



## COMMISSION OF THE EUROPEAN COMMUNITIES

Brussels, 12.11.2007

SEC (2007) 1484

### COMMISSION STAFF WORKING DOCUMENT

**Accompanying document to the**

**COMMUNICATION FROM THE COMMISSION TO THE COUNCIL,  
THE EUROPEAN PARLIAMENT, THE EUROPEAN ECONOMIC AND SOCIAL  
COMMITTEE AND THE COMMITTEE OF THE REGIONS**

**"Delivering lifelong learning for knowledge, creativity and innovation"**

**Draft 2008 joint progress report of the Council and the Commission on the  
implementation of the "Education & Training 2010 Work Programme"**

**{COM(2007) 703 final}**

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## **1. INTRODUCTION**

This Commission staff working document accompanies the Commission Communication proposing the 2008 Joint Report on progress under the Education and Training 2010 work programme contributing to the European Union's Lisbon agenda for jobs and growth.

### **1.1. Context**

Every two years the Council and the Commission adopt a Joint Report on the implementation of the Education and Training 2010 work programme, including the field of higher education and the Copenhagen process in vocational education and training (VET). The next Joint Report will be adopted in February 2008. It will focus on the progress made by the 32 participating countries, particularly in putting in place coherent and comprehensive national lifelong learning strategies by the end of 2006. This ambition was set by the Council and the Commission in the 2004 Joint Report and endorsed by the 2005 European Council.

The Commission has drafted its contribution to the 2008 Joint Report primarily on the basis of a cross-country analysis of progress described in national reports received from the participating countries in the second quarter of 2007 which were prepared following Commission guidelines. This staff working document contains this analysis (chapters 2 to 6) and also reports on the implementation of the Education and Training 2010 work programme at the European level (chapter 7).

The 2008 Joint Report, to which this Staff Working Paper is annexed, should be read together with the 2007 Progress Report on Indicators and Benchmarks,<sup>1</sup> which is summarised in the statistical annex to the joint report.

### **1.2. Aims and objectives**

The main aims of this document are therefore:

- To describe the progress made since 2004/5 in the implementation of the Education and Training 2010 work programme at the national and European levels and to illustrate this progress with examples of recent developments.
- To compare the state of progress of national lifelong learning strategies, including an assessment of their comprehensiveness and coherence.
- To comment on the influence of the Education and Training 2010 work programme on the national lifelong learning strategies and other key policy areas (including the adoption of benchmarks and key transversal and European level issues).

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<sup>1</sup> SEC (2007) 1284 of 2.10.2007.

### **1.3. Status and caveats**

This document is based mainly on the synthesis of the 2007 national reports. Reference is however made to the 2005 national reports and other Commission knowledge on country progress is cited in selected places. In practice, the 2007 reports tend to refer to developments in 2006 and the 2005 reports to developments up until 2004.

The reports have provided relatively little information that allows specific quantitative assessments of the progress made between 2005 and 2007.

The information provided in the 2007 national reports on specific measures within the national lifelong learning strategies is often not detailed and the examples cited in the report have been chosen to illustrate the progress being made, rather than as examples of good or best practice.

### **1.4. Report structure**

The structure of the report closely reflects the structure of the 2007 national reports, which themselves reflect the guidelines provided by the Commission.

Chapter 2 describes the progress of NATIONAL LIFELONG LEARNING STRATEGIES in particular: the state of progress; the comprehensiveness: levels and systems covered by strategies; their coherence; flexible pathways and transition points; and partnership, implementation and dissemination arrangements. It concludes with an assessment of the state of play of the national strategies and outstanding challenges.

Chapter 3 describes the progress relative to TRANSVERSAL POLICY OBJECTIVES in particular: National Qualification Systems; non-formal and informal learning; lifelong guidance; and transnational mobility.

Chapter 4 assesses progress at the level of SCHOOLS, more specifically: modernising curricula and assessment arrangements; quality assurance; teachers' learning and training needs; school leadership, school governance; stakeholder consultation and cooperation, learning partnerships; widening access and improving equity of participation; gender issues; pre-primary education; private investment and progress towards EU benchmarks.

Chapter 5 assesses progress at the level of HIGHER EDUCATION, in particular: governance and leadership; private investment; widening access and improving equity; gender issues; learning outcomes based approaches; quality assurance; learning partnerships; knowledge triangle; participation targets and associated measures; measures to increase excellence; and measures to increase the number of maths, science and technology graduates.

Chapter 6 assesses progress at the levels of VOCATIONAL EDUCATION AND TRAINING AND ADULT EDUCATION, more specifically: increasing quality and attractiveness of VET / adult learning; quality assurance; relevance of curricula and qualifications to labour market needs; pathways to further and higher education; learning outcomes based approaches; learning and training needs of teachers and trainers; learning

partnerships; social partner involvement; widening access and improving equity; gender issues; opportunities for disadvantaged groups; and, increasing adult participation in lifelong learning; gender issues; increasing participation in lifelong learning; governance and leadership and private investment.

Chapter 7 provides an overview of the IMPLEMENTATION OF THE EDUCATION AND TRAINING 2010 WORK PROGRAMME AT EU LEVEL since the 2006 Joint Report in terms of coordination, monitoring and dissemination and the state of play in relation to the priority areas of the work programme.

### **1.5. Education and Training 2010 and the Lisbon Strategy**

Over the last five years the Education and Training 2010 work programme has, as the open method of coordination in this field, made a vital contribution towards achieving the main objectives of the Lisbon Strategy.

The Education Council adopted for the first time in 2001 the future objectives in terms of quality, accessibility and openness of education and training systems, to be achieved in practice by 2010. These objectives were followed-up in 2002 by a detailed work programme. In 2002 it also adopted a resolution committing the Member States and the European Union to developing national lifelong learning strategies. The Copenhagen process was launched in 2002 by the Ministers responsible for vocational education and training in cooperation with the social partners and the European Commission, with a view to improving cooperation in the field of vocational education and training.

The Education and Training 2010 work programme incorporates these various policy orientations and the implementation of the Mobility Recommendation and Action Plan. It also takes into account the outcomes of the Bologna process in the field of higher education. It establishes cooperation between 32 countries and involves different stakeholders, including social partners and international organisations. It covers all learning contexts (formal, non-formal and informal) and levels (pre-primary, primary, secondary, higher, adult education and continuing training) of education and training within a lifelong learning perspective.

The conclusions from the spring 2006 European Council underline that education and training are critical factors in developing the EU's long-term potential for competitiveness as well as social cohesion and reiterate that “investments in education and training produce high returns which substantially outweigh the costs and reach far beyond 2010”. Further to this the conclusions from the spring 2007 European Council describe education and training as prerequisites for a well-functioning knowledge triangle (education - research - innovation) which play a key role in boosting growth and jobs and acknowledge that “good progress has been made in implementing the Education and Training 2010 work programme over the last 12 months”.

#### *1.5.1. Education and training and the 2006 Lisbon integrated reporting*

The European Council and the Commission have both emphasised the Education and Training 2010 work programme as a major contribution to the overall Lisbon strategy,

and more generally as the means by which Member States will achieve the broad common objectives they have fixed for their education and training systems. Education and training has therefore maintained its separate two-yearly reporting mechanism which is complementary to, and feeds into the Lisbon integrated reporting cycle, including the implementation of the Youth Pact, in close cooperation with the employment, social inclusion, youth and research sectors.

The overall Lisbon reporting cycle is based on an integrated guidelines package for jobs and growth, national and EU Lisbon Action Programmes, and a single progress report to the European Council. The integrated guidelines for jobs and growth includes two guidelines for education and training (number 23 and 24), which reflect the priorities of the Education and Training 2010 work programme, focussing on the need to expand and improve investment in human capital, and to adapt education and training systems to new competency requirements.

The position of education and training within the Lisbon Strategy has been further enhanced by Member States since 2006. The vast majority of Member States give great importance to education and training, lifelong learning and skills development in their Lisbon National Reform Programmes 2005-2008. Member State's 2006 implementation reports displayed a good level of overall implementation. However, many measures are still in their initial phase and only 4 Member States reported on the steps undertaken to put lifelong learning strategies in place by 2006.

In spring 2007, the Council issued recommendations based on articles 99 and 128 of the Treaty, and on the integrated Lisbon guidelines 2005-2008. The Council issued recommendations for more than half of the Member States relating to education and training, lifelong learning and skills development. In half of these cases, the recommendations address the need for further reforms of national education and training systems (e.g. reducing the number of early school leavers, reforming VET systems, developing lifelong learning strategies, implementing spending targets). In the other cases, the recommendations address skills issues linked specifically to labour market needs and labour supply: e.g. training of older workers, skills levels of disadvantaged groups such as migrants.

#### *1.5.2. Education and training and the 2006 Social Inclusion and Social Protection process*

The 2006-2008 National Action Plans (NAPs) on strategies for social protection and social inclusion underline the key role of education and training for employability and social inclusion. Almost all NAPs envisage preventative and compensatory measures against early school leaving. Many Member States concentrate resources on a variety of activities including: disadvantaged regions or schools; pre-primary education; and strategies to tackle the educational disadvantages of people with migration backgrounds. All NAPs recognise vocational training as a tool for vulnerable groups to access the labour market. The NAPs recognise the importance of adult participation in lifelong learning and focus on the acquisition of basic skills. On disabilities and special needs, the debate on special schools versus special needs education in mainstream schools remains open.



## 2. NATIONAL LIFELONG LEARNING STRATEGIES

Member States' commitment to develop and implement coherent and comprehensive lifelong learning strategies is based on the conclusions of the Feira European Council in June 2000<sup>2</sup> and the Council resolution on lifelong learning of June 2002. The 2004 Joint Report added that coherent and comprehensive lifelong learning strategies should be in place by the end of 2006, and the goal to develop such strategies was also reiterated by the 2005 Spring European Council.

This chapter examines progress towards developing and implementing national lifelong learning strategies and highlights the features of a coherent and comprehensive lifelong learning strategy identified in Text Box 2.1, which are based on the Commission Communication on "Making a European area of lifelong learning a reality".<sup>3</sup> The chapter concludes by identifying the state of play of these strategies, and outstanding challenges.

### **Text Box 2.1 Key features of a coherent and comprehensive lifelong learning strategy**

*Lifelong learning should be viewed as an overarching concept covering all contexts (formal, non-formal, informal) and levels (pre-school, primary, secondary, tertiary, adult, continuing) of education and training.*

*A lifelong learning strategy should be an overall framework for education and training policies containing a strategic overview and a coherent set of priorities and the necessary allocation of resources for targeted policy measures. It should be evidence-based.*

*A lifelong learning strategy should include flexible learning pathways and effective transition points between all systems and levels of education and training in order to avoid dead-ends.*

*Lifelong learning strategies should build on partnerships with all relevant stakeholders (including policy makers at national, regional and local levels, social partners, learners and representatives of civil society) and must include the necessary implementation and dissemination arrangements.*

Source: Guidance note<sup>4</sup>

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<sup>2</sup> See paragraph 33 of the presidency conclusions of the European Council meeting in Santa Maria de Feira, 19 and 20 June 2000.

<sup>3</sup> COM(2001)678 final.

<sup>4</sup> European Commission, DG Education and Culture, December 2006, Preparation of the 2008 Joint Interim Report on the implementation of the Education and Training 2010 work programme, Guidance Note for the 2007 national reports (p. 3).

## 2.1. Progress in adopting national lifelong learning strategy statements

To date, a total of 17 countries have adopted overarching lifelong learning strategy statements of some type covering different education and training sectors (**AT**, **BE fr** and **nl**, **CZ**, **DE**, **DK**, **EE**, **EL**, **ES**, **FI**, **HR**, **HU**, **LT**, **LV**, **NO**, **SE**, **SK**, **UK**<sup>5</sup>). The majority have developed or reviewed documents during the past two years, i.e. since the adoption of the last Joint Report.

The nature of the adopted documents varies. The majority of the countries mentioned above have prepared specific documents setting out their lifelong learning strategies. The approach followed in Belgium (**BE fr** and **nl**) and **Finland** differs insofar as in these cases lifelong learning policies are defined in the respective governments' programmes. **Spain** set out its strategy in the Lisbon national reform programme and has, as well as **Greece**, also framework legislation in place. In **Croatia**, principles of lifelong learning are laid down in the 2005 - 2010 Education Sector Development Plan. **Lithuania's** approach is defined in the State Education Strategy 2003-2012.

The strategy documents also vary in the sense that some focus on providing a conceptual framework (**DE**, **SE**), while others are more operational in terms of identifying main challenges and developing related policy measures (**AT**, **DK**, **HU**, **LT**, **NO**).

Eight countries were still preparing overarching strategy statements (**BG**, **CY**, **IE**, **MT**, **PL**, **RO**, **SI**, **TR**).

Seven countries (**FR**, **IT**, **LI**, **LU**, **NL**, **PT**, **IS**) pursue lifelong learning policies but do not have overarching lifelong learning strategy documents encompassing all the different policy areas in question. The reports submitted by these countries identify lifelong learning as a general principle underpinning education and training policy and provide examples of relevant legislation and measures.

## 2.2. Levels and systems covered in national lifelong learning strategies

In most cases all levels (pre-school, primary, secondary, tertiary, adult, continuing) and all contexts (formal, non-formal and informal) of education and training are covered in the national lifelong learning strategies, based on the information available in the national reports.

However, there is some evidence of possible issues in relation to the coverage of these strategies. **Latvia**, **Estonia**, **Greece** and **Poland** for example approached it before, example, focus strongly on the adult education sector and in the case of **Greece** this is together with an emphasis on initial and continuing vocational education and training.

Many of the strategies appear to focus predominantly on formal education and training systems and do not highlight the importance and status of non-formal and informal learning. The **Lithuanian** national report however identifies the development of non-

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<sup>5</sup> Strategies are in place in the devolved administrations in England, Scotland, Wales and Northern Ireland

formal and non-vocational adult education as a priority in the further development of its national lifelong learning strategy. Also the **Polish** report identifies the dominant position of the formal education sector as a barrier for the development of a comprehensive strategy; **BE nl** and **RO** stress the need to introduce qualifications frameworks to integrate non-formal learning.

Examples of other priority issues include: an emphasis on early/pre-school education (**AT**, **BE nl**, **BG**, **CY**, **ES**, **NO**, **PT**) and youth provision (**IE**); a focus on further (**LV**) and adult education (**EE**, **EL**, **LU**); a focus on the needs of the labour market (**BE fr** and **nl**, **EL**, **SK**); and a focus on enhancing vocational education and training (**EL**), including the introduction of second chance schools (**EL**, **LV**).

Several of the national reports point to the need to address issues linked to systems development as part of the challenges they face in implementing their strategies. The types of issues highlighted include: the need to ensure that the legislative basis exists to provide state responsibility for lifelong learning (**LV**); cohesion between pathways (**HU**), the introduction of competence based approaches to learning (**PL**); improving the quality of the education and training system (**CY**); and the need to improve access to education and training and to have a system that can accommodate all learners, irrespective of ability or disadvantage (**CY**, **DK**, **IE**).

## 2.3. Coherence

### 2.3.1. *The use of evidence to inform LLL strategy challenges and priorities*

The national reports present the evidence used to inform the challenges and priorities identified in their national strategies in different ways: some make explicit reference to research, data and policy and strategy documents (**AT**, **BE fr** and **nl**, **BG**, **CY**, **CZ**, **DK**, **EL**, **HU**, **IS**, **IT**, **LT**, **LU**, **MT**, **NL**, **PT**, **RO**, **SI**, **SK**, **TR**, **UK**); some present statistical evidence to underpin the challenges (**BG**, **EE**, **FI**, **HR**, **NL**); for others the evidence is not cited (**ES**, **FR**, **IE**, **LV**, **PL**, **SE**) though the articulation of the challenges and priorities appears to be evidence based.

Several of the 2007 national reports identify the need to build or consolidate an evaluation culture to support the evidence base of national lifelong learning strategies (**BG**, **CY**, **ES**, **IE**, **TR**).

In some countries, such as the **United Kingdom**, there is strong culture of evidence based policy making (Text Box 2.4). In others, such as **Germany**, the development of a culture of evaluation and evidence based policy making is a more recent priority in the area of education and training and highlighted in the national report (Text Box 2.5). In **Ireland**, the developing evaluation culture is being driven by value for money and expenditure reviews.

The **Hungarian** and **Greek** national reports both refer to the use of the National Development Plans (NDP) and Operational Programmes (OP) developed in the context of the structural funds programming process as a basis for assessing and measuring performance. The lessons learned from NDP I in **Hungary** are being used to inform the

development of an evaluation culture. Similarly in **Greece** and **Poland** the OP for Education and Vocational Training has been used to promote evidence based actions through the systemic evaluation and further development of the relevant measures.

Various types of institutions are being established to take responsibility for the development of the evidence base for lifelong learning strategies. The National Agency for Vocational Education and Training in **Bulgaria** has been given the responsibility to “establish a culture of quality evaluation and self evaluation” and a new centre for Educational Research and Evaluation will be set up in **Cyprus**.

In **Lithuania** an education management system is being developed as a means for collecting and processing information to inform evaluation. This system is complemented by research on various aspects of education.<sup>6</sup>

Several of the national reports emphasise the benefits of participating in international studies (e.g. PISA and TALIS) to benchmark their position against other countries, identify areas where further actions and measures are required, share experiences and learn from good practices (**BG, DE, ES, IT, LT, LU, PL, SE**).

#### **Text Box 2.2 UK – Key components of evidence based policy making**

- *Administrative data: the School Census, which collects personal and achievement data annually on every pupil aged 5-16, and the Individualised Learner Record in further education, are powerful tools for understanding progression, identifying weaknesses in provision and systems. Such evidence has been used to inform curriculum change to ensure that every individual is achieving at his or her full potential.*
- *Commissioned research: Government Departments and the Devolved Administrations commission research directly to inform practice across the whole range of lifelong learning. Recent decisions to expand pre-school education, for example, results directly from studies which reveal the impact of early years development on social inclusion and educational performance.*
- *Directly funded but independent research centres: six centres funded by the Government in England to investigate specific policy related areas of education and training, including wider benefits of learning, economics, basic education and systematic literature reviews.*
- *Collaboration with Research Councils: Government works closely with the independent national Research Councils to encourage academic research in key policy areas.*
- *Dissemination: Governments across the UK actively disseminate research findings to*

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<sup>6</sup> Also other national reports identify that research is being conducted without however detailing the nature of the research (**BE nl, EE**).

