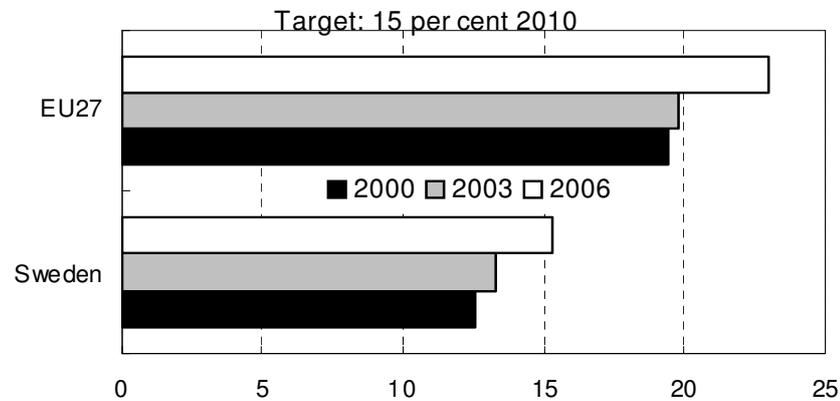
Source: Labour Force Survey, Eurostat.

### Performance in relation to the benchmark on early school leavers



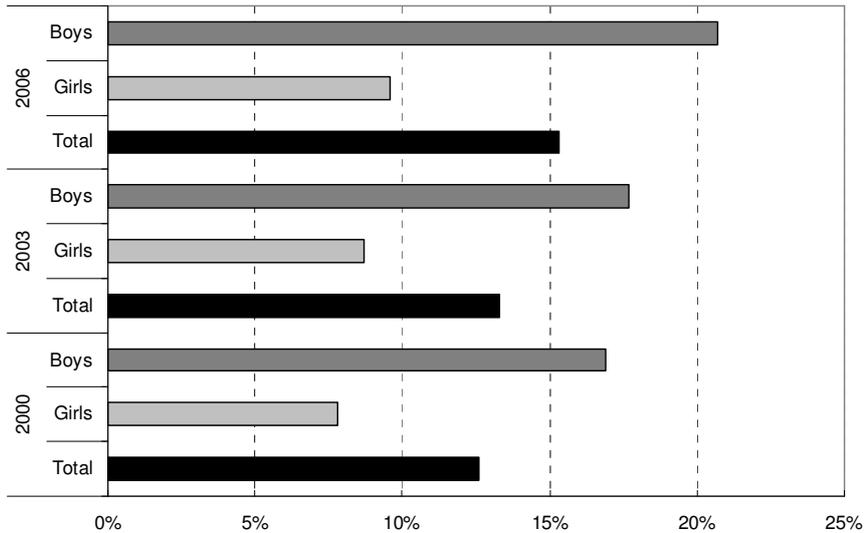
Source: Labour Force Survey, Eurostat.

### Performance in relation to the benchmark on low achievers in reading



Source: OECD/ PISA 2000, 2003, 2006.

### Low achievers in reading, Swedish results for boys, girls and total



Source: PISA 2000, 2003, 2006.

### Which are the policy measures taken to increase/decrease these 3 benchmarks, to improve the quality of adult learning staff and investment?

A priority is to bring together post upper secondary vocational education and training (outside higher education) in a common framework. The aim to ensure quality and national equivalence through uniform quality criteria and quality indicators for different forms of post secondary vocational education and training, to simplify the regulatory framework, increase transparency and improve the information available to students about the labour market. This common framework will be in force from the 1st of July 2009. The education and training provided will be designed to meet current competence needs in working life and is organised in close co-operation with the workplaces. A substantial part of the education and training is spent at a workplace, where active workplace learning and problem-solving in an overall educational context take place. Each course has a limited timeframe in order to be approved it should correspond to the actual requirements of the employment market.

In order to counteract a lack of vocational skills within the workforce the Government presents a three year initiative (2009-11) with targeted funding towards the municipals. The initiative will provide increased possibilities for vocational training within Municipal Adult Education and Training for those who either lack upper secondary qualifications or needs to complement their qualification. These relatively short courses should be provided in a flexible way and adapted to personal needs.

Swedish tuition for immigrants is included in lifelong learning. This education is an entitlement for every immigrant who has taken up residency in Sweden and who is not fluent in Danish or Norwegian. A new curriculum has been introduced from first of January 2009. With the aim of ensuring the educational quality on a national level standardised tests have also been introduced after each study path.

In the area of early school leavers there are preparations now underway for legislation within the upper secondary school. All upper secondary programmes would continue to last three years, with a common basic structure. However, the contents of each of the proposed 14 vocational programmes and five higher-education preparatory programmes would be more targeted than currently, notably by adapting the focus of common upper secondary subjects (Swedish, math, English, etc.) to what is relevant for each particular programme. This should allow vocational programmes to stretch further than today's upper secondary school, leading to a

vocational diploma that constitutes a recognised skill qualification and enhances employability.