*the media, the public and the research and policy community. In England, a conference for academic researchers and the policy community is held annually to disseminate findings and inform policy.*

*Adapted from the UK national report (2007) pp 4-5.*

### **Text Box 2.3 Germany – strengthening the evidence base for lifelong learning**

*Activities to strengthen the lifelong learning evidence base have a central role in the German national report and operate at different levels with the aim of developing a powerful empirical system for education research. In 2007 a federal framework programme for to strengthen education research is being introduced which follows the introduction of new evaluation systems for pre-school and school level education. These activities are complemented by the development of education statistics, the introduction of a regular programme of evaluation in schools and comparative international research.*

#### *2.3.2. The allocation of resources linked to lifelong learning*

Apart from some exceptions, the 2007 national reports do not provide detailed or comparable information on the allocation of resources to the main policy measures identified in the national lifelong learning strategies<sup>7</sup>.

However, between 2000 and 2003 public expenditure on education as a proportion of GDP has rose in EU Member States: the EU average increased from 4.68 per cent in 2000 to 5.17 per cent in 2003. In 2004 the upward trend stopped and there was a slight decline compared to the year before (5.09%). Expenditure on education as a proportion of GDP however still increased in eight countries, notably in **Bulgaria** and **Greece**. The available data show strong differences in spending levels between countries. **Denmark** and **Sweden** spend over 7% of GDP on education; while some Member States spend less than 4% of GDP (spending is however increasing in these countries).

Expenditure on educational institutions from private sources as a percentage of GDP has increased slightly since 2000 but progress slowed down in 2004. It now stands at slightly more than 0.6% of GDP. Only **CY**, **DE**, **LV**, **SI** and **UK** have levels of private spending close to or above 1% of GDP.

The EU Structural Funds play an important role in co-funding education and training. The Structural Funds in general (**AT**, **BE**, **fr**, **BG**, **EE**, **FR**, **IT**, **LV**, **LU**, **MT**, **SI**, **SK**, **UK**) and specific Operational Programmes (**BG**, **CZ**, **EL**, **HU**, **PL**) are mentioned in a number of national reports. **Greece** emphasises that there is a strong link between the funding allocations within the Operational Programmes and the challenges faced in the implementation of its lifelong learning legislation. **Italy** underlines the contribution of

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<sup>7</sup> Budgetary data in some form, such as national government funding and / or EU funding on education and training in general or individual projects/measures has been provided for just over half of the countries. The type and format of information provided varies from country to country.

the structural funds programming process to the definition of national policy priorities and objectives. Phare and other accession country funding sources are mentioned, in for example the **Bulgarian** and **Croatian** reports.

### 2.3.3. *The targeting of policy measures on making progress on EU benchmarks*

The 2007 national reports make reference to measures linked to the achievement of E&T 2010 benchmarks, which are:

- Reading literacy – at least 20% fewer low achieving 15 year olds than in 2000
- Early school leaving: no more than 10%.
- Upper secondary completion: at least 85% of 22 year olds
- Maths, science and technology (MST): at least 15% more graduates than in 2000 and better gender balance
- Lifelong learning participation: at least 12.5% of 25-64 year olds

In **Hungary**, **Spain** and **Greece** working groups have been put in place to monitor the implementation of the EU benchmarks. The **Hungarian** report indicates that this move towards monitoring is a major step as there is no tradition of using indicators in policy development and governance. The **Spanish** working groups are coordinated with representatives from the autonomous regions. In **Estonia** the benchmarks are providing a framework for strategic and financial planning.

20 countries report on national targets linked to one or more of the EU 2010 benchmarks in their Education and Training 2010 national reports or Lisbon National Reform Programmes 2005-2008 (**BE, DK, EE, EL, ES, FI, FR, HR, HU, IE, LT, LV, MT, NL, PL, PT, RO, SI, SK, UK**). 11 countries do not report on having set specific national targets linked to the EU 2010 benchmarks (**AT, BG, CY, CZ, DE, IT, LU, NO, SE, IS, TR** see table below).

The **UK** report identifies national targets to improve the basic skills levels and general qualifications levels of the adult population which are based on learning outcomes.

**Table 2.1 National targets related to the EU benchmarks for 2010:**

	<i>Low achievers Reading literacy</i>	<i>Early-School leavers (18-24)</i>	<i>Secondary attainment (20-24)</i>	<i>MST</i>	<i>Adult participation in LLL (25-64)</i>	<i>Other</i>
<b>AT</b>		No	No		No	
<b>BE</b>		10%	85%		12.5%	Full participation in third year of pre-primary (BE nl); spending at least EU average
<b>BG</b>		No	No		No	
<b>CY</b>		No	No		No	
<b>CZ</b>		No	No		No	
<b>DE</b>		No	No		No	40% of an age group to start tertiary education
<b>DK</b>			85% (of overall population) by 2010 and 95% by 2015			50% of a cohort to complete tertiary education (by 2015)
<b>EE</b>	Be in first third of countries	10% by 2014	85%	15% more	10% by 2008, 11.5% by 2013	
<b>EL</b>	20% fewer	10%	85%	15% more	12.5%	
<b>ES</b>	15% fewer	15%	80%	15% more	12.5%	Spending: reach EU average; pre-primary: full participation of 3-6 olds; HE: increase completion rate ISCED 5b up to 25%.
<b>FI</b>		No	90% of 25-29 olds by 2015		60%	50% of 30-34 olds to have a higher education degree (by 2015) in 2008 97% of young people finishing comprehensive school to start upper secondary or other schooling (97.5% in 2009)
<b>FR</b>		No	85%		No	50% to complete tertiary education (by 2010)
<b>HU</b>	10%	19%	86%	15% more	8% by 2013	
<b>IE</b>		No	90% by 2013		No	
<b>IT</b>		No	No		No	Benchmarks adopted in structural funds operational programmes, in particular for the south of Italy
<b>LT</b>	20% fewer by 2012	9% by 2012	90% by 2012		11% by 2013	Participation in pre-primary: 60% of age 1-6

						and 90% of age 5-6; spending: 6% of GDP (all by 2012).
<b>LU</b>		No	No		No	
<b>LV</b>		No	85%		15%	
<b>MT</b>		35%	65%		7%	
<b>NL</b>	9%	8%	85%		20%	80% of 25-65 olds to have a basic professional qualification (by 2010).
<b>PL</b>	15.2% by 2013	5% by 2008	90% by 2008	22% by 2013 (females 13%, males 31%)	6,5% by 2008	Participation in tertiary education (age 19-24): 40% by 2008; participation of 3-5 years old in pre-primary in rural areas: 30% by 2013; Low achievers mathematics literacy 17.8% by 2013
<b>PT</b>		21.3% (-50%)	65%		12.5%	
<b>RO</b>		Yearly decrease	75%	15%, 50% gender imbalance reduction	7%	Pre-primary: 80%; tertiary attainment: 12% of population; 80% of adults with upper-secondary education
<b>SE</b>		No	No		No	
<b>SI</b>		No	85% for 25-64 olds		15%	
<b>SK</b>		No	No		15% by 2015	
<b>UK</b>	See "other"	See "other"	90% by 2015; see also "other"	See "other"	See "other"	Reduce the proportion of young people not in education, employment or training by 2 percentage points by 2010. (England); 93% of 16-18 year olds in education, employment or training by 2010 (Wales); 50% of 18-30 years old in HE by 2010 (England); improve basic skills of 2.25 Mio. adults 2010-2010; National targets defined in terms of learning outcomes relevant to all five columns.
<b>HR</b>			75% by 2010			
<b>IS</b>		No		No	No	
<b>LI</b>	<i>Not applicable because no data available</i>					
<b>NO</b>		No		No	No	
<b>TR</b>		No		No	No	



Apart from the issue of monitoring performance in relation to the benchmarks, two of the national reports, **Cyprus** and **Croatia**, stand out as having identified a wide range of concrete measures linked to improving actual performance in the benchmark areas (Text Boxes 2.2 and 2.3). In addition, there are a number of cases where countries provide information about individual measures in those chapters of their national reports dealing with individual education sectors, notably schools, but do not provide information about the role of the benchmarks related to the strategy itself (**BE nl, BG, FR, LI, NO, SI**).

#### **Text Box 2.4 Cyprus - Recent measures towards achieving E&T 2010 benchmarks**

*Increase numbers of maths, science and technology graduates*

- *Establishment of a new technological university and the introduction of a new engineering school at the University of Cyprus.*
- *The introduction of a new open university and private universities.*

*Increase participation of adults in lifelong learning*

- *Upgrade the skills and competences of people in work in order to increase their employability and meet the needs of the economy*
- *Provide opportunities for basic skills and entrepreneurship training for economically inactive adults.*
- *Extend the scope of programmes offered by Adult Education Centres to enhance active citizenship, civic education, build occupational skills (language and computer literacy)*

*Reduce early school leavers*

- *Special education programmes for pupils with learning difficulties*
- *Offer support from school psychologists*
- *Operate second chance schools*
- *Introduce compulsory pre-primary education (but without specifying age)*
- *Provide financial support for students in tertiary education*
- *Redesign the apprenticeship system in order to offer young people an alternative form of training to contribute to their personal development and meet the needs of the labour market*

#### **Text Box 2.5 Croatia - Recent measures towards achieving E&T 2010 benchmarks**

*Increase the rates of reading literacy*

- *A sample of students participated in the OECD's Programme for International Student Assessment (PISA) for the first time in 2006. The results are anticipated in December 2007, hence will provide a measure of reading literacy against which future performance will be assessed*

*Increase the completion rate in secondary education / increase the population with upper secondary education*

- *Promote flexible secondary education using "bridging programmes" to allow students to switch between general and vocational education*
- *Prepare for the introduction of compulsory secondary education*
- *Free transport to school*
- *Extension of state support for adults who want to complete their secondary education.*

*Increase adult participation in lifelong learning*

- *Promote lifelong learning and develop a system in which credits can be accumulated across a person's entire life*
- *Develop a system of professional information and counselling services in order to provide education and training for people who did not complete primary and secondary education*
- *Training for people with low levels of literacy, numeracy and vocational skills to improve their employability*

*Reduce early school leavers*

- *Increase enrolment rates in pre-primary education.*
- *Introduce Roma teaching assistants*

*2.3.4 The targeting of policy measures on disadvantaged groups*

The 2006 Commission Communication on efficiency and equity of education and training systems<sup>8</sup> and the subsequent Council conclusions<sup>9</sup> underlined the economic benefits of improving access for all to quality education. They highlighted in particular that efficiency and equity are mutually reinforcing policy goals in education and training. Equity considerations deserve particular attention as the available evidence shows that education and training can be key vehicles to reduce inequalities and social exclusion, but that they may also contribute to their perpetuation. The evidence shows that the impact of socio-economic conditions on educational outcomes can actually be positively influenced by educational policies and approaches. The Communication and conclusions also showed that equity issues concern all levels of education and training and that they thus need to be tackled in a lifelong learning perspective.

The issue of educational disadvantage actually raises significant concerns in most countries. Consequently, all 2007 national reports acknowledge the importance of this dimension and cite measures targeted at disadvantaged groups which address the key challenges of inclusion and integration.

Reports that discuss targeting the needs of disadvantaged groups in general terms stress: the importance of education and training as a means of facilitating socio-economic insertion (**AT**, **BE** **fr** and **nl**, **IE**, **NL**, **UK**); the gradual development of educational equity (**FI**); and, the development of strategies to facilitate the integration of excluded groups (**EE**).

In the **UK** social inclusion is a key element underpinning the Public Sector Agreement (PSA) targets for education in England. Nine of the 14 targets directly address aspects of social inclusion while the remaining five targets aim to ensure that students have the skills to participate fully in the economy. The promotion of social inclusion through education underpins the new Education Act in **Spain**. In **Ireland**, the DEIS action plan for educational inclusion supports schools in disadvantaged areas and their communities,

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<sup>8</sup> COM(2006)481 of 8.9.2006

<sup>9</sup> OJ C 298 of 8.12.2006, p.3.

in order to achieve greater equality in terms of educational participation, and outcomes in line with national norms

The integration of people with disabilities and special educational needs is a key feature of the measures to support disadvantaged groups in almost all of the 2007 national reports. The measures identified are frequently orientated towards the integration of children with disabilities and/or special educational needs into mainstream education, for example by providing improved physical access (**EE, HR**), guidance (**IS**), special needs learning assistants (**MT**) and equipment to allow them to integrate (**FR, LT, LU**).

Also the challenges of demographic change, including both ageing and migration issues, feature strongly in the measures concerning disadvantaged groups. The need to engage with and encourage older people to participate in education and training is recognised in a number of the national reports (**LV, RO, SI, TR**). Measures identified concerning migration include linguistic support; either in general terms (**CY, CZ, DE, EE, ES, FR, HR, HU, IE, PL, TR**) or targeted support orientated towards:

- Adults, typically to facilitate labour market integration (**DK, PT, IS**). In **Denmark** a course in “labour market Danish” will be developed shortly. Other **DK** activities are targeted at the integration of young people and other unemployed adults who have not completed compulsory education and training to participate in “new chance for all” measures.
- The children of immigrants to help them integrate into mainstream education (**AT, LT, LU, SI, IS**). The **Czech Republic's** lifelong learning strategy makes reference to extending pre-school education as a means of facilitating integration for children from socially and ethnically disadvantaged backgrounds. The emphasis in this support is on encouraging socialising, language teaching, and providing opportunities for participating in activities which children do not have the opportunity to do at home

In some cases linguistic support also helps minority communities, such as Roma communities, participate in education and training (**HR, HU, ES, PL, SI**). In **Spain** for example, linguistic support measures have been combined with measures to engage with Roma women to get them involved in school communities and work to help them play a role in educating their children. In **Hungary**, the need to improve quality for all is emphasised especially in relation to areas with a large Roma community.

The **Portuguese** "Plan for the integration of migrants" includes measures such as the involvement of mediators in schools, reinforcement of the services provided by national centres for the support of migrants, and programmes supporting employment and entrepreneurship.

Other measures to support disadvantaged groups, identified in the national reports include:

- Support for unemployed people in general (**LV, TR**) as well as particular support to help develop their labour market skills (**DK**)

- Support for people with low level basic skills – literacy support and mechanisms for screening literacy support needs are identified (**AT, BE fr and nl, CY, DK, EL**)
- Support for people with low level skills (**RO**) or education (**SE**), as well as soft skills and basic / key competences (**EL, LV**)
- The delivery of programmes in rehabilitation centres, e.g. prisons (**EE, LV**)
- Support targeting specific geographical areas, e.g., educational priority zones (**CY**) or removing barriers to participation in education and training for people living in isolated rural areas (**PL, RO, TR**);
- Transport support to allow people to access education (**LV**).

Some countries also refer to difficulties in implementing such measures. For example, a legislative framework for lifelong learning needs to be put in place in **Latvia** to ensure state responsibility and resources for lifelong learning targeting excluded groups. A number of national reports also indicated that measures to engage with minority and other disadvantaged groups have been less successful than anticipated (**BE fr, BG, LT, SK**).

### *2.3.5 The targeting of policy measures on changing attitudes to learning*

Several 2007 national reports indicate measures to help change attitudes towards learning, and thus increase the demand for learning and participation in lifelong learning (**CZ, DE, EE, HU, MT, PT, SK**). The measures include: engaging with parents and carers to ensure that children access, participate in and benefit from learning opportunities; opening up access to learning opportunities by making education and training provision more attractive and relevant; and, media campaigns to attract people into education and training.

Measures are being introduced to encourage parents to ensure that children engage with learning at the pre-school level and make the pre-school experience a positive experience (**SI**). Pre-school support for six year olds begins in **Estonia** in 2008 with the aim of developing positive attitudes towards learning and preparing children for school. A national strategy for pre-school education is being introduced in **Romania** (see also section 4.10). More broadly, in the **UK** (England) a parental engagement strategy “Every Parent Matters” has been prepared which seeks to involve parents in their children’s education.

In terms of opening and improving access to education and training opportunities a range of measures are being introduced at different levels. At the school level, reforms concern: making teaching and learning (**BG, ES, FI**) and the learning environment more attractive (**CY, FI**); tailoring activities to pupils’ interests and responding to pupils’ needs (**CY, HR**); the introduction of measures to address disorderly conduct (**LU**); and, providing support to students who are not realising their educational goals (**SE**).

Curricula reform measures are a key part of making learning more attractive. Measures introduced emphasise: learning to learn (**CZ, FI**); helping students make independent choices and establish linkages between subjects learned and real life (**EE**); modularisation of training curricula combining procedural and factual knowledge (**EL**); and, adopting a student centred approach (**TR**). Curricula reform is typically accompanied by updating teaching aids and text books and teacher training to support the new curricula. The introduction and use of information and communication technology (ICT) in the learning environment was emphasised in both the **Croatian** and **Turkish** national reports.

Important complementary measures to influence attitudes to learning are mentioned in some national reports, including: guidance and counselling support (**AT, EE, IE, LU, LV, UK**); measures to remove barriers to access such as improving the validation of non-formal and informal learning (**DE, EE, RO, SK**); the development of e-learning strategies (**EE, IT**); and, childcare support to encourage people on welfare programmes to access education while retaining their benefits (**IE**).

Media campaigns and public debate were identified as a means of changing public attitudes towards lifelong learning (**AT, BG, PT, RO, UK**). Media campaigns are also cited as a means of increasing awareness of education and training opportunities. Adult learners / adult education weeks have taken place in a number of countries for five years or more (**EE, FI, SE, UK**) to ‘spread the message’ of the value of lifelong learning (**LT**).

## 2.4. Flexible pathways and transition points

Establishing flexible learning pathways should enable individuals to progress within and across different learning contexts (formal, non-formal or informal) and different education and training types (general education, initial and continuing vocational education and training (VET), higher education (HE)). Flexible learning pathways enable learners to rejoin education and training at any stage of their life and to fully use all the learning outcomes acquired in view of a more individualised learning approach.

Many countries have recognised flexible learning pathways as a priority in their lifelong learning strategies (**AT, BE fr, CZ, DE, DK, EE, EL, ES, IE, IS, NO, PL, SE, SI, SK, UK**). However, the types of actions developed as well as their scope vary. In addition, countries focus on very different transition points. While some target young people still in initial education and their possibilities of progression, others are focusing on adults.

Generally, two types of measures are recognised in the national lifelong learning strategies, those focusing on transition points within formal systems and those focusing on transition points towards formal systems.

### 2.4.1 Measures which allow transfer between different types of education and training

A number of countries described measures which are developing mechanisms that facilitate the transfer between different types of education and training. For example **Spain** prioritises the facilitation of “paths between the different stages of formal education particularly between academic and professional studies at post-compulsory

stages”. Some countries have established progression routes from VET to HE (AT, CY, CZ, FR, IE, NL, NO, SE, UK) and others are implementing measures to improve them (e.g. EL, IT, IS). Most of these measures focus on pathways from upper-secondary VET to HE while fewer measures have been developed to pass from post-secondary VET to general HE. While an open system of lifelong learning is still an ambition in most countries, progress is being made in this direction, in particular in the context of the development of national qualification frameworks (see section 3.1 for details).

#### *2.4.2 Measures to enable validation of learning outcomes from non-formal and informal learning*

The transfer from non-formal and informal learning to the formal context is less well established than pathways between education types. Validation of non-formal and informal learning is still a relatively new concept for many countries, where the acquisition of learning outcomes and ultimately of qualifications is still closely linked to the formal learning process. This situation is gradually changing, however. The increased emphasis on learning outcomes (and competences) as a focal point for education and training reforms (partly linked to the development of the European Qualifications Framework and its implementation at national level (see also section 3.1) as well as initiatives taken within the Bologna process) has motivated a number of countries to increase activity in this field.

A number of different measures are being introduced to enable the validation and recognition of learning outcomes from non-formal and informal learning or as a means of accessing further training. For example the **Polish** report emphasises “the coherence between stages and areas of education (formal, non-formal and informal)”. **Poland** has a relatively low level of adult participation in education and training. Therefore validation of non-formal and informal learning is put forward as a possible solution to motivate individuals, through enabling them to have their learning outcomes “valued”, while at the same time enhancing their employability.

Seven countries have already reached an advanced level of implementation (**BE nl, DK, FI, FR, NL, NO, PT, SI**) and a large number of additional countries is engaged in exploring the possibilities of validating non-formal and informal learning. Several countries reported validation of non-formal and informal learning as one of their main objectives (**CZ, IE, NO, PL, SI, SK, IS**) and many other countries are also developing initiatives in this area (**AT, BE fr, DE, EE, EL, ES, HU, IT, LT, LU, RO, SE, SK, UK**). (See also section 3.2.).

### **2.5. Effective partnerships: consultation, implementation and dissemination**

#### *2.5.1 Partnerships and the preparation and implementation of lifelong learning strategies*

In most countries the Ministries of Education were responsible for co-ordinating the development of the national lifelong learning strategies. The strategy development process was in most cases underpinned by consultation among key stakeholders. This

allowed key stakeholders including social partners and non-governmental organisations and, where appropriate, regional administrations and municipalities to contribute.

The role of partnerships has been explicitly embedded in several of the strategies. In **BE**, **nl**, **CY**, **CZ**, **EL**, **ES**, **IS**, **RO** specific structures were established to co-ordinate the strategy development and consultative process. Partnership working is one of seven strategic orientations in the **Czech Republic** (Text Box 2.6); other examples of strong partnership arrangements include **AT**, **DK**, **NL** and **SE**. In **Germany**, the strategy document was agreed between the federal and *Länder* level of government and social partners are involved in the development of many of the key measures.

The **Romanian** report identified that one of the obstacles to the strategy development process was “the lack of a systemic and coherent debate” while the **Cypriot** report acknowledged that involving and co-ordinating the diverse interests of all relevant stakeholders was also a challenge.

#### **Text Box 2.6 Czech Republic – structures established to prepare the national lifelong learning strategy**

*In November 2006 the Ministry of Education, Youth and Sport (MEYS) set up an internal control group comprising Ministry staff and also an external expert control group which included members from the political sphere, social partners and members from the non-government sector. Both groups played an active role in the strategy drafting process.*

Where structures have been put in place to co-ordinate the strategy development process these structures have often been given implementation responsibilities. However, it is not always clear from the national reports whether there is a role for stakeholders in implementation and delivery as such involvement is not frequently mentioned. This appears to be weakness in many countries, which could negatively affect the implementation of the strategies. The **Greek** national report described a key role for stakeholders in implementing the strategy as well as the achievements associated with this co-operation (Text Box 2.7).

#### **Text Box 2.7 Roles for stakeholders in implementing lifelong learning in Greece**

*New partnerships at the national and regional levels have been established as a result of the Greek lifelong learning strategy and have brought together representatives from the public and private sectors.*

*All of the major social partners and key actors participate in the National System for Linking Vocational Education and Training with Employment (ESSEEKA), and the LLL Committee. LLL Committee representatives include representatives from the Ministry of National Education and Religious Affairs, Ministry of Employment, Ministry of the Interior, Public Administration and Decentralization, the Organisation for Vocational Education and Training (OEEK), the National Centre for Accreditation (EKEPIS), the Staff Committee for the Connection of Vocational Education and Training with the Employment, Social Partners and representatives from the University Rectors’*

*Committee and the Higher Technical Educational Institutes Presidents' Committee.*

*The introduction of ESSEKA has embedded the involvement of major stakeholders, social partners etc. concerning the national lifelong learning strategy (both in the strategy development and policy implementation processes). The national report states that social partners, such as the Federation of Greek Industries (SEV), the Labour Institute of the General Confederation of Greek Workers (INE-GSEE), the Centre for the Development of Greek Commerce (KAELE), the Vocational Training Centre of General Confederation of Professionals, Craftsmen and Tradesmen (KEK/GSEBEE), the Centre of Vocational Training Institute of Industrial, Professional and Vocational Training (IVEPE) have contributed to the following achievements:*

- *The improvement of vocational training and the promotion of employment over the past two years*
- *The promotion of relevant research / publications*
- *Initiatives to invest in human resources to boost positive labour market intervention measures within the context of the National Employment Strategy and the lifelong learning strategy.*

#### *2.5.2 Effective dissemination methods*

A range of different media is being used to disseminate information concerning the national lifelong learning strategies and their implementation. Reports and other policy documents are published and made available on various websites (e.g. **AT, BE nl, EE, HR, HU, MT, NL, PT, UK**). The effectiveness of making information available in such media is however also dependent on awareness among the public in general. Awareness raising / publicity campaigns (**DK, EL, NL, LU, PT**), publications (**CY, ES, LT, UK**), conferences and workshops mostly targeting practitioners and stakeholders (**CY**) are methods used for disseminating information about the national lifelong learning strategies, which have in many cases been supported by EU co-funding made available through a specific call for proposals.

One example where dissemination is at the heart of the national strategy is in the **Czech Republic**. The national report highlights information and awareness raising activities with the general public, education and training professionals, politicians, staff in other ministries and social partners and representatives from civil society (Text Box 2.8).

#### **Text Box 2.8 Czech Republic awareness raising and dissemination plans**

*The target audiences for awareness raising activities include the general public, education and training professionals, politicians, government and civic society. The ministry's website is key in disseminating information ([www.msmt.cz](http://www.msmt.cz)) along with the web pages of the Education and Training 2010 Work Programme ([www.et2010.cz](http://www.et2010.cz)). Projects linked to the strategy will be required to disseminate their findings. During 2007 three seminars cover three different aspects of the strategy: advisory services for lifelong learning; education of pedagogical staff, and entrepreneurship development. Awareness of the Strategy amongst key specialists in the field will be stimulated by articles written by specialists and the organisation of seminars.*



## 2.6. Conclusions

### 2.6.1 *The state of play*

Based on the information available primarily in the national reports, the progress achieved by participating countries in putting into place coherent and comprehensive lifelong learning strategies can be categorised as follows:

Countries with broadly coherent and comprehensive lifelong learning strategies. Eight countries have put in place explicit lifelong learning strategies which come close to the definition of coherence and comprehensiveness used in this report and in the underlying guidelines (**Austria**, the **Czech Republic**, **Denmark**, **Finland**, **Hungary**, **Norway**, **Sweden**, the **United Kingdom**). In the case of **AT**, **CZ** and **HU** the development of such strategies is a recent phenomenon and their implementation will now require particular attention.

Countries with lifelong learning strategies which are not yet fully comprehensive and coherent. Nine countries (**Belgium fr and nl**, **Croatia**, **Estonia**, **Germany**, **Greece**, **Latvia**, **Lithuania**, **Slovakia**, **Spain**) have developed explicit lifelong learning strategies, which could, however, demonstrate greater coherence and comprehensiveness. Some of these strategies are overly-weighted towards the formal systems (**BE fr and nl**) or adult learning as a particular stage of the lifelong learning continuum (**EE**, **EL**, **LV**). In others there remain challenges concerning the coordination of separate education and training levels and sectors (**BE fr and nl**, **DE**, **EE**) or of establishing flexible learning pathways between them (**HR**, **LT**, **LV**, **SK**). Some countries face challenges in following up their analysis or framework legislation by the adoption of concrete measures ensuring the effective implementation and dissemination of the strategies (**DE**, **EL**, **ES**, **SK**) or in developing stakeholder involvement and partnership (**BE fr**, **HR**).

Countries developing lifelong learning strategies. Eight countries (**Bulgaria**, **Cyprus**, **Ireland**, **Malta**, **Poland**, **Romania**, **Slovenia**, **Turkey**) are still developing their lifelong learning strategies. Some of these countries report to be close to adopting their strategies (**BG**, **CY**, **IE**, **MT**, **SI**, **TR**). In addition, some have already progressed well by implementing key measures related to coherent and comprehensive strategies, such as, for example, the development and implementation of a national qualifications framework or other key measures facilitating flexible learning pathways (**IE**, **MT**, **SI**).

Countries without an overarching strategy statement, but pursuing lifelong learning policies (**France**, **Italy**, **Luxembourg**, the **Netherlands**, **Portugal**, **Iceland**, **Liechtenstein**). In this group, three countries, **France**, the **Netherlands** and **Iceland**, stand out as pursuing lifelong learning policies and key measures in all areas discussed in this report, but without an explicit overarching policy statement providing an overview of the main challenges and related measures in the different sectors. **Luxembourg** has a comprehensive set of policies in terms of addressing the different education and training levels and sectors, but would benefit from strengthening measures promoting flexible learning pathways across the different sectors. **Italy** and **Portugal** have developed initiatives in key areas, but implementation of these measures remains an important challenge.

### 2.6.2 Outstanding challenges

The key challenge for the next two years is implementation. This concerns countries which have had their strategy in place for some time as well as those where the strategy has only been developed recently. Implementation issues concern also those countries where the strategy development process is still at an early stage, as the expectation is that a strategy will be put in place in the near future.

Some countries point to key challenges for the implementation phase. Issues related to budget allocations are mentioned in several reports (e.g. **EL**, **PL**, **SI**, **SK**). **Ireland** identifies the need to prioritise funding for groups at risk to improve their access and participation in lifelong learning. Other countries see a need for additional public and private funding to deliver the ambitions of their strategies, including the use of the structural funds (**CZ**, **LV**).

Two countries yet to present their strategies (**RO** and **CY**) pointed at the challenges involved in generating a national debate and co-ordinating and responding to the different perspectives of different interest groups. Further, a tendency to reduce the idea of lifelong learning to formal adult education and training can still be found among public institutions and social partners in **Poland**. Similarly, **Slovakia** identifies the resistance of formal education providers against the validation of non-formal and informal learning as an obstacle for progress.

The **Spanish** national report identified issues linked to the complexity of co-operation and communication between the national, regional and local government. Agreeing common approaches between different government levels is a main focus of the **German** and **Spanish** strategies. Challenges related to government re-organisation are mentioned by **Hungary**: a change of government in 2004 resulted in a change in ministerial responsibilities for VET from the remit of the Ministry for Education to the Ministry for Employment, which has affected the implementation of the existing strategy and created a need for better coordination within the governments as a whole.

The absence of infrastructure to implement curricula reform or coordinating qualifications systems and policies (**PL**) and an implementation gap between the establishment of a legislative basis and regional / local delivery on the ground (e.g. **EL**, **RO**) were also identified as factors affecting the progress of implementing existing priorities.

But strategy development will also continue to be a matter for discussion. Apart from the countries that still have to finalise their strategies, in some countries that have had national strategies in place for some time, there are future plans concerning evaluation and the assessment of results in order to update the strategy to reflect new challenges and priorities (**BE** fr and nl, **HR**, **LV**).

The Education & Training 2010 work programme will thus need to support increasingly the development and implementation of lifelong learning strategies in dialogue with individual Member States. This could take the form of enhanced monitoring, assessment

and discussion of the challenges which are specific to each country, for example, through peer-learning and peer-review activities and pilot projects.

### 3. TRANSVERSAL POLICY OBJECTIVES

There are four major transversal policy objectives covered in this chapter which are essential to the implementation of lifelong learning: elaboration of national qualifications frameworks or systems; measures to assess and validate non-formal and informal learning; establishment of lifelong guidance systems; and, initiatives to strengthen transnational mobility. Combined, these measures promote flexible learning pathways, enabling individuals to transfer their learning outcomes from one learning context to another and from one country to another.

The chapter synthesises, for each of the four themes: the status quo across the countries: the developments since 2005; and, outstanding challenges.

#### 3.1. National Qualifications Systems and Frameworks

A qualifications system is a general term which describes all the structures and processes in a country that lead to the award of a qualification. A qualifications framework is a more specific structure, which seeks to classify qualifications according to a set of criteria for levels of learning achieved. Frameworks make more explicit the different levels of qualifications contained in a qualifications system<sup>10</sup>. They are often established to integrate the different parts of a country's qualifications system, which in some countries have little communication or connection between the different sub-systems e.g. between VET and higher education. This section discusses the progress countries made in development of national qualifications frameworks and efforts made to eliminate obstacles between the various parts of their education and training systems.

##### 3.1.1 National Qualifications Systems and Frameworks

National qualifications systems (NQSs) can be, as noted above, very complicated with different types of qualifications and various awarding bodies. During the last few years increased attention has been given to the development of better structured and more transparent qualifications arrangements. An important purpose has been to facilitate access to qualifications, to make transfer of learning outcomes easier and to make progress more straight forward. This requires better cooperation between the actors involved, agreement on explicit levels of qualifications and introduction of clear pathways between the different sub-systems. The issue thus involves a combined

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<sup>10</sup> The EQF Recommendation distinguishes between 'National qualifications system' and 'National qualification framework' in the following way: 'National qualifications system' means all aspects of a Member States' activity related to the recognition of learning and other mechanisms that link education and training to the labour market and civil society. This includes the development and implementation of institutional arrangements and processes relating to quality assurance, assessment and the award of qualifications. A national qualifications system may be composed of several subsystems and may include a national qualifications framework; 'National qualifications framework' means an instrument for the classification of qualifications according to a set of criteria for specified levels of learning achieved. This aims to integrate and coordinate national qualifications subsystems and improve the transparency, access, progression and quality of qualifications in relation to the labour market and civil society;

simplification and modernisation of qualifications systems, addressing individual learners, employers and education and training institutions.

This combined simplification and modernisation of qualifications systems takes many different forms and focuses on different aspects. The following objectives are common:

- Creating more open and flexible sub-systems (**IE, HU, IS, PT, UK**). The details of such arrangements are discussed in sections 3.2, 5.6 and 6.5.
- Enhancing the coherence of national systems (**CZ, DK, EE, EL, LT, SK, UK**). This can take place by simplifying and/or systemising the education and training offer and possibly even developing a unified system.
- Developing and implementing national qualifications frameworks (NQF, see 3.1.2).

While open flexible and coherent systems can be developed without the introduction of an overarching NQF, the majority of countries have decided for this option. The main objectives of developing qualifications frameworks are: to establish standards (in terms of learning outcomes) for qualifications, to enable comparisons of qualifications, to improve learning access, transfer and progress and to improve the quality of education and training provision.

Two main factors seem to have triggered the rapid development of NQFs throughout Europe. Firstly, the development of a European Qualifications Framework (EQF) as a meta-framework supporting transfer and comparisons of qualifications in Europe<sup>11</sup> has acted as a catalyst for the development of national qualifications frameworks. Following the EQF proposal, which is currently being adopted, many countries have expressed the political willingness to create a national qualifications frameworks defined through learning outcomes and linked to the EQF. Secondly, several countries have started development of NQFs prior to the launching of the EQF. In these cases the frameworks respond to a national agenda asking for more efficient, open and transparent qualification systems. It is likely that this convergence of national and European objectives explains the rapid development of NQFs since 2005.

### *3.1.2 Current state of play and progress made since 2005*

Four countries (**FR, IE, MT, UK**) have already developed and implemented, at least partially, their own NQFs. Most of these countries (**FR, IE, UK**) have NQFs which preceded the EQF development. Furthermore, the **UK** does not have one overall qualification framework but four distinct ones<sup>12</sup>. The **Maltese** NQF can be seen as

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<sup>11</sup> COM(2006) 479.

<sup>12</sup> There are two "trans-national" systems in the UK: the National Qualifications Framework for England, Wales and Northern Ireland (NQF) which covers school-level and VET qualifications and is currently being converted to a credit transfer and accumulation system; and the Framework for Higher Education Qualifications in England, Wales and Northern Ireland (FHEQ) which is a sub-framework concerning only higher education. There are also two country-specific frameworks, the Scottish Credit Qualification Framework (SCQF) and the Credit and Qualification Framework for Wales (CQFW), which in addition to

directly triggered by the development of the EQF and is currently in its last development stage (its implementation is planned for 2007-2008).

The great majority of countries have recently started preparatory works to establish a NQF. Some of these have reached an advanced stage of development while others are still at the beginning of the development process. Those countries which are among the more advanced ones (**BE nl**, **BG**, **CZ**, **DK**, **LT**, **SI**) have already put in place the main elements on which to build NQFs, such as the qualification levels, descriptors and qualifications repertoires. The **Czech Republic**, for example, has created a legislative framework for a NQF in 2006 and its implementation is to start in summer 2007. A strategy to approve and implement the **BE nl** qualifications framework was developed in spring 2007 (Text Box 3.1). **Bulgaria** and **Slovenia** have developed qualification repertoires which serve as basis to design an overarching NQF.