Upper secondary education would then have three alternative routes:

- School-based vocational programmes. A third of the three years would be spent on common upper secondary subjects, individual options and a diploma project, with the remaining two thirds spent on specialisation. There would be 14 national programmes (building and construction; farming and natural resources; electricity and energy; aircraft; vehicle and transport; trade and administrative service; hairdressing and handicraft; hotel and tourism; manufacturing; children and preventive healthcare; restaurant and food; maritime; heating; water and sanitation; health and long-term care). In each of these programmes there would be two to five nationally-defined branches, and schools would have the option to include further specialised in-depth components for up to a third of the three-year programme duration. At least 15 weeks of workplace learning would be compulsory.
- Apprenticeships. These so-called upper secondary apprenticeships would be introduced in each of the 14 national programmes. Students would have the same common upper secondary subjects, individual options and diploma project as for school-based vocational programmes, but most or all of the two years' programme-specific learning would happen at a workplace.
- Higher-education preparatory programmes. There would be five national programmes (economics and business, arts and humanities, social science and media, natural science, technology), each with three to five nationally-defined branches.

There is a general improvement for the quality of staff. Since 2007 the government has a special stake, called "Lärarlyftet" on in-service training for qualified teachers. 2007-2011 the government will allocate SEK 3 billions into in-service training and other initiatives for teachers.

Focus on the in-service training is further developed in subjects and, include, didactic perspectives and skills. For taking part in the in-service training a teacher must be qualified and also employed by an official or independent school organiser. A teacher must be on leave of absence during the time he or she is studying. Teachers have 80 per cent of their salary during that time. The school organiser will pay a small part (30 per cent of the 80 per cent) of the salary and attendant costs like journeys, literature and substitute teacher. The government pays the courses and give a special state grant to each organiser who sends teachers to the in-service training.

#### **How and by who it is been measured?**

Statistics Sweden is responsible for the two first measures and the Swedish National Agency for Education is responsible for the third one (PISA). Statistics Sweden collects the information through the Labour Force Survey and reports it to Eurostat who is then responsible for the two first measures.

#### **Is there a management information system for providers and how does it function?**

No, there is no management information system for providers. However, the statistics are available in the Swedish official statistics presented by Swedish National Agency for Education.

#### **Is there any measurement on the quality of staff and providers?**

The Swedish National Agency for Education presents annual data over teachers in adult education i.e. Municipal adult education, Education for adults with learning disabilities, supplementary education and Swedish tuition for immigrants. The data illustrates for example the number of teachers and the proportion with teacher training. The Swedish National Agency for Education also presents annual data which describes differences between various principal organisers and other education organisers.

Swedish Schools Inspectorate performs targeted inspections to principal organisers and schools with the

objective to increase the quality of the education focused on pupils' knowledge results.

**Issues and trends - what are the gaps you identify and who are needed for a better monitoring of the sector?**

We identify that there is still a gap between men and women in all three indicators. The trends have been negative for early school leavers and low achievers in reading, particularly for the males.

## UNITED KINGDOM

NB: Skills is a devolved issue in the UK. Whilst some statements in this report apply for the whole of the UK most statements related to specific policy is applicable to England only.

### **Which are the policy measures taken to increase/decrease these 3 benchmarks, to improve the quality of adult learning staff and investment?**

- Participation in learning (25 – 64 years of age)

The Eurostat Adult Education Survey gives a useful indication of UK participation rates in education and training, at 49.3% for participation in formal and non-formal education and training. Only the Nordic countries have a higher participation rate. The UK's participation rate in formal learning is the highest from the countries surveyed as part of the pilot at 15.1%.

England has a range of measures aimed at increasing participation. These include promotional campaigns (e.g. television and other adverts), and working closely with employers to encourage them to support their employees to access training. We are also improving the advice and guidance that is available to individuals so that training is more accessible and it is easier for individuals to get the training that is best for them.

England does not have targets specifically relating to participation levels. Our targets relate to outcomes and so we measure the qualification levels of the population.

- Early school leavers

Record numbers of 16 year olds in England are in full time education and close to 9 in 10 are in some form of education and training. Participation in education and training is currently 90.8% for 16 year olds (the first year after compulsory schooling) and 82.4% for 17 year olds. We have a challenging aspiration of achieving 90 per cent participation at 17, which we are confident of achieving.

A major initiative to increase participation was launched through the UK Education and Skills Act 2008. This means that from 2013 it will be compulsory for all young people to continue in education or training until their 18th birthday. The participation can be in the form of full-time education, work-based training, or part time education or training.