### **Text Box 3.1 Belgium Flemish community qualifications framework**

*In spring 2007, the Flemish community developed a strategy to approve and implement the Flemish Qualifications Framework. All relevant stakeholders were involved in the process. The strategy follows on from the 2006 Green Paper on the Flemish Qualifications Framework. A white paper leading to a decree establishing the Flemish qualification framework is expected by July 2008.*

A second group of countries have committed themselves to developing an overarching NQF but are currently at the beginning of the process (**AT**, **BE fr**, **DE**, **EE**, **ES**, **FI**, **HR**, **HU**, **IT**, **LU**, **LV**, **NL**, **PL**, **PT**, **SK**, **TR**). Among these countries, five have recently created a working group or a committee examining the possible modalities for establishing a NQF (**AT**, **BE fr**, **DE**, **HR**, **IT**). These working groups usually have the role of formulating a proposal for a NQF design and examining the link with EQF. Three countries are progressively implementing or testing learning outcomes based approaches (**DE**, **HU**, **IT**) and two (**ES**, **TR**) are planning to build a qualification framework for VET and combine it with the HE qualification framework, currently in development in both countries.

Another six countries have not yet formally committed themselves to developing a NQF and are currently examining the possibilities of it (**EL**, **IS**, **NO**, **PL**, **RO**, **SE**). Three of these countries have developed or are developing qualification frameworks for VET (**RO**, **IS**<sup>13</sup>, **NO**) and are examining the possibilities of making these coherent with the higher education framework and the EQF. **Sweden** is for the moment considering two possibilities: a NQF or linking qualifications directly to EQF.

There are three countries which do not plan to introduce a NQF (**CY**, **EL**, **LI**). **Greece** has classified its formal education system, including higher education, according to the

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being qualification framework s for all sectors of education (school, HE, VET and informal and non-formal learning are also credit system for transfer and accumulation.

<sup>13</sup> In Iceland the qualification framework will be a upper-secondary framework covering both VET and non-professional qualifications

eight levels of the EQF. However, this was done only for the level of knowledge and not for the other two dimensions used in the EQF (skills and competence).

In addition to the developments at the national level, several countries also mentioned the participation in pilot projects as a way of exploring the possibilities for setting up a NQF or the implementation of the EQF (**BE nl, CZ, EE, FR, HR, HU, NL, NO, RO, SE**). These pilot projects are often co-financed through the European Social Fund or the Leonardo da Vinci Programme.

### **Text Box 3.2 Estonia - pilot projects for qualifications frameworks**

*Three large ESF funded projects are being used to renew the legal basis and update the national qualifications framework in **Estonia**. The projects are seeking to develop the professional qualification system, increase the competitiveness of graduates by improving the quality of studies and prepare competence-based content modules for vocational programmes.*

Several countries have already developed partial qualifications frameworks for certain types of education and training. For example, from 2001 to 2006, **Estonia** progressively developed a competence framework for VET while **Latvia** and **Romania** also have VET frameworks. Other countries (**ES, IS**<sup>14</sup>, **NO, TR**) are considering developing VET qualifications frameworks and this includes also countries which are not, for the moment, planning an overarching NQF. Other countries have already implemented or are implementing frameworks for higher education qualifications based on the Qualification Framework of the European Higher Education Area (EHEA) developed in the context of the Bologna process (e.g. **BE nl, BG, CY, DK, DE, ES, HR, HU, IS, NO, PT, SE, TR**). The parallel development of qualifications frameworks for separate parts of the education and training system of course raises the question of overall coordination at national level and the link to a meta-framework like the EQF at the European level.

Five countries mentioned the development of a repertory of qualifications as a preparatory measure for the development of a NQF. Since 2005, the **Czech Republic** has set up a publicly accessible register of all complete and partial qualifications which have been recognised by the Czech competence authorities. **Belgium nl** is initiating the development of a qualifications databank. **Estonia, France** and **Hungary** have already built registers of vocational qualifications.

#### *3.1.3 Alignment of NQFs and the European Qualifications Framework (EQF)*

The EQF proposal is composed of eight qualification levels, which apply to all qualifications (general education, VET, HE, adult education). These levels are described through level descriptors in terms of learning outcomes (knowledge, skills and competence). The eight EQF levels serve as a reference to situate qualifications within a trans-national framework for reasons of comparisons and transfer.

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<sup>14</sup> Iceland is considering the introduction of a qualification framework for upper secondary education and training, which includes both VET and academic qualifications.

The learning outcomes approach, i.e. looking at the level of qualifications independent of the process of acquisition, is one of the fundamental principles of EQF. It however also represents a challenge for countries where learning outcomes have so far not been used for describing qualifications. Several countries are already using learning outcomes approaches for all their qualifications, independent on whether they have or not a NQF (**CZ, FI, IE, SE, SI, UK**). However, in some of these countries the passage from inputs to outcomes is recent and not yet fully implemented (**CZ, SI**). Many other countries are progressively developing learning outcomes approaches, though sometimes only for parts of their qualifications systems, for example for VET. While the above mentioned countries have been developing learning outcomes-based approaches prior to EQF elaboration, in other countries, the EQF has triggered such changes (e.g. **EL, HU, SK**). In higher education, the wider use of learning outcomes was often linked to the use of the EHEA qualification framework developed in the context of the Bologna process. (For more details on the development of learning outcomes approaches in Schools, HE, VET and adult learning see sections 4.1.2, 5.6 and 6.5 respectively.)

Although the eight EQF levels should only serve as a European reference and countries can have a different numbers of levels in their NQFs,<sup>15</sup> many of the countries which are currently developing NQFs are elaborating eight level structures, in line with the number of EQF levels. Ten countries mentioned the elaboration of an eight level system as an objective (**BE nl, CZ, EE, EL, HR, LT, MT, NL, SI, TR**).

### *3.1.4 Remaining challenges*

Though most countries do not explicitly mention them and a great momentum can be seen at the national level, three main challenges to the development of NQFs can nevertheless be identified in the national reports.

First, some countries do not have a tradition of describing qualifications in terms of learning outcomes, but have formerly described them in terms of the components and characteristics of education and training programmes. Therefore several countries which intend to develop an NQF compatible with the principles of the EQF need to redefine their qualification levels in terms of learning outcomes.

Second, some countries (**EL, HU**) note potential difficulties in referencing their national qualifications to the different dimensions of the EQF levels. As the latter are defined in terms of knowledge, skills and competence, it may happen that links can be established between national and EQF levels in terms of, for example, the knowledge dimension, while the same level may not match for the skills or competence dimension.

Finally, the existence of several partial qualification frameworks (e.g. for VET and HE) may be a challenge for the definition of an overarching framework in a country. As noted above, several countries have already implemented or are implementing partial qualification frameworks (e.g. for HE and/or VET) and their bridging will require some coordination and perhaps adjustment.

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<sup>15</sup> For example, the **Irish** framework comprises ten levels and the **French** has five plus one (which corresponds to “no qualification”).



### 3.2. Validation of non-formal and informal learning

Learning outside formal education and training institutions, here described as non-formal and informal learning, constitutes a major part of the learning activities which take place after an individual leaves initial education and training. In order to be able to capitalise on and use their learning outcomes efficiently, individuals should be able to have all their knowledge, skills and competences identified, assessed and/or recognised, independent of the learning process. Validation of non-formal and informal learning thus is a key aspect in any strategy aimed at lifelong learning<sup>16</sup>. The development of validation of non-formal and informal learning is closely linked to a conception of qualifications based on learning outcomes rather than education and training programmes, and is therefore a relatively new process in many participating countries, as noted above.

#### *3.2.1 Different approaches to validation of non-formal and informal learning and the progress made since 2005.*

Following early experimentation during the 1990s, validation of non-formal and informal learning has gradually moved into mainstream lifelong learning policies in the majority of EU countries. Countries are, however, moving at different speeds. For example, the French system of “validation des acquis de l'expérience (VAE)” is currently applied to all qualifications, notably those which are awarded by 14 ministries. 20,000 candidates received a full qualification through VAE in 2005. For instance, 3000 candidates out of 7500 who applied and were admitted go through the procedure, received a full qualification awarded by the ministry of employment. The French approach is significant since it presents a fully integrated system, making the award of a qualification independent of a particular education and training pathway or institution. Countries like (BE nl, DK, FI, FR, IE, NL, NO, PT, SI) have also reached an advanced level of implementation.

Another group of countries is close to integrating validation of non formal and informal learning into their qualifications systems (AT, BE fr, CZ, ES, IS, IT, LT, LU, PL, RO, SE, SK, UK). However the problems faced by these countries in view of adopting systems vary. In some of these countries validation of non-formal and informal learning is a fairly new development and wide ranging developmental work is necessary to set up methods and institutions (EL, LT, PL, SK). In others, validation procedures have been functioning for a longer period now, but only at local level or within particular initiatives. These countries are currently trying to put in place coherent validation approaches (AT, ES, IT, SE, UK), but sometimes this is difficult due to regional differences (IT). In addition, though several countries note the possibility of procedures for validation of non-formal and informal learning being given a legislative basis (BG, EE, ES) such legislation does not yet ensure that validation procedures will be implemented and used.

There are two major types of validation of non-formal and informal learning, each with a different purpose: validation of non-formal and informal learning as a means to access further education and training; and, validation for acquiring a qualification. The first

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<sup>16</sup> See Council Conclusions of 28 May 2004 on European principles for the validation of non-formal and informal learning.

concerns mainly access to higher education institutions, but also other education and training providers, and consists of identifying and recognising the learning outcomes already acquired in order to avoid repetition of learning. The second concerns mostly vocational qualifications and consists of assessing the learning outcomes acquired against a qualification standard in view of recognising full (or sometimes partial) qualifications independent of the learning context. (For further details on flexible pathways in Higher education, VET and adult learning see sections 5.4 and 6.4 respectively).

The following kinds of validation of non-formal and informal learning methods are mentioned in national reports:

### Competence portfolios

Several countries reported the introduction of competence portfolios as a means of presenting an individual's knowledge, skills and competence (AT, BE nl, DK, FR, IT, PT, SI). Portfolios are established either on the basis of evidence and documentation or on the basis of examination. Portfolios are a part of a validation process as they provide evidence and they document acquired learning outcomes. However they do not lead directly to validation of a full or a partial qualification, but the evidence they provide is a basis of a validation process.

### Examinations

Several countries mentioned external examinations which result in an award of full or partial qualifications as another method to assess and validate individual's learning outcomes (AT, EE, ES, EL, FR, HU, LT, NO, PL, SI, SE, SK). Examinations can have a different nature, they can be written, oral or computer based examinations (HU – the European Computer Driving Licence example), practice tests (EE), professional simulations or a combination of several methods (FR). The development of validation examinations varies significantly from country to country. While some of these countries have a comprehensive system for validation of non-formal and informal learning based on such external examinations (FR), others are only testing it for some qualifications (EL) and some, such as Slovakia, are only in the planning phase (Text Box 3.3).

#### **Text Box 3.3 Slovakia – development of the validation process**

*The **Slovakian** lifelong learning and lifelong guidance strategy envisages attaining qualifications through validation of non-formal and informal learning. Individuals participating in non-formal educational activities can accumulate credits and with guidance support, shape partial or full qualifications according to personal needs and / or the needs of the local or regional labour market.*

*The validation process combines the validation of prior experience and the assessment and validation of learning outcomes.*

Examinations and portfolios can be closely linked, where portfolios can be the basis to admit citizens to examinations (FR). Portfolios can also complement examinations (e.g. through documenting professional experience) and examinations can result in portfolios.

It should be underlined that, while in few countries it is possible for individuals to obtain full qualifications through validation of non-formal and informal learning procedures, in others; full qualifications remain linked to the formal learning process. In other words, in these countries a qualification can only be acquired through a defined formal education programme. Therefore, it is often legally impossible to deliver qualifications through the validation of non-formal and informal learning and another type of certificate or diploma has been put in place specifically for the validation procedures (e.g. **BE fr**, **EL**). For example, in the **Belgian** French speaking community, such certificates do not lead to the same full entitlements as a qualification acquired through formal education, as they are not awarded by the same authority (i.e. the validation bodies are not the same as the bodies awarding formal qualification).

### Validating non-formal and informal learning for access to higher education

Many national reports note that higher education institutions have an important autonomy in validating non-formal and informal learning, in terms of methods but also whether they actually put in place validation procedures or not<sup>17</sup>. While in some countries higher education institutions may practice validation of non-formal and informal learning at their own discretion (**CY**, **TR**), in other countries, they have to enable individuals to claim validation and hence have to have procedures in place (e.g. **BE nl**, **FI**, **LU**, **NL**, **NO**, **SE**). The latter are mostly countries with a strong tradition of independent education and training institutions. However, lack of coordination of validation procedures may be problematic because of little quality assurance criteria and issues of fairness and equality.

Like the **Finnish** example (Text Box 3.4), other countries have recently recognised the validation of non-formal and informal learning as a right for individuals (**FR**, **HU**, **IS**, **SE**) though not all of them have so far put the necessary structures in place.

#### **Text Box 3.4 Finland - validation of non-formal and informal learning for individuals**

*Universities may consider as eligible candidates who do not have the required qualifications but have achieved corresponding competences through non-formal and informal learning. Prior learning has to be “visible”, to receive an assessment of these competences, and to obtain a decision as to how it is recognised. It is the student’s duty to substantiate the learning but institutions should develop systems for the validation.*

The new measures introduced since 2005 mentioned in the national reports include:

- Establishment of certification or assessment body(ies) (**BE nl**, **RO**)
- Training of assessors (**CZ**)

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<sup>17</sup> This issue is further explored in Section 6

- The possibility for higher education institutions and/ or VET institutions to validate prior learning with a view to awarding credits valid for formal training in those HE institutions (**EE, HU**)
- Administrative simplification of validation procedures (**BE nl**) and improved access to the validation of non formal and informal learning (for example in **Estonia**, the restrictions related to the volume of studies undertaken prior to a validation have been removed)
- Information campaigns and incentives for individuals to apply for validation of non-formal and informal learning (**ES, FR, PT**)
- Methodological development (**BG, ES, LU**)
- Introduction of a quality code/ assurance for validation of non-formal and informal learning (**DK, ES, NL**)
- Increased validation of on-the-job training (**DK, PL**).

### 3.2.2 Remaining challenges

Validation of non-formal and informal learning is increasingly being accepted as a key instrument for realising lifelong learning. Few national reports mentioned challenges in view of the introduction of validation of non-formal and informal learning and its implementation. Some countries which are just introducing validation of non-formal and informal learning procedures noted the need for further guidelines and methodologies on how to identify learning outcomes from non-formal and informal learning and how to organise a validation process. This need is now being addressed by the cluster on Recognition of learning outcomes (see also section 7.2.2 (iix)).

In addition, the lack of interest of some formal education and training institutions in undertaking the validation of non-formal and informal learning and in participating in its development is noted as an obstacle (**HU**). Therefore the challenge for some countries is to overcome this opposition among the stakeholders in formal education to the validation of non-formal and informal learning.

A key issue here is quality assurance as stakeholders in formal education in some cases worry that the validation of non-formal and informal learning could result in lower standards. Recent developments of quality assurance procedures (**BE fr, NL**) may help to avoid this problem. The adoption of the European principles on validation in 2004 seems to have been positively received by countries and some have used them as a partial basis for their validation systems (**IE, IS, NL, NO**).

On the other hand, a few countries with a developed validation system (e.g. **NO**) mention the lack of interest by potential beneficiaries in having their learning outcomes validated. A similar situation is underlined in the **United Kingdom** where attempts in the 1980s to develop a validation system for non-formal and informal learning “failed to establish widespread credibility with learners, educational institutions or employers”. Though no

reasons are mentioned for such a lack of demand, it could be questioned whether appropriate financing and dissemination have been provided for such initiatives. However, as credit frameworks have become more established in the **UK** significant progress has been made. It should be noted that, in order to build a large scale validation system for non formal and informal learning, countries need to invest adequate resources in making it widely available and in promoting it in order to ensure that the offer meets the demand.

In spite of the above challenges the validation of non-formal and informal learning is gradually becoming an integrated part of lifelong learning throughout Europe and, while still facing methodological and institutional challenges, the majority of countries have accepted this approach as a key to opening up qualifications to a broader basis of learning outcomes.

### **3.3. Lifelong guidance**

In order to raise participation in lifelong learning, to motivate learners and to avoid failures leading to drop outs from education, countries need efficient and widely accessible guidance systems. The new paradigm of ‘lifelong guidance’ contributes to the achievement of the EU goals of economic development, labour market efficiency and occupational and geographical mobility by enhancing the efficiency of investment in education and vocational training, lifelong learning and human capital and workforce development. Traditionally reserved for schools, youth and the unemployed, guidance should become available at any age for any socio-economic group without major obstacles to access. At the same time, the quality of counsellors’ preparation, supported by availability of up-to date information, needs to be prioritised in order to orientate learners efficiently and to deliver good service. In 2004, the Council adopted a Resolution on Guidance throughout life which recalled as priorities: high-quality guidance oriented to citizens’ lifelong and life-wide learning and improvement of guidance structures. The resolution equally invited countries to examine their guidance provision and to ensure effective cross-sectoral cooperation and coordination of guidance policies.

In order to support countries in moving European cooperation on lifelong guidance forward in both the education and the employment sectors, the European Lifelong Guidance Policy Network was established in 2007 with 26 member countries. Its purpose is to promote cooperation at country level on lifelong guidance and to put forward appropriate structures and support mechanisms in implementing the priorities identified in the Resolution on Lifelong Guidance (2004).

#### *3.3.1 Policies and systems and progress made since 2005*

The coordination and coherence of guidance approaches within countries is currently among the most important challenges countries are facing. According to the national reports, many countries have developed, or are in process of establishing, a comprehensive guidance system, where counselling is available throughout life (**AT, BE nl and fr, CY, DK, EE, ES, FI, FR, IS, IT, MT, PT, SE, SI, UK**). Several countries noted the development of initiatives to build an integrated guidance system for adults

(**AT**, **BE** **fr** and **nl**, **EE**, **ES**, **HU**, **UK** – England) while some others are trying to improve coordination among the different existing systems (**NO**, **HR**, **LU**). These measures are a reaction to the existing fragmentation of guidance supply in most countries where education guidance and labour market guidance function independently of each other (Text Box 3.5 outlines the situation in England where a new adult careers service will be introduced). **Italy**, for example, is developing regional guidance initiatives where schools and employment services work in close cooperation to offer better adapted counselling. However, while progressively moving towards lifelong guidance, many countries still focus their guidance activities on the traditional target groups: schools (most often lower and upper secondary) and services to unemployed people.

### **Text Box 3.5 UK England - Development of integrated guidance in England**

*Both a recent report and a cross governmental review of information, advice and guidance for adults recommended rationalising information points (which are considered fragmented) and developing a new universal adult careers service to enable people to make informed choices about improving their learning and skills. The intention is that a new careers service for adults will empower individuals to adopt a positive, proactive approach to career management, with learners able to choose from a menu of services, accessed face-to-face, on-line or over the phone and encourage people to dip in and out of information, advice and guidance services throughout their careers. The service will be underpinned by high quality labour market information and a customer tracking and follow-up system.*

*The English strategy will maintain separate services for young people, but will aim to ensure that the transition between the young people and adult services are managed effectively and that common issues such as quality standards, labour market and occupational information, contracting and workforce development are looked at collaboratively.*

The information provided in the latest report on progress in implementing the Council resolution on guidance gives a slightly different picture<sup>18</sup>. According to that report, countries considering coordination of guidance policies are: **AT**, **BG**, **CY**, **CZ**, **FR**, **IT**, **MT**, **PL**, **SK**. Other countries have formalised the willingness to ensure coordination of guidance provision through: legislative changes; establishment of bodies/ commissions; policy statements (**CZ**, **DK**, **ES**, **FR**, **HU**, **MT**, **LT**, **LU**, **LV**, **PL**, **PT**, **RO**). According to this report, countries where examples of integrated approaches are progressively being implemented are: **DK**, **ES**, **IE**, **UK**.

In addition, several recent developments have been put in place in HE (**BG**, **FI**, **HU**, **RO**). **Finland**, for example, introduced an obligation for universities and polytechnics to prepare personal student study plans and to monitor students' progress against these. Some of the developments in HE are closely linked to the Bologna process (**RO**).

<sup>18</sup> Sultana, R. (2007) Europe and the Shift Towards Lifelong Guidance. A Synthesis Report on Progress in Implementing the Council Resolution.

Nine countries noted improvements in guidance for disadvantaged groups (**AT, CY, DK, ES, FI, IE, IS, IT, RO, UK**). This covers varied target groups and measures:

- Counselling for students with special needs (**CY, ES, IT**)
- Focus on improving access of disadvantaged groups (**AT, DK, ES, FI, UK**)
- Focus on early school leavers (**DK, ES, FI, IE**)
- Individuals disadvantaged in the labour market (**UK**)
- Improved access of people living in rural areas (**IS**)
- “outreach guidance” for individuals who face important obstacles to lifelong learning participation (**DK, IE, RO** (Roma population)).

There is a clear interest in improving the evidence-base of guidance policies. Twenty countries have recently evaluated or commissioned studies of their guidance systems (**AT, BG, CY, DE, EE, EL, FR, FI, HU, IE, IT, LT, LU, NL, MT, PL, RO, SE, SI, UK** - England, Scotland). Most of these evaluations, even in countries with a relatively comprehensive service, revealed gaps in guidance provision, particularly guidance for adults in employment (**AT, IE, UK**). This shows that, despite the fact that countries are developing coherent guidance policies, implementation of these, mainly at local level, remains a challenge.

Though the interest in adult guidance seem to be increasing, with nine countries implementing measures which focus on employed adults (**CY, DK, ES, FI, HU, IE, IS, PT, SI, UK**), it remains insufficient and many countries still focus mostly on guidance for youth and groups at risk (unemployed and marginalised).

An important number of new initiatives are occurring in the area of staff improvement and quality assurance. Many countries have recently introduced new curricula or training for guidance staff and/or new “guidance” components in teachers’ curricula (**AT, BG, CY, DK, EL, FI, IE, LT, MT, PL, RO, SK**). The quality of guidance services is mentioned as a main concern by several countries (**BE fr, DE, DK, EE, EL, LI, FI, SE, SI, UK**).

Countries are also working on the improvement of their information-base for both counsellors and potential learners, through development of online portals with information on education and training provision (**BE fr, BG, CY, EL, ES, FR, LT, NL, PT, RO, SE**). Other countries are setting up national guidance fora/ platforms or working groups to formulate guidance policy objectives and to exchange information (**AT, CY, CZ, DE, DK, EE, EL, FI, FR, IE, IT, LT, LV, MT, NO, PL, SI**). The national fora typically bring together different ministries and various stakeholders to develop common guidance policies.

The most recent developments include the following initiatives:

- Development of specific curricula for counsellors or teachers (**DK, MT, LV, RO**)

- Establishment of new guidance centres (**BG** – secondary, **CY**, **HU** - focus on HE, **RO**)
- Publication of a nationwide report/ study on guidance and/or counsellors needs (**BG**, **EE**, **IE**, **SI**)
- Initiatives to motivate young people at risk of dropping out from initial education by orientating them towards flexible basic education programmes (**FI**)
- Setting up of a research centre for lifelong guidance expertise (**FI**) (Text Box 3.6)
- Information portal (**BE fr**, **BG**, **FR**, **NL**, **PT**, **SE**)
- Policy document on guidance (**AT** – strategy for LL Guidance, **FI** – development plan for adult guidance, **LT** - Vocational Guidance Council, **NO** - white paper, **HU**, **LT**, **LV**, **MT**, **PL**, **UK** - Northern Ireland - strategic policy frameworks).
- Strengthened orientation and guidance presence in schools (**FR**), through compulsory elements of guidance in curricula (**AT**, **FI**, **IT**)
- New legislation on guidance (e.g. **DK**, **ES**, **FI**, **PL**).

#### **Text box 3.6 Finland National Centre of Lifelong Guidance Expertise**

*The National Centre for Lifelong Guidance Expertise operates at the University of Jyväskylä. It has been set up as a multidisciplinary research unit with a view to strengthening the evidence base to inform national practise and lifelong guidance policy development over the 2006-2011 period. Key elements of the Centre's work are to develop the training of guidance professionals, service delivery models and quality assurance mechanisms via national and international cooperation projects and networks.*

#### **3.3.2 Remaining challenges**

Very few countries gave details on challenges for setting up lifelong guidance systems. Nevertheless the main areas where gaps are noted concern the insufficient numbers of counsellors (**PL**, **RO**) and insufficient funding of guidance centres (**BG**) which both influence the availability but also the quality of guidance services. Other obstacle mentioned concerned weak coordination of various guidance services, under the responsibility of different institutions (**HU**) or the lack of coherent guidance policy at national level (**BG**). The insufficient impact of the existing guidance systems was also noted as one of the challenges to overcome (**HU**).

Overall, a common challenge for participating countries is the development of national cross-sectoral feedback mechanisms and this requires effective dialogue and the engagements of governments, employers and other social partners as well as subject experts. This challenge is progressively being acknowledged by countries developing structures for dialogue and exchange (national guidance fora).



Finally, it appears that, while countries concentrate on youth and people in difficulties (unemployed, etc.), little attention is paid to guidance for adults in employment. However, guidance to employed people is essential for their further career development and for skills management within societies and organisations.

### **3.4. Transnational mobility**

The European Union has undertaken numerous initiatives to promote transnational mobility of learners, such as the EU programmes in this area and the launch Europass. In order to encourage participating countries to strengthen the quality of mobility initiatives, to ensure that mobile students are given sufficient support and to foster recognition of periods of study abroad, the European Parliament and the Council adopted, in 2006, a recommendation on European Quality Charter for Mobility. However these programmes and tools can only function efficiently if participating countries make efforts to use them and to reduce obstacles to mobility such as difficulties in the academic recognition of foreign diplomas or lack of validation and recognition of periods of study abroad. This section examines the progress participating countries have made since 2005 in removing obstacles to mobility and providing incentives for learners to go abroad and/or to come to their countries.

#### *3.4.1 Measures to reinforce transnational mobility and progress made since 2005*

Several countries indicate that transnational mobility has recently increased (e.g. **AT, EL, FI, LV, PL, SI, SK, IS, TR**). Most of these attribute the increase to their participation in the EU programmes.

While in most countries the EU programmes are still the main driver of mobility, several interesting national initiatives are mentioned:

- Additional funds to supplement Erasmus scholarships or to promote national scholarships (**AT, BE fr, DE, EE, ES, FI, IT**)
- Measures which enable students to use their study loans or grants for studies abroad (**AT, DK, HU, IE, LU, NL**)
- Strengthened language teaching (**BE fr, CY, EL, SE, UK, TR**)
- Measures to attract foreign students including:
  - Better provision of education and training courses available in foreign languages (primarily English) (**CY, FR, IS**)
  - Information services to understand and compare qualifications (**BG, IE**)
  - In the field of advanced higher education degrees and in some specialised areas, countries offer scholarships to attract and retain talents (**EE, IT, NL**).
  - Setting up joint-centres with foreign universities (**IT**).

A few countries have made mobility (mostly outgoing mobility) a key priority (Text box 3.7).

### **Text Box 3.7 Countries where transnational mobility is a priority**

**Austria** - Additional grants provided yearly by the Government approximately double the funds provided by the EU (Erasmus). The latest amendments (2005 and 2006) to the Law on the Promotion of Studies Abroad have brought about great improvements in the interest of studying abroad.

**Denmark** - The Danish government has presented a Bill aimed at increasing the mobility of vocational education and training students and teachers. In summer 2007 financial incentives for institutions to promote mobility will be introduced at the vocational colleges similar to those used in higher education. Simultaneously, subsidies will be introduced for VET institutions to improve the opportunity of attracting foreign guest teachers to their institutions.

**Denmark** – has also introduced the portability of per student funds usually allocated by the state to national higher education institutions. The student can ask for an amount up to the size of the amount normally allocated to a specific programme in **Denmark** to be taken abroad to complete either part of a similar higher education programme or a full Master programme.

**Germany** - has set a target 20% of all HE students spending at least one semester abroad. This is accompanied by a large information campaign “Go out – studieren weltweit”.

Sixteen countries note that they provide support to transitional mobility which goes beyond the European lifelong learning programmes (AT, BE fr, DE, DK, EE, ES, FI, FR, IE, IT, LT, NL, NO, SE, TR, UK). This support usually comprises national scholarships, bilateral exchange programmes, or exchange programmes outside the EU. However, it is difficult on the basis of the data provided to estimate the scale and impact of this support. Ten countries (BG, DE, DK, EE, ES, IE, IT, NL, SE, SI) mentioned the creation of new national measures to support mobility. Again these measures vary. While some countries facilitate administrative barriers for foreign students, others invite education institutions to adapt the education and training offer to foreign students. On the basis of information provided it is not possible to estimate which of these are large scale measures and which are small scale initiatives.

The majority of countries (AT, BE fr, CY, CZ, EE, EL, ES, FI, FR, HR, IE, IS, IT, LT, LU, LV, MT, NL, PL, PT, RO, SE, SI, SK, UK) highlight the implementation of Europass documents as a key recent development to support mobility. Such developments follow the adoption of the European Parliament and Council Decision on a single Community framework for transparency of qualifications and competences (Europass) in December 2004 which brings together in a coordinated Europass portfolio different existing documents (CV, Mobility, Diploma supplement, Language portfolio and Certificate supplement) and provides for an implementation structure organised around a central internet-based service and a network of National Europass Centres (NEC).

Among the mobility improvements countries mentioned, the following relate to Europass:

- NECs were established in all countries in 2005, with the exception of **Bulgaria** and Rumania, where NECs became operational in 2007.
- Higher education institutions issue widely the Europass Diploma Supplement, though the situation varies significantly from one country to another. In some countries, the delivery of the diploma supplement has become compulsory (**AT, CY, EL, FR, HR, HU, IS, LI, PL, SI, SE**). The diploma supplement is delivered automatically, in two languages (the home language and English) and free of charge.
- The delivery of Europass certificate supplements (in VET) equally varies between countries and between regions within countries. In some countries, the supplements can be downloaded from the internet (**AT, CY, DK, FR, IS, LT, NL, NO, SE**), in others they have to be requested (**DE, HU, IE, IT, PT, SI, UK**) or are automatically issued like in **Poland**. In some countries (**EE, SI**), the Europass Certificate Supplements are for the moment available only for certain qualifications.
- The use of Europass Mobility for organised learning mobility is increasing in all countries. In 2006, more than 13,000 were issued in **Germany**, 4300 in **France** and 3500 in **Italy**. At the moment, about 3500 CV are created online every day through the CV online facility; about 4300 CV templates are downloaded from the site every day.

The remaining Europass documents (CV and Language portfolio) can be created online in the European portal or downloaded and completed offline by individual users. At the moment, about 3500 CV are created online every day through the CV online facility; and about 4300 CV templates are downloaded from the site every day. A few countries also noted the improved academic recognition of foreign qualifications and/ or of periods of study abroad (**FI, IT, SE**). In **Finland**, a university or polytechnic student is entitled to include, in their degree, studies completed at another domestic or foreign higher education institution or other educational institution. In **Sweden**, a review of effectiveness and quality of the current validation arrangements for foreign higher education programmes has been launched. Only three countries noted measures to reduce the administrative burden for incoming and outgoing students (**FI, NL, SI**).

### *3.4.2 Remaining challenges*

Transnational mobility in HE is still at the centre of most countries initiatives on mobility, while the mobility of VET learners and teachers and trainers is paid much less attention. Only very few of the national reports give information on mobility outside higher education. In addition, very little mention is made of measures to improve recognition of periods of study abroad and of foreign qualifications.

Despite the recent Recommendation on the European Quality Charter for Mobility, **Finland** has noted initiatives to improve the quality of transnational exchanges, in particular through the European Quality Award for vocational education and training.

Other challenges mentioned are:

- Lack of willingness of institutions to consider learning periods spent abroad as equivalent to education and training provided in home country (**HU**). The introduction of ECTS has not brought the desired results in this area.
- Little awareness of Europass documents (**UK**) and their insufficient use (**SK** – only 20% of mobile students receive them)

### 3.5. Summary

*Elaboration of national qualification frameworks or systems.* A large number of countries are engaged in a developing National Qualifications Frameworks (NQF). Progress and the approach varies from country to country. Nine participating countries have a NQF or are well advanced in its development. The qualifications frameworks are closely linked to development of learning outcomes based approaches. Some countries still have to adapt their national systems to take account of learning outcomes and this has slowed the development of NQFs. The development of NQFs and of the use of learning outcomes will, in the future, strengthen the possibilities for the validation of non formal and informal learning procedures.

*Measures to assess and validate non-formal and informal learning.* Several countries have already well developed systems while more countries are developing initiatives to introduce more coherent and large scale procedures. However, the development of validation of non-formal and informal learning and its status still vary. Several countries are in the pilot phase and others are meeting obstacles in creating a homogeneous system. The major obstacles to the further development of validation of non-formal and informal learning procedures are the lack of a tradition of learning outcomes-based qualifications, and the fact that in some countries participation in formal learning remains a prerequisite for the acquisition of qualifications. Hence the same learning outcomes cannot lead to a full qualification if acquired in non-formal or informal learning. The further exchange of information on the methods and organisation of the validation of non-formal and informal learning could benefit countries which have progressed less in this area.

*Establishment of lifelong guidance systems.* Many countries are developing guidance measures accessible to individuals of all ages and initiatives targeted at particular disadvantaged groups. Several countries reported progress in coordination and integration of the supply of guidance. However, the fragmentation of guidance and counselling still remains a threat to quality and the effective delivery of guidance. Guidance in most countries is still delivered by a variety of actors and coordination remains a challenge. In addition, guidance to employed adults is still not considered a priority by many countries. Many guidance systems focus on youth, unemployed or marginalised groups, neglecting adults' guidance, despite the fact that it could significantly contribute to participation in lifelong learning.

*Initiatives to strengthen transnational mobility.* Several countries are introducing national measures to enhance transnational mobility. A few have adopted mobility as a policy objective. However, in most countries the transnational mobility of learners is still

enabled in the main by the EU mobility programmes. Where national initiatives to enhance mobility are taken they mostly concern HE and very rarely VET, where mobility is currently much lower. Only one country reported actions to improve the quality of transnational mobility.

## 4. SCHOOLS

This chapter reviews recent developments in schools policy in the 32 countries participating in E&T 2010. It considers progress at the pre-primary, primary, lower secondary and upper secondary school levels. VET is dealt with in a separate chapter.

European benchmarks have been set for reducing the rate of early school leaving, increasing upper secondary completion rates and reducing the rate of low achievers in reading. European objectives have also been set for learning foreign languages and increasing Higher Education participation rates in mathematics, technology and science; these have relevance to school education also.

The chapter describes measures to achieve these objectives, as well as progress made in the fields of governance and leadership; private investment; widening access and improving equity; gender issues; learning outcomes based approaches; quality assurance; learning partnerships; pre-primary education; modernising curricula and assessment arrangements; and teachers' education and training needs.

### 4.1. Modernising curricula and assessment arrangements

Curricula and assessment arrangements have been modernised to achieve a number of objectives, including a more competence-based approach and a 'learning outcomes' approach.

The majority of countries referred to international work on pupil assessment being reflected in national curricula. Initiatives referred to by many countries include the Recommendation of the European Parliament and Council on key competences for lifelong learning, and the Programme for International Student Assessment (PISA).

#### 4.1.1 Competence-based approach

The Recommendation on key competences for lifelong learning was adopted by the Education Council on 14 November 2006<sup>19</sup>.

The Cluster on Key Competences and curriculum reform has looked into ways of supporting schools to move towards competence-based approaches. However, while the cluster has seen a competence-based curriculum as necessity, it has also stressed the need to examine how different factors (teacher education, pupil assessment, evaluation of schools, partnerships etc) affect the culture of learning that can support the development of learning skills and transversal competences such as entrepreneurship and social and civic and cultural competences.

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<sup>19</sup> Recommendation of the European Parliament and of the Council on key competences for lifelong learning (2006/962/EC):  
[http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l\\_394/l\\_39420061230en00100018.pdf](http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l_394/l_39420061230en00100018.pdf)

Amendments have been made to educational objectives to take into account the acquisition of key competences. Seventeen countries mentioned key competences (**AT, BE nl, BG, CY, CZ, DE, EL, ES, FR, HU, IS, LT, NL, NO, PL, SI, SK**), although only one – **Spain** – explicitly made reference to the EU Recommendation. All countries confirmed that these key competences are being incorporated into their national educational curricula and some of them mention the key competences included, namely abilities to: learn; communicate; solve problems; cooperate; develop understanding of other people (including tolerance of other people and cultures); and understand the environment and nature. The importance of language skills, including learning a foreign language from a young age, was also frequently mentioned (**CZ, DE, EL, FR, LT, SK**) and a focus on ICT and Maths, Science and Technology (**BG, ES, IT, SK**).