There is significant economic benefit to the economy from all young people participating to 18, not just the current target of 90% participation. We estimate this to be around £2.4 billion for each cohort of young people. This benefit reflects the increase in wages and better job prospects that higher levels of qualifications and skills bring.

- Low achievers in reading

An estimated 5.2 million adults in England struggle with literacy. Our current 2008/09-2010/11 target is for an additional 597,000 people of working age to achieve a first Level 1 (or above) qualification in literacy (taking us to 89 per cent literacy).

We aim to support adults in improving their basic skills through our Skills for Life programme. This offers free literacy and numeracy courses to adults aged 16+ in England. Since 2001 5.7 million adults have enrolled on a Skills for Life course and over 2.25 million adults have gained a first qualification. We have invested over £5 billion in Skills for Life since 2001 and planned expenditure for the period 2007/08 to 2010/11 is £3.9 billion.

Skills for Life trainers have to have a specialism, such as literacy or numeracy. They must be trained in this

specialism to at least Level 4 and have a teaching qualification. We have set a target for all Skills for Life trainers to have achieved this standard or be working towards it by 2010.

Skills for Life participation and achievements are measured by the Learning and Skills Council, through the use of measures such as the Individual Learner Record, which is a unique number for every learner. We use the Labour Force survey to gauge overall qualification rate of the population.

- Workforce development

We also have a wider workforce strategy for the adult education sector. A significant proportion of adult learning is delivered through Further Education colleges. There are 372 Further Education Colleges in England. Private providers also play an important role in delivering adult education.

We are establishing the Framework for Excellence. This will set out how each further education college and provider is performing. It includes measures to support the recruitment, retention and training of the workforce.

We are supporting employers across the further education sector to improve the quality of leadership and teaching. We aim to require those working in the sector to hold a professional qualification.

Three new sets of Regulations came into force in September 2007 requiring:

- All newly appointed principals of FE colleges to hold or be working towards the Principals' Qualification.
- Mandatory qualifications for all new FE teachers entering the profession, based on new professional standards, including:
  - a. a Diploma leading to QTLS (Qualified Teacher Learning and Skills) status for those in full teaching roles; or
  - b. a Certificate leading to ATLS (Associate Teacher Learning and Skills) for those in limited teaching roles.
- All Further Education teachers are required to undertake a minimum amount of Continuing Professional Development per academic year and to be professionally registered with the Institute for Learning.

#### **Issues and trends - what are the gaps you identify and who are needed for a better monitoring of the sector?**

We are currently doing some work to look at how the sector can be better monitored. We are considering what we want to measure and how what we measure impacts on how we prioritise aspects of our skills strategy.

There are a number of challenges that we have identified in relation to the monitoring of the sector:

- How to understand the relationship between skills training and returns to the economy;
- How to understand the relationship between skills training and returns to individuals;
- How to identify the skills needs for the future; and
- How to handle the monitoring of training that does not lead to a full qualification (i.e. individual units or informal learning).

#### **Conclusion - what lessons have been learned in your country in the context of this PLA that can be applicable to other European countries?**

Our experience of monitoring the sector has highlighted the need to really understand what outcomes we want, what we measure to check progress towards achieving those outcomes, and the impact that what and how we measure having an impact on implementation of policies. We need to be careful that we understand the purpose of the monitoring rather than arranging monitoring systems around data just because that is the only comparable data available.

The UK has successfully focussed its policy on upskilling, to increase skill levels across the country. To assess progress we have measured first and full qualifications, and we can track improvements over time.

## **ANNEX 3: LIST OF PARTICIPANTS**

## **PLA Participants from the Member States, Liechtenstein and Norway**

1. Mrs. Brigitte Salfinger	Austria
2. Mrs. Ina Ilieva	Bulgaria
3. Mrs. Iliana Taneva	Bulgaria
4. Mrs Elsa Neophytou	Cyprus
5. Mrs Despina Charalambidou-Solomi	Cyprus
6. Mr Jan Bruha	Czech Republic
7. Mrs. H��l��ne Michaudon	France
8. Mrs. Patricia Di Stefano	France
9. Mrs. Renate Haas-Beck	Liechtenstein
10. Mrs. Vigdis Haugerud	Norway
11. Mrs. Anne Skomedal	Norway
12. Mrs. Cristina Duarte	Portugal
13. Mrs. Fernanda Ara��jo	Portugal
14. Mrs. Erika Ekstr��m	Sweden
15. Mr. Anders Borgstr��m	Sweden
16. Mr. Toon Janssen	The Netherlands
17. Mr. Loek Nieuwenhuis	The Netherlands
18. Mr. JD Carpentieri	UK/England
19. Mrs. Ann-Therese Farmer	UK/England

## **PLA Participants from the European Commission**

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