#### *4.1.2 Learning outcomes approach*

Some countries indicated that amendments were necessary in order to achieve outcome-based education systems, and a number of countries reported greater changes in their education framework (**BG, CY, CZ, EE, FI, HR, HU, IE LI, NO, SE, SK**). For example, in **Slovakia** a two-level educational system based on national and school curricula will be created. In **Poland**, a proposal is being considered to lower the age of entry to compulsory education to six years. In **Italy**, there will be an increase of compulsory schooling, with effect from the 2007-08 school year, until the second year of secondary school. The aim is that pupils obtain a secondary school or vocational qualification of at least three years duration by the age of 18, consequently raising the minimum working age from 15 to 16. Also in **Cyprus** major changes are planned (Text Box 4.9).

Most of the countries that reported on learning outcomes based approaches have made significant changes to their national systems, moving from an input to a learning outcomes based approach and / or creating tools to achieve effective implementation (**AT, BE fr, BG, CZ, DE, DK, ES, FR, HR, HU, IS, LI, LU, NL, NO, RO, SK, TR**). For example, **Austria** is running a pilot project on moving towards education standards and away from input steering<sup>20</sup>.

Preliminary results from a European comparative study<sup>21</sup> of the use of learning outcomes confirms this change towards a learning outcomes based approach. While documenting that this shift in emphasis influences the way curricula are designed, and assessment is organised, the study, also illustrates that countries define learning outcomes in different ways and that the long term impact of this shift is somewhat uncertain. In the study several countries emphasise that there is a need to balance input and outcomes based approaches, fearing that an outcomes based perspective may weaken attention to teaching content and pedagogical approaches.

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<sup>20</sup>In an input steered system, effectiveness of education is mainly measured on the basis of inputs, such as course credits earned and hours spent in class, whereas results or outcomes

<sup>21</sup>European centre for development of Vocational training (Cedefop): *Comparative study of the shift towards learning outcomes in European education and training policies*. Forthcoming 2007

At least two countries (**BG, EL**) emphasised the importance of the link between learning outcomes (competences) and labour market needs.

Several national reports (**DK, EL, HR, IS, IT, LT, LU, NL, NO, SE, TR**) report changes to curricula and / or assessment measures to assist in the implementation of an outcome-based approach. In most of these countries the national curricula build on defined outcome competences and schools prepare specific school curricula based on the reforms. **Norway** has adopted a new curricula framework (Text Box).

#### **Text Box 4.1 Modernising school curricula in Norway**

*In Norway the new primary and secondary education curriculum was developed as part of the Knowledge Promotion Reform. It comprises three parts:*

- *The Core Curriculum: which establishes binding foundation and values;*
- *The Quality Framework: which states the responsibility for school and training establishments to organise and adapt the teaching and learning processes for the purpose of developing broad competences and integrating key competences;*

*Subject Curricula: which identifies clear objectives for pupils and apprentices' competences and learning outcomes.*

#### **4.1.3 Assessment**

With regard to assessment measures, some countries report on reforms (**DK, EL, ES, FI**). In **Denmark** (Text Box 4.10), reforms of both school leaving examinations and national tests have been made. **Poland** is also modernizing its curricula in selected areas.

#### **Text Box 4.2 Denmark - reform of assessment arrangements**

*From spring 2007 final examinations in primary and lower secondary education were made compulsory in specified subjects. Pupils are examined in seven subjects, five of which are compulsory: written and oral Danish, written mathematics, oral English, and oral examinations in physics/chemistry. Previously, the pupils themselves had to enrol for the examinations. This reform has been implemented to ensure that the schools get a clear picture of whether all pupils have achieved sufficient skills and knowledge to be able to commence and complete a youth education programme.*

*Separate national tests are arranged for pupils at specified levels in certain subjects. These compulsory national tests are computer-based and adaptive.*

New marking systems will be introduced in **Sweden** and **Denmark**. In **Denmark** they will be specifically adapted to facilitate international comparisons.

A new kind of school leaving examinations have been newly introduced in **Hungary**, which also abandoned the university entry examination.



#### 4.1.4 Other examples of curricular development

As concerns other specific changes to the curricula, the following have been indicated:

- Individualised approaches. Several countries highlighted that pupils' individual needs and talents are (to be) taken into account to a higher degree through recent reforms (**BG, CZ, DK, EE, HR, IT, LI, SI, TR, UK**). This is done e.g. by changing the assessment of study results to enable schools to be more flexible and responsive to learners' needs and abilities (**DK, EE, SI**), but also by giving motivational and proactive methods priority in teaching (**CZ**). In at least two countries the maximum number of pupils in a class has been reduced (**AT, TR**).
- Workload. A decreased workload for pupils is foreseen in **Estonia**.
- New books. For the implementation of the new curricula, two countries indicated that new course material and didactic material is being developed (**BG, EL**).

A review of studies done under the ICT cluster showed that ICT has an impact on competency development, like team work, independent learning or higher order thinking skills. These competencies are not included in the curricula and would require new assessment models.

The need to foster entrepreneurship competence has been strengthened in many countries' curricula. New entrepreneurship initiatives are reported in (**CZ, EL, ES, LU, NL, IS, IT, PT, SE**).

#### Text Box 4.3 Cyprus - modernising school curricula

*In **Cyprus** a complete restructuring of the National Curriculum has been decided and should be introduced under the general Education Reform. Features of the restructuring process include: introducing new technologies as teaching tools, the identification of new competences and priorities, applying the Common European Framework of reference for Languages, adopting multi-disciplinary approaches in teaching, and integrating a European dimension to teaching.*

No information was provided for some countries (**BE nl, EE, FI, IE, MT, SE, MT**).

#### 4.2. Quality assurance in schools

##### Assessing the quality of schools

The 2001 Recommendation of the Parliament and the Council on cooperation in quality evaluation in school education<sup>22</sup> identified a range of issues that support successful schools, and recognised the need to ensure the quality of teaching.

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<sup>22</sup> OJ L60, 1.3.2001 p. 51

Self-evaluation for schools has recently been introduced or received increased importance in a few countries (**CZ, DE, IS, LU, PT, SI, TR**).

To monitor education, information systems have been created to collect targeted and effective data; for example, in **Lithuania** an Education Management Information System has been in use since 2006 to collect data according to the list of State Education Monitoring Indicators.

In a few countries schools' performance evaluation reports are made public to increase accountability and transparency (**BE nl, CZ, MT, NL, PT, SE, UK**). Legislative changes are also envisaged in **Slovenia** which will prescribe the introduction of trained quality teams in institutions.

#### **Text Box 4.4 UK – "light touch approach" where quality is proven**

*The quality assurance system in the **UK** is introducing a "light touch approach" for schools where quality is proven. In the **UK** the quality assurance system is independent from government, with separate Inspectorates in each of the four countries. A rigorous system with strong targets and inspection processes was established in the 1990s with the particular aim of assuring the quality of education available to socially excluded groups and areas. The system is considered successful and quality expectations have been firmly embedded. Now that the system is in place recent policy initiatives have focussed on a "light touch approach" through which schools that have demonstrated their abilities will be less frequently and rigorously inspected whilst the focus is put on schools and areas where improvement is required.*

Major reforms are foreseen in some countries (**BE nl** and **fr**, **CZ, MT**). For instance, **Belgium nl** is considering introducing a more focussed review based on risk indicators. The **Swedish** government indicates that the assessment should be more rigorous and has announced its intention to increase the number of school inspections from 2008 (at least every three years instead of the current six).

In **Bulgaria**, a supplementary teacher's qualification for competencies in the use of modern pedagogic tools has been introduced.

#### Assessing pupils' competences

PISA assessments and the use of national / international standards are mentioned by several national reports as important tools to assess pupils' competences. In most countries national tests of basic skills are undertaken. In **Croatia** this is new.

A number of relevant amendments to the Act on Primary and Lower Secondary Education were recently adopted in **Denmark** (Text box 4.3).

#### Text box 4.5 Denmark – Recent changes in assessment methods

*In 2006 a number of amendments were made to the Act on Primary and Lower Secondary Education in **Denmark** to strengthen quality and raise standards, including:*

- *Ongoing evaluation of pupils;*
- *Minimum one individual plan per pupil per year;*
- *Introduction of 10 national tests during school time<sup>23</sup>;*
- *Compulsory final examination in more subjects than before;*
- *Quality reports for the school system in each municipality; and,*

*Establishment of a Council for Evaluation and Quality Development of Primary and Lower Secondary Education.*

The **Dutch** national report mentioned cohort studies to track the development of groups of pupils. Periodic measurements set the levels for different subjects.

Measures to increase teachers' competences in pupil assessment are being implemented in a number of countries, for example, **Norway**.

#### 4.3. Teachers' learning and training needs

Teacher education and development is a continuum running from initial pre-service education to induction for newly qualified teachers and in-service / continuing professional development.

Common European Principles for Teacher Competences and Qualifications were drawn up in 2005 and discussed at a conference attended by experts from all Member States.

These Principles are reflected in the European Commission's Communication 'Improving the Quality of Teacher Education' that was adopted in August 2007.

This points out that the current situation is that:

- Many countries report shortfalls in teaching skills, and difficulties in updating teachers' skills;

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<sup>23</sup> As part of the evaluation of pupils' benefit from teaching, the Ministry of Education is having a number of compulsory national tests prepared. The tests are to be used so as to a higher degree be able to organise teaching with its point of departure in the individual pupil's strengths, weaknesses and potential. The pupils are to complete the following tests: (a) Danish with a focus on reading in 2nd, 4th, 6th and 8th grades (b) English in 7th grade. (c) Mathematics in 3rd and 6th grades. (d) Geography in 8th grade. (e) Biology in 8th grade. (f) Physics/chemistry in 8th grade. From the school year 2006/2007 tests in reading and in physics/chemistry are to be introduced in 8th grade, and mathematics in 6th grade. The other tests are to be introduced from the school year 2007/2008.

- The teaching profession has a high percentage of older workers (the proportion of teachers aged between 45 and 64 is over 40% in many countries)
- In many Member States there is little systematic coordination between different elements of teacher education, leading to a lack of coherence and continuity, especially between a teacher's initial professional education and subsequent induction, in-service training and professional development;
- Incentives for teachers to carry on updating their skills throughout their professional lives are sometimes weak.
- The amount of in-service training available to practising teachers is limited. It is compulsory in only eleven Member States, and teachers are not explicitly obliged to undertake it in all of these states. Where it exists, training generally amounts to three days per year, and never exceeds five days per year. Furthermore, the fact that in-service training may be compulsory says little about actual participation rates.
- Only half of the countries in Europe offer new teachers any systematic kind of support in their first years of teaching.
- Explicit frameworks to assist teachers who experience difficulties in performing their duties adequately exist in only one third of countries.

The Communication argues for:

- An adequately funded, coordinated, coherent system of provision for teacher education and development at national level;
- Systems that ensure that at every point in their career, teachers have the full range of subject knowledge, attitudes and pedagogic skills to be able to help young people to reach their full potential.
- Teachers being able to take charge of their own learning pathways and to develop new knowledge about education and training through reflective practice.
- Teacher education programmes be available in the Master and Doctorate (as well as the Bachelor) cycles of higher education.
- A teaching profession that fully reflects the diversity of the society in which it operates.

#### Teacher education / qualifications and induction

Reforms of initial teacher education have been undertaken in several countries (**AT, BE nl, BG, CY, DE, EL, DK, ES, FR, IE, IS, LI, MT, SI, UK**). Changes range from a major reform of initial teacher training focusing on more effective practice during initial training and better mentoring during the induction period to an increase from three to five years of the education of teachers at the pre-primary and compulsory stages in for

example **Iceland**, to introduction of short-term and long-term qualification courses in ‘new educational contents in innovative training methods and multicultural environment’ in **Bulgaria**. **Cyprus** has introduced changes in order to improve initial and in-service training.

#### Continuing Professional Development

Initiatives in the area of ongoing training for specific purposes have been reported by the majority of countries (**AT, BG, CY, CZ, DE, DK, EE, ES, FR, MT, HR, HU, IE, IS, IT, LI, LU, NL, PL, PT, SE, SK, UK**). Changes in teacher training stem from changes in education curricula and new requirements placed on schools, e.g. increasing differentiation or individualisation of teaching, demands on ICT skills and languages, new forms of group or independent work by pupils, integration of children with special needs, the introduction of compensatory programmes, increased broader education on the function of schools, inclusive education, new forms of team work by teachers, and the preparation of curricular and other documents. In **Lithuania** a number of projects are in place with the aim of renewing the infrastructure of 34 regional institutions of teacher qualification improvement.

New systems for teachers’ career development are being elaborated in the **Czech Republic** and also just approved in **Portugal**.

Regrettably, no information on any changes in the financial resources allocated to teacher training, or any changes in the amount of in-service training undertaken by teachers, is available in the national reports

No information was reported from **Romania**.

#### **4.4. School Leadership**

In relation to the related issue of school leadership, the key issues are the recruitment and training of school heads and their powers to develop schools in terms of further training of staff, curricula and financial issues.

Evidence of the increased interest in this topic is the fact that many Member States are actively involved in the work of the Cluster ‘Teachers and Trainers’. This has identified policy on the training and development of schools leaders as a priority issue (see also chapter 7 section 1.4.2. (ii). Further, many European Union Member States are taking part in the OECD Programme “Improving School Leadership” and the OECD study “Teaching and Learning International Survey”, launched in 2006. The latter is investigating the management styles of Heads of School to provide models of school leadership. **Denmark** will host the programme's final conference in the spring of 2008.

#### Text Box 4.6 Austria – School management and leadership

*In **Austria** school management structures are being reorganised in order to simplify and expand autonomy. Among others the following measures are planned: creation of regional education directorates; implementation of the one-stop-shop principle in the field of education by abolishing overlaps; creation of the option to reorganise school districts; introduction of a middle management for schools. With the creation of the so called Leadership Academy in 2005, a nation-wide project across all institutions for the qualification of leaders in the pedagogic field aims at using the high skills potential of school managers and fostering it in networked school development projects.*

With regard to the monitoring of the heads of schools' and teachers' performance, two countries highlighted new models. In **Bulgaria** a system for criteria and indicators for quality evaluation on a regular basis is under development, and in **Turkey** a 'Performance Management Model in School' has been established. **Bulgaria** has also established a National Institute for Heads of Schools Training.

#### 4.5. School Governance

School autonomy and accountability are emphasised in many national reports (**AT, BE nl, BG, CY, CZ, DE, DK, ES, FI, FR, HU, IT, LU, MT, PL, RO, SK, SI, UK**), although these terms mean different things in different contexts.

In several countries (**BE nl, ES, FI, IT, HU, NL, IS, SE, UK**) decision-making powers have either always resided with local or regional authorities or were transferred from central to regional or local authorities some time ago. Other countries report progress in this area in recent years (**AT, BG, CZ, EE, IT, RO**).

Recent developments include the following examples. The decentralisation of the school system, including increased autonomy of schools, is highlighted as a milestone in **Bulgaria** and involved restructuring of all authorities and tasks of the responsible institutions. In the **UK** (England) recent initiatives include the creation of a new form of school; so-called 'Trust Schools', which are autonomous but state funded. In the **Czech Republic** the state will no longer create educational programmes binding for schools without the possibility of taking into account specific requirements of schools. In **Denmark** general upper secondary schools have received independent status as from 1 January 2007.

Both the extent of school autonomy and the focus on particular issues vary between countries. In a number of countries the financing and setting up of schools are still part of the powers of the central government. In these cases more operational budgetary decisions may be delegated to schools. In the **UK** (England, Scotland and Wales) the opening and closing of schools is a local authority matter, with central government only involved in resolving disputes; Local Management of Schools means that finances are handled by each head teacher. In other countries schools have full competences to decide on the finances (**RO, SK**). With regard to the establishment of schools, in **Bulgaria** this is decentralised to local (municipality) level. In **Sweden**, since July 2006, privately run pre-schools and leisure-time centres for school-age children have had an even more

pronounced the right to establish themselves. The change means that municipalities will be required to approve private pre-schools and distribute grants for activities if these institutions fulfil quality requirements and are open to all children.

Setting general standards for the quality of education is, in general, still a central level competence. One exception is **Denmark**<sup>24</sup> where this is a local (municipality) level competence.

Only one country indicated that a mainly centralised system is still in place (**CY**). However, a debate about increased autonomy of schools has been launched.

New initiatives to increase the importance of school boards / partnerships involving teachers, students and parents are highlighted by several countries (**AT, BG, LI, LU, MT, TR, UK**). One example of particular interest has been developed in **Malta** (Text Box 4.8).

#### **4.6. Stakeholder consultation and cooperation**

Consultations occur at different levels (school level, local, regional and national levels), take many forms and are created for a great variety of purposes, e.g. formal or ad hoc consultation committees for policy making, partnerships for school governance / evaluation of schools or to improve cooperation between schools and businesses.

Formal consultation committees have been established at national level in at least three countries. In **Lithuania** and **Iceland** the relevant Ministry consults teacher unions or organises meetings with rectors. A cooperation agreement has also been established with the National Parents Union. In **Bulgaria** co-operation and consultations are undertaken in a formalised way in the National Council for Three-party cooperation. In **Cyprus**, there is along tradition of consultations with stakeholders and new bodies have been established in order to enhance it.

Ad-hoc consultations are taking place at local level in **France**, where civil society is consulted by local authorities, involving different stakeholders depending on subject. In The **Netherlands**, ad-hoc consultations take place at a national level whenever new policy is developed. The Sector Strategy Documents came about after a nation-wide consultation by the Minister; all stakeholders (including parents and young children) were involved in the consultations. In **Estonia**, stakeholders made inputs to a major policy-making initiative (Text Box 4.7).

##### **Text Box 4.7 Estonia - Stakeholder consultations**

*In **Estonia** the preparation of the Development Plan for General Education 2007-2013 involved consultations with a wide variety of stakeholders, including: teachers and education managers organisations; the local government association; parents' association; the Estonian Union of Child Welfare; institutions of higher education; Non-*

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<sup>24</sup> Implemented through the Act on Primary and Lower Secondary Education, amended in 2006.

*Estonians' Integration Foundation; Information and Communication foundation Tiger leap and representatives of Ministries.*

In both **Germany** and **Hungary** structures have recently been set up for activities for pupils outside of school hours (in Germany referred to as 'daylong schools'), which involved consultation and partnership between relevant institutions and organisations at local level. Co-operation with parents and other educational institutions is developed through various projects.

#### **Text Box 4.8 Malta – Parents in education programme**

*In **Malta** the Foundation for Educational Services runs a Parents-in-education programme through which teachers are trained in stimulating parental participation in curricular matters. The initiative also involves training parents to deliver "parent to parent" short courses for other parents on issues of common concern. This initiative will be developed to create flexible part-time work opportunities for trained parents in the education sector and develop their skills portfolio.*

#### **4.7. Learning partnerships**

Partnerships to link labour market needs and education were highlighted by **France** (Text Box 4.6), **Spain** and **Germany**.

#### **Text Box 4.9 France - Partnerships to link labour market needs and education**

*In **France**, pupils in the third level have the option of spending 3 hours each week in an enterprise on a voluntary basis. This scheme was piloted in 2005 and established in 2006. In order to ensure the link with businesses, it is compulsory also for those who have not selected this option to spend a few days in an enterprise ('sequence d'observation'). To favour equal opportunities, additional cooperation agreements have been signed with enterprises, associations or professional federations. Those who have signed provide their expertise to allow pupils from disadvantaged areas to meet the enterprise world.*

Information for a number of countries is similar to that included in Chapter 6 on VET and adult learning and has not been elaborated in this section (**BE fr, CZ, EL, NL, NO, PT, RO, SK, TR**). No information was provided for some countries (**BE nl, DK, FI, LI, SE**).

#### **4.8. Widening access and equity in participation, treatment and outcomes**

Two countries highlighted equal access to education and quality of education as an area of particular current priority, namely **Romania** and **Czech Republic**.

In terms of concrete initiatives to widen access to education, the needs of the following groups have been given particular attention:

- Children and young people with special needs, including disabled children;



- Socio-economically disadvantaged children;
- Ethnic minority groups;
- School drop-outs (further discussed in section 4.12); and,
- Exceptionally talented.

Measures have been aimed at curriculum development, extending and increasing flexibility of (second chance) education, and capacity building (teacher qualification and training, and training of school mediators and mentors etc.).

The Cluster on Access and Social Inclusion in Lifelong Learning has a very high level of Member States' participation indicating a significant awareness of the importance of guaranteeing equity in education. The work of the Cluster has, at the same time, shown the difficulty of such an effort. It has, however, clearly appeared that, in terms of cost /benefits strategic and systemic interventions to ensure widespread quality, flexibility and access are in most cases more efficient than compensatory actions aimed at repairing damages (see also section 7.2.2 (v)).

#### *4.8.1 Children and young people with special needs, including disabled children*

Many countries reported on the elimination of barriers to education and training for people with disabilities and special needs both through the elimination of physical barriers and through the provision of specific support. Countries differ significantly as regards policies on how students are labelled as disabled and how schooling can be better adapted to their needs. In **Italy**, for example, disabled children are completely integrated in regular classes with support provided by specialised teachers. Besides concepts seems to be evolving, as shown by the reported increased numbers of special needs or disabled children reported in **Finland** and **France**<sup>25</sup>. Particular measures to assist children with special needs include the development of personal curricula / approaches (**BE nl, CY, DE, DK**<sup>26</sup>, **FI, FR, IT**), the development of quality standards for special education (**AT**) and the creation of Special Education School Units (**EL**). **Portugal** has launched a wide action Plan until 2009. In relation to schools it includes a new legal framework for the support of students with special educational needs and creation of six "New Opportunities Centres" for the development of recognition, validation and certification (RVCC) of competences for certain disabilities, developing RVCC methodologies adapted to this population.

Trends vary with regard to the involvement of children with special needs / disabilities in mainstream education or in specialised institutions. On the one hand, the **Swedish**

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<sup>25</sup> Two countries reported increasing numbers of special needs or disabled children. In Finland the number of special needs pupils has increased greatly in both special education schools<sup>25</sup> and vocational institutions in recent years: about 11% of pupils in vocational education need special instruction. In France the number of children identified as disabled increased from 96,100 in 2000 to 151,500 in 2006. However, national reports provided no information on the reasons for these increases.

<sup>26</sup> In Denmark this has become a requirement for all pupils, not only those with special needs.

national report describes a minor re-introduction of schools for visually impaired persons and those with multiple functional disabilities or serious language impediments. On the other hand, in **Slovenia**, increased funds have been devoted to including children with special needs in mainstream education<sup>27</sup>. Practical measures to improve education infrastructure, including transportation to schools, have been undertaken in **Romania**.

Initiatives relating to qualifications and the capacity building of teachers or teacher assistants who work with pupils with special needs have been launched in several countries (**DK, ES, FR, MT, NO, SE, SK**). For example, the Ministry of Education in **Malta** offers a 70-hour induction training course and University courses at certificate or diploma level for educators to work with pupils with special needs in class. A one-week training course has been provided to those who work with sick pupils in their own homes. Peripatetic teachers provide special assistance in **Slovenia**.

Only few countries reported on shortcomings: **Finland** reported a mismatch between demand and supply, absence of learning materials, restrictions on accessibility and lack of available support facilities for disabled pupils in post-compulsory education. In the **Netherlands**, the parallel existence of different structures for pupils with special needs has led to a lack of clarity concerning responsibilities for pupils with special needs. This has resulted in pupils not receiving the support needed. Both these countries are preparing comprehensive measures to deal with these shortcomings.

#### 4.8.2 Socio-economically disadvantaged children

Not surprisingly countries report that socio-economically disadvantaged children have lower participation and results than other pupils (**BE fr and nl, CY, PL**).

Four countries focus their efforts to increase participation and results of pupils with a socio-economic disadvantage<sup>28</sup> on specific geographical areas (**CY, HU, PL, SI**). In three of these (**HU, PL, SI**), increased capacities are devoted to rural areas.

#### Text Box 4.10 Cyprus – Educational Priority Zones

*In **Cyprus**, positive results have been achieved by working with ‘Educational Priority Zones’ (EPZ)<sup>29</sup>. The pilot operation of EPZs had, inter alia, the following positive results:*

- *In the school units covered by EPZs there has been a reduction of pupil drop-outs, of school failure (referrals and repetitions) and of referrals to the Educational Psychology Service, as well as improvement of school success.*
- *Support for foreign language speaking pupils has led to increasing their entry into the*

<sup>27</sup> Since 2004 the number of Slovenian pupils with special needs included in mainstream schools has increased threefold.

<sup>28</sup> National reports in general do not use this exact term, but it is considered that this is in fact what is referred to (terms used include ‘disadvantaged’, pupils with a ‘disadvantaged socio-cultural’ background, ‘socially disadvantaged’, etc.)

*educational system of Cyprus, to reducing the number of drop-outs and to improving their performance.*

- *Increase of school presence and of the proportion of enrolment and attendance of Roma pupils.*

Financial aid in terms of provision of, for example, free lunches and school material etc. is a common measure to assist socio-economically disadvantaged pupils (EE, EL, HU, IT, LT, PL, SI, SK, UK). In Greece, computers are offered to pupils from such backgrounds.

Three countries (DE, LU, UK) have introduced “extended schools”<sup>30</sup> offering a wide range of out of hours’ activities. In Germany the introduction of these daylong schools is supported by the federal level with 4 billion euro from 2003-2009 with the aim of providing individual support to all children.

In three countries children with a socio-economic disadvantaged background have prioritised access to pre-school (CZ, HU, NO).

#### *4.8.3 Ethnic minority groups and migrants*

As regards initiatives to respond to the needs of cultural or ethnic minorities<sup>31</sup>, most country reports focus on the acquisition of language skills. Language teaching in both minority languages (mother tongue) (AT, CZ, EE, EL, FI, HR, RO, SE, SI) and the ‘host’ country language (AT, BE nl, CY, DE, EE, ES, DK, EL, FI, IS, LI, LU, NL, SE, SI) was highlighted as crucial to assist pupils from ethnic minority backgrounds to access and benefit from the school system. Most countries have had such measures in place for several years. In Lithuania a strategy was developed in 2006.

The Netherlands has replaced ethnic minority arrangements by ‘learning plus’ schemes to deal with poverty. Special classes for Roma children have been abandoned by Slovenia<sup>32</sup> whereas other countries have ongoing programmes for this target group. Poland has specific provisions for national and ethnic minorities in national programmes.

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<sup>29</sup> Each zone consists of one Gymnasium (lower secondary school), the main primary schools and kindergartens linked with these schools in areas with a pupil population predominantly coming from families of a low socioeconomic and educational level. The criteria for defining an area as an EPZ is a high record of school failure and functional illiteracy, a high share of foreign or foreign language speaking pupils, drop-outs and high incidence of violent and offensive behaviour.

<sup>30</sup> Referred to as daylong schools in Germany.

<sup>31</sup> See also *Report on Racism and Xenophobia in the Member States of the EU*, the European Union Agency for Fundamental Rights (2007) chapter 5.

[http://fra.europa.eu/fra/material/pub/racism/report\\_racism\\_0807\\_en.pdf](http://fra.europa.eu/fra/material/pub/racism/report_racism_0807_en.pdf)

<sup>32</sup> Each year, the Slovenian ministry and representatives of the Roma prepare an action plan with specific measures for the implementation of solutions from the strategy.

In several countries, over 10% of pupils aged 15 have parents who were born abroad<sup>33</sup>; some Member States are facing this phenomenon for the first time. To a number of member states dealing effectively with the increasing cultural diversity in classrooms presents a challenge. Most immigrant students are motivated learners and have positive attitudes towards school<sup>34</sup>; however, there is concern in several European Union countries that students with an immigrant background often perform at levels significantly lower than their native peers. Minority-background pupils may be subject to less favourable treatment in society at large and in the educational system than the rest of the population and may therefore suffer severe inequalities in access to and benefits from education. The European Monitoring Centre on Racism and Xenophobia, for instance, has pointed out that this is the case for Roma children in some Member States.<sup>35</sup>

Several countries refer to initiatives for ethnic minorities and migrants already at pre-primary education level (**AT**, **BE nl**, **EE**, **EL**, **HR**, **HU**, **IS**, **NL**, **NO**, **PL**). These initiatives mainly refer to learning the 'host' country language. For example, in **Belgium nl** additional pre-primary school teachers will contribute to smaller classes, thus providing more opportunities for children to develop communicative skills in the language of instruction.

#### **Text Box 4.11 Norway - Priority admission to "Kindergarden"**

*In **Norway** immigrant children can be entitled priority for admission to "Kindergarden". This is not a given priority in the Kindergarten Act (section 13), but the local authority and the kindergarten owners can in the statutes of the kindergarten give priorities in the admission criteria (section 7 pursuant to regulations according to section 12). The rationale for giving local priority admission for special groups is that the children might have special educational needs, and that Kindergarten will give them the possibility for play and interaction with other children and skilled staff to promote their development. For immigrant children, the Kindergarten has a dual function in terms of language development (both mother tongue and the Norwegian language development). The Kindergarten Act states that kindergartens shall take account of children's functioning, gender, and social, ethnic and cultural background.*

Apart from language learning, wider strategies are being implemented in a number of countries. In **Germany**, the FörMig programme (Assisting children and young people from a migration background) increases support in language learning and plans the transition to employment. In **Spain**, the "Plan for Citizenship and Immigration" (2007-2010), addressed towards the immigrant population, has made education, particularly at school level, its first priority, and additional resources will be devoted to it.

The Cluster on Teachers and Trainers has identified a widespread concern amongst teachers and other educational professionals who feel that they have not been adequately prepared to deal with heterogeneous classes, including the growing number of classes

<sup>33</sup> Integrating immigrant children into schools in Europe, Eurydice, 2004

<sup>34</sup> Where immigrant students succeed, OECD, 2006

<sup>35</sup> Roma and Travellers in Public Education, EUMC, 2006

with pupils from several different cultural, linguistic or religious backgrounds. The Cluster has identified some good practice in this field (see also section 7.2.2 (ii) and (iv)).

A number of countries have a particular issue with providing effective and accessible education for Roma pupils. The overall education level of the Roma population is far below that of the majority population in all European countries. Even though there are some improvements in absolute terms (most Roma now attend at least primary school), in relative terms the inequality gap in relation to the majority population does not seem to improve. By adhering to the Decade of Roma Inclusion in 2005, governments of Central and South Eastern Europe (**Bulgaria, Croatia, the Czech Republic, Hungary, FYROM, Montenegro, Romania, Serbia, and Slovakia**) committed themselves to improve the socio-economic status and social inclusion of Roma with a priority on education. However, reviews of what has been done so far indicate that progress is not sufficient.

#### *4.8.4 Equity in participation, treatment and outcomes*

According to the Commission's Joint report on social protection and social inclusion, "Children have a higher-than-average risk of poverty in most Member States. In some, almost every third child is at risk. Deprived children are less likely than their peers to do well in school, stay out of the criminal justice system, enjoy good health, and integrate into the labour market and society"<sup>36</sup>. Poverty affects their cognitive development and, ultimately, their academic achievements.<sup>37</sup> In general, young people brought up in a less advantageous socioeconomic environment are more likely to leave school early.<sup>38</sup>

Several countries describe initiatives to ensure that pupils from low-income families have the same opportunities as other pupils to take part in education and achieve good results. In terms of results, the **Polish** national report indicates that there are considerable disparities between rural and urban areas in terms of participation in pre-primary education<sup>39</sup>. The **Belgian fr** report highlights that varying results according to pupils' socio-cultural origin were noticeable in the PISA tests, but also in the national evaluations undertaken. This was confirmed by the **Belgium nl** report. In relation to equal treatment, countries refer to segregation and discrimination being forbidden in schools (**CZ, HU, RO**), and to positive actions in terms of implementation of social inclusion measures.

The 2007 national reports have provided little detail on the extent to which the initiatives have improved individuals' opportunities, participation, treatment and outcomes. Some countries do provide information on which groups of pupils (e.g. minority language

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<sup>36</sup> Joint report on social protection and social inclusion, 2007.

<sup>37</sup> A thematic study to identify what policy responses are successful in preventing child poverty, European Commission, DG Employment and Social Affairs, 2006

<sup>38</sup> Study on Access to Education and Training, Basic Skills and Early School Leavers, European Commission, DG EAC, 2005

<sup>39</sup> This results from, amongst other things, the employment structure of the Polish population and the limited nursery school infrastructure in rural areas. With a small number of children attending, some nursery schools are closed down by local government units due to high maintenance costs.

groups, pupils from a socially disadvantaged environment or from low-income families) have difficulties, but no information on improvement of rates is provided. Most national reports describe initiatives that will be implemented and not their results. However, the **Cyprus** report described positive results in terms of participation and achievement.

#### *4.8.5 Exceptionally talented pupils*

Some information has been provided in the 2007 national reports on schemes for exceptionally talented pupils, including how their individual needs are to be taken into account (**CZ**, **DE**), additional funding for gifted children programmes (**HR**), and a reform of the A-levels in the **UK** to stretch the most capable pupils. Talented pupils in **Germany** are progressively having the possibility to participate in university courses.

In **Malta**, on the other hand, the current distinction between the Junior Lyceums for higher attainers and the Area Secondary Schools for lower attainers is gradually being phased out by bringing them closer together through the College system of networking primary and secondary schools.

### **4.9. Gender issues**

The 2007 national reports include little information on the performance of girls relative to boys. The 2005 report "Explaining Student Performance"<sup>40</sup> shows that in all countries concerned, girls achieved significantly higher average reading scores than boys. On the other hand, in science and mathematics, boys achieved better results, but the differences were smaller than for reading. The report concludes that 'both the relative underperformance of boys in reading and girls in mathematics and science should be considered a problem.'<sup>41</sup>

**Bulgaria** reported overarching changes to promote gender equality. A new educational structure is foreseen in the School and Pre-School Education National Programme (2006-2015) as a measure to overcome inequality. A National Council on Gender Equality has been established.

Informing students of their rights and obligations concerning gender equality and emphasising the importance of non-traditional choices is taking place in several countries (**AT**, **BE**, **fr**, **HU**, **NL**). In **Austria** for example, special advice centres for girls on non-traditional education opportunities have led to improvements in their participation rate.

The **Netherlands** highlighted 'unseen gender distinctions' in interactions in the classroom. Several countries report on initiatives to build the capacity of teachers to deal with this problem. For example, **Romania** has participated in a project with UNICEF that has developed a compendium of tools for teachers designed to facilitate the inclusion of the gender dimension in school curricula. The **Italian** national report indicated that efforts are being made to increase the presence of male teachers/ staff in schools.

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<sup>40</sup>OECD: Explaining student performance (November 2005)

[http://www.teknologisk.dk/\\_root/media/19622%5FFinal%20report%2DwebFeb06.pdf](http://www.teknologisk.dk/_root/media/19622%5FFinal%20report%2DwebFeb06.pdf)

<sup>41</sup>OECD: *Explaining student performance* (November 2005), p. 97

Initiatives to ensure an appropriate gender perspective in curricula and text books have been taken in some countries (**BG, CZ, IT, SI**). In **Spain** a new subject of education on citizenship and human rights will be introduced in both primary and secondary education, paying special attention to gender equality.

#### 4.10. Pre-primary education

The recent Communication from the Commission<sup>42</sup> on Efficiency and equity in European education and training systems referred to the long-term benefits of identifying educational problems and encouraging the start of learning prior to primary schooling.

New developments in pre-primary education have been reported by many countries (**BE nl, CY, CZ, DE, ES, DK, EE, HR, IS, LU, MT, NO, PL, PT, SI, UK**). The measures relate to one or several of the following: access to pre-primary school; revision of education content; capacity building of teachers; and quality assessments.

In the **Netherlands** the government is strengthening the position of early childhood education for children between the ages of 2.5 and 6 and introducing 'bridging classes' offering intensive language teaching to children with a significant Dutch language disadvantage; in **Estonia** compulsory student assessment is being used to smooth the transition from pre-school to primary school. In **Germany** some Länder have in the last four years developed an output and educational plan for the pre-primary schools, including language development. In the **UK** (Wales) a new 'Foundation Phase' curriculum covering ages 3 to 7 – pre-primary and first years of primary school – has been piloted and will be implemented in 2008.

Several countries referred to increased investment in pre-primary education, either directly through increased public expenditure (**AT, BE nl, CY, DE, EL, ES, HR, IS, NO, PL**) or indirectly through increased numbers of staff in pre-primary schools (**DK, HU, MT, NL, SE, SK, UK**). Only two countries provided figures. In **Spain** a progressive 10% increase of the state budget for children aged 0-2 years will be approved, resulting in a total increase of almost 50% over the next five years. In the **UK** 370 million euro have been earmarked to improve qualifications in the pre-school workforce through the establishment of a 'Transformation Fund'.

Five countries have made or plan to make pre-primary schooling (or part hereof) compulsory (**BG, CY, DK, EL, LU**). In **Bulgaria**, pre-primary education is legislatively regulated as obligatory one year before school start<sup>43</sup>. In **Luxembourg** pre-primary education for children aged 4 and 5 years old has been compulsory since the 1990s.

In **Cyprus** pre-primary education was made mandatory in 2004 and is offered freely in public kindergartens to children between the ages of 4 years and 8 months and 5 years and 8 months. In **Denmark**, the Government is planning to present a Bill to extend compulsory school attendance from nine to ten years by making the pre-school class (at

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<sup>42</sup>COM(2006)481 final of 8.9.2006

<sup>43</sup>School start age is not indicated in the national report or when this requirement was introduced.

age 6) a compulsory part of primary schooling. Teaching in Danish will be introduced, as well as a compulsory language evaluation at the beginning of the pre-school class.

Eight countries did not provide any information on increased investment in pre-primary education (**BG, CZ, FI, IT, LI, LV, RO, SI**).

In relation to access to primary school, increased numbers of pre-school institutions were reported in **Croatia**. In **Norway** children with disabilities / who are the objects of an administrative decision<sup>44</sup> are entitled to priority for admission to kindergarten (Text Box 4.2). In the **UK**, Sure Start, a new type of institution is being introduced (Text Box 4.8).

**Portugal** mentions investment in its pre-primary education system for literacy and numeracy skills combined with experimental and also ICT aimed at aligning pre-primary and primary school learning contents.

#### **Text Box 4.12 Provision of holistic integrated services to children and parents**

*In the **UK** 3,500 Sure Start Children's Centres are planned. These are places where children aged under 5 and their parents can receive a range of services, including help from a multi-disciplinary team of professionals. It is planned that every community should have such a Centre by 2010.*

Investment in human resources for pre-primary education is being increased (**BE nl** and **ES**), in particular to increase the development of children's communication skills. Revisions of teaching content have also been made to increase the emphasis on preparing children to read and communicate (**DE, DK**). In the **Czech Republic** the training of educators working in the pre-school class has recently been reformed with a view to strengthening standards, providing time for thorough study and better opportunities for specialisation.

#### **4.11. Private investment**

Attitudes towards private investment in schools vary between countries. Governments of some countries are against such funding; whilst others consider that it can increase the quality of education. One of the most favourably disposed countries is **Slovakia**, where amendments to education law have been prepared in order to remove obstacles to private investment. The **Slovakian** national report indicated that:

‘Private initiatives induce innovation and effectiveness as well as competition in traditional methods, in manner as well as forms of management. Therefore it is necessary to intensify efforts at ensuring conditions for stimulating private investment into the educational sphere of competent national institutions’.

In contrast, a number of countries indicated that since education must be accessible to all, the government should pay the bulk of the costs. One such country is the **Netherlands**,

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<sup>44</sup>Pursuant to the Child Welfare Service act.



where the government has no policy to stimulate private investment in primary and secondary education.

In the **UK** (England) recent policy developments are aimed at readjusting the balance of resourcing between the state, employers and individuals at all levels, focusing state funding in areas of demonstrated ‘market failure’. In **UK** schools, private contributions are centred on the provision of time and expertise by outside experts and lay people<sup>45</sup>. Private investments are in some countries used for improving infrastructure including the building of schools (**BE fr**, **BE nl**, **DE**, **HR**) or sponsoring specific activities or events (**CY**, **DE**).

Statutory regulations and agreements between the government and stakeholders applying to sponsoring in the primary and secondary education sectors are highlighted by some countries. Some countries also refer to course or tuition fees, expenditure on books and travel expenses as private investments, i.e. costs paid by pupils, participants or their parents.

No data on the relative importance of private investment are available. Three countries (**AT**, **DE**, **SK**) indicated that there have been increases in private investments the last years, facilitated by legislative actions to increase the possibilities for schools to receive funding from private sources.

#### **4.12. Progress towards EU benchmarks**

##### *4.12.1 Reduce early school leaving*

European benchmarks in the field of education set out that by 2010 the rate of early school leavers should be no more than 10%. This would mean that 2 million fewer young people would have left school early compared to 2000. This benchmark should be seen in connection with the benchmark on upper secondary completion rates (see section 4.11.2) as many of the measures used are either identical or complementary under the two.

Data on the rate of early school leavers are available for all the countries participating in Education and Training 2010 (except **Liechtenstein**), though in some cases they are unreliable or not fully comparable due to break in series. Progress between 2004 and 2006 has been slow: in 2004, the EU27 average was of 16%, and in 2006 it was of 15.3%. At this pace, it will be impossible to achieve the 10% benchmark in 2010. In spite of the overall positive trend, in some Member States the situation has slightly deteriorated between 2004 and 2006 (**DE**, **DK LU**, **SE**). Six Member States display rates below or well below the target (**AT**, **CZ**, **FI**, **PL**, **SI**, **SK**). The country with the lowest rate is the **Czech Republic**<sup>46</sup> (5.5%). **Norway** also displays a low rate (5.9%) and so does

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<sup>45</sup> Experienced business people give time to serve as advisers to educational institutions and all English schools have a ‘school improvement partner’ who acts as a consultant to help the school prepare its annual plan or monitor progress.

<sup>46</sup> **Slovenia** showed an even lower rate in 2006 (5.2%). However, data for this country are unreliable due to small sample size.

**Croatia** (5.3%).<sup>47</sup> Six countries report rates higher than 20% (**ES, IT, MT, PT, IS, TR**); two have rates higher than 40% (**MT, TR**).

In 2006, early school leaving continued to affect many more males than females. The difference is particularly acute in countries such as **Greece** (20.7% for males compared to 11% for females), **Spain** (35.8% compared to 23.8%), **Portugal** (46.4% compared to 31.8%) and **Turkey** (56.6% compared to 42.7%).

Initiatives to reduce early school leaving include both preventative and compensatory measures. Some of these are: the adaptation of curricula, a more individualised approach through more flexible forms of education possibilities, improved guidance, second chance programmes, mechanisms for informing parents about absences, and the provision of free course materials and transportation (**BE fr, BE nl, BG, DE, EL, FI, FR, HU, HR, IE, IT, IS LI, LU, NL, NO, PT, SE, UK**).

In some countries, particular measures targeting those at risk have been developed; for example, in **France** the so-called "Personalised Programme for Education Success" (PPRE) is addressed to those pupils who experience difficulties with French, Mathematics and Foreign Languages, which may in turn result in not achieving the objectives of compulsory education. In **Denmark** a 10th school year will be introduced from 2008/09, targeting pupils who are not ready after the 9th grade to immediately commence a youth education programme. Initiatives to promote well-being in schools to cut drop out rates have also been started and in some countries the 'long school day' (provision of activities also outside school hours) has been introduced (**DE, EL, FI, FR**).

#### **Text Box 4.13 United Kingdom - Educational Maintenance Allowance**

*In the **United Kingdom** an Educational Maintenance Allowance has been introduced. This aims to overcome the financial pressures for early leaving by paying a weekly allowance to those who opt to stay in education where family income falls below a defined threshold. The scheme has been successful, with 297,000 young people benefiting in England and 36,000 in Scotland. Evaluation evidence shows that levels of attendance and attainment among EMA recipients increased compared to a control group.*

**Bulgaria** indicated that Roma children have a particularly high drop-out rate: 34.7% leave school at lower secondary education stage. Several important changes are foreseen, including moving away from a system of mixed-age classes.

#### *4.12.2 Improving upper secondary completion rates*

The EU benchmark is an 85% graduation rate, leading to 2 million more people having graduated from upper secondary education in 2010 compared to 2000. This benchmark should be seen in connection with the benchmark on reducing early school leaving (see section 4.12.1) as many of the measures used are either identical or complementary under the two.

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<sup>47</sup> Data for Croatia are however unreliable.

Data on upper secondary completion rates are available for all 27 Member States, but not for all the other countries participating in E&T 2010. The EU27 average in 2006 was of 77.8%, and therefore lower than the 85% benchmark. Progress again has been slow: in 2004, the EU 27 average was of 77.1%. The trend overall has been positive with some exceptions (in **DE**, **LU**, **MT**, **SI** there were small drops in the upper secondary completion rates compared to 2004).

Nine countries report rates above or well above the target (**AT**, **CZ**, **DK**, **IE**, **LT**, **NO**, **PL**, **SI**, **SK**, **SE**). The country with the highest rate is the **Czech Republic** (91.8%), followed by **Poland** (91.7%).

Ten Member States display rates lower than 80% (**DE**, **ES**, **IT**, **LU**, **MT**, **NL**, **PT**, **RO**, **UK**). The lowest rate among Member States corresponds to **Portugal** (49.6%). **Turkey** also shows a very low rate (44.7%).

Some countries reported on efforts in this area (**DE**, **DK**, **EL**, **IE**, **LT**, **NL**, **SE**, **UK**). For example, in **Ireland**, one of the high-level goals under the new National Development Plan 2007-13, and the recently published National Action Plan for Social Inclusion, 2007-16, is to work to ensure that the proportion of the population aged 20-24 completing upper second level education or equivalent will exceed 90% by 2013. With regard to curriculum, the Department's strategies have included widening the educational experience available to students by expanding funding for programmes such as the Leaving Certificate Vocational Programme (LCVP), Vocational Preparation Training (VPT) and the Leaving Certificate Applied (LCA).

#### **Text Box 4.14 Poland special programme for equal opportunities**

*In **Poland** a programme for equal educational opportunities for pupils from families of ex-employees of state-owned agricultural enterprises was adopted in 2006, covering the period 2006-2008. The programme is targeted at pupils living in rural areas or small towns (up to 20 000 inhabitants) and attending upper secondary schools which award an upper secondary school leaving certificate (maturity certificate).*

Several measures have been implemented to increase the upper secondary rate in **Spain**, such as a wider range of upper secondary and upper secondary vocational studies, by means of an open education and an evening regime, a higher number of grants (covering accommodation, transport, etc.), higher degree of flexibility in studies and a richer offer of programmes permitting student mobility in the EU. **Sweden** will reform its upper secondary studies with the intention that they lead either to a vocational qualification, a general qualification or a completed apprenticeship programme, at the same time that they would avoid any dead-ends.

#### *4.12.3 Improve levels of reading literacy among 15 year olds*

EU benchmarks set out to reduce the rate of low achievers in reading literacy by 20% by 2010 (to reach 15.5%), which means that 200,000 fewer 15 years olds would be low performers in reading literacy in 2010 compared to 2000.

Data on low achievement in reading literacy rates are available for 19 EU Member States plus **Iceland**, **Liechtenstein**, **Norway** and **Turkey**<sup>48</sup>. The average for these 19 EU Member States is 19.8%, considerably higher than the 15.5% benchmark.

Four Member States report rates better than the target (**FI**, **IE**, **NL**, **SE**). The country with the lowest rate is **Finland** (5.7%).

Ten countries report rates higher than 20% (**AT**, **DE**, **EL**, **ES**, **HU**, **IT**, **LU**, **PT**, **SK**, **TR**). The highest rates correspond to **Turkey** (36.8%), **Greece** (25.2%) and **Slovakia** (24.9%).

Several countries highlighted actions in this field (**AT**, **BE fr**, **BE nl**, **CY**, **DE**, **DK**, **EL**, **ES**, **FR**, **IE**, **NO**, **SE**, **SI**). Measures (often in the form of specific programmes) range from capacity building of teachers (e.g. improvement of teachers' reading-teaching skills), support teaching to children, improved provision of literature and use of libraries, requirement for schools to devote a certain time per day or week to reading<sup>49</sup>, national reading tests or screening instruments or focus on specific risk or disadvantaged areas.

#### *4.12.4 Mathematics, technology and science*

There are two objectives in the area of MTS: to bring about an increase of at least 15% in the number of graduates in these fields by 2010 and at the same time to address the imbalance between men and women. Even though not explicitly targeting schools, most countries (with the exception of **FI**, **RO**, **SK**) have highlighted in their national policies and/or programmes in the past five years the importance of increasing pupils' interest in subjects such as mathematics and technology, and to a lesser extent other sciences.

In terms of the role of teachers in the overall improvement of standards, most countries highlighted continuing training of teachers as imperative. Teachers must be kept up to date with new developments in the area of new technologies. To improve pupils' performance in mathematics a number of countries have developed specific training programmes for teachers.

A few countries are developing personalised programmes in order to help pupils who may be left behind or are slower in the learning process in order to ensure that this will not impair their abilities to learn later in their education.

Finally, other approaches have also been reported, including the introduction of a scholarship programme 'Path to Science' in **Hungary** and contests and day events organised by the Union of Science Teachers in **Greece**.

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<sup>48</sup> The rates are from 2003. PISA data are being updated and new data are anticipated by the end of 2007.

<sup>49</sup> In **Spain**, primary schools are obliged to devote at least 30 minutes per day to reading in all subjects and in lower upper secondary education in **Belgium fr** one additional hour of French/week has been introduced.

#### 4.12.5 Other objectives

Some progress has been made in relation to the general objective that every citizen should speak at least two foreign languages. In 2005, pupils in upper secondary education learned, on average, 1.5 foreign languages, up from 1.2 in 2000.

Concerning ICT infrastructure, the level of ICT equipment in schools has progressed. In 2006 there were on average 11 computers per 100 pupils in schools in EU. 96% of EU schools had Internet access and 67% had broadband access. ICT use by teachers in Europe was also significant, as showed by a Commission study. Around 90% of classroom teachers surveyed used computers or the internet to prepare lessons and 74% also used them as a teaching aid. Moreover, over 80% believed using computers and the internet in the classroom improve motivation and learning.

#### 4.13. Summary

The 2007 national reports indicate that progress is being made at schools level.

*Modernising curricula and assessment arrangements.* Curricula and assessment arrangements have been modernised at primary and secondary school levels in many countries. These are helping to achieve: more individualised approaches; decreased pupil workloads; agreed key competences; and, improved ICT and language skills.

*Learning outcomes-based approaches.* Several countries have made significant changes to their national systems to move from an input-based to a learning outcomes-based approach and/or have created tools to achieve effective implementation. Tests for pupils and teachers throughout the period of study are undertaken or planned to validate the link between learning outcomes and qualifications. European initiatives (European Higher Education Area, European Qualification Framework) and projects have influenced the shift towards learning outcomes in HE.

*Quality assurance.* Existing schools quality assurance systems vary in several respects, including: the availability of and extent to which external and internal evaluations are undertaken; the level at which these are conducted; and, validation and approaches to the approval of evaluations.

*Teachers' learning and training needs.* Recent developments reported range from reforms of initial teacher training to an increase from three to five years for the education of teachers at the pre-primary and compulsory stages. Initiatives in the area of ongoing training for specific purposes have been reported by the majority of countries. However, as the Commission has pointed out in its Communication on Improving the Quality of Teacher Education, more can be done to ensure that provision for teacher education and development is adequately funded, coordinated and coherent, and that teachers have every encouragement and opportunity to develop their competences throughout their whole career, in a context of reflective practise.

*Governance and leadership.* Increases in school autonomy and accountability processes are seen in almost all countries. However, both the extent of school autonomy and the focus on particular issues vary significantly between the countries.

*Learning partnerships.* There are a variety of learning partnerships with different purposes. Consultation may include: formal or ad hoc consultation committees for policy making, partnerships for school governance and evaluation of schools.

*Widening access and improving equity of participation.* The 2006 Joint Progress Report identified that there was too little progress against those benchmarks related most closely to social inclusion. However, equity in participation, treatment and outcomes and respecting individual needs are key themes in education policies. Across the EU equal access to education and quality of education are being mainstreamed into education policies. This is focussed on respecting pupils' individual needs.

In terms of concrete initiatives to widen access to education, the needs of the following groups have been given particular attention: children and youth with special needs including disabled children; socio-economically disadvantaged children; ethnic minority groups and migrants; school drop-outs; and, exceptionally talented. Measures have been aimed at extending and increasing flexibility of education, and capacity building (teacher qualification and training, and training of school mediators and mentors etc.) Particular measures to assist these children include the development of personal curricula approaches and quality standards.

The national reports provided little detail on the extent to which the initiatives have improved individuals' opportunities, participation, treatment and outcomes. Most national reports describe initiatives that will be implemented and not their results.

There have been recent extensions to compulsory schooling at pre-primary and secondary levels. These moves are seen as important for disadvantaged groups.

*Gender issues.* Recent developments reported in this area include awareness raising activities among pupils and the capacity building of teachers. The national reports give little information on gender issues and it seems to play a minor role in most countries.

*Pre-primary education.* One challenge mentioned in the 2006 progress report was the need for investment in pre-primary education. Several countries emphasised the long-term advantages and savings of identifying problems early and encouraging learning prior to primary schooling. New developments in pre-primary education were reported by many other countries. Five countries have made or plan to make pre-primary schooling compulsory.

*Private investment.* Approaches to private investment in schools are diverse. Some countries are not keen on such funding, whilst others consider it a basis for increasing the quality of education and are revising their legislative frameworks to make this a possibility.

*Progress towards EU benchmarks* on reading literacy (results are however only available for 2000 and 2003; new data will become available in December 2007), completion of upper secondary education and early school leaving, however, is still too slow.

Initiatives to reduce early school leaving are focussed on prevention and reintegration of those who have already dropped out. Existing and planned measures include: the adaptation of curricula, a more individualised approach by providing alternative (more flexible) forms of education possibilities; second chance programmes; mechanisms for informing parents about absences; and, the provision of free course materials and transportation.

Measures to improve reading literacy levels in schools, often delivered in the form of specific programmes include: improvement of teachers' reading-teaching skills, support teaching; improved provision of literature and use of libraries; requirements for schools to devote a certain time per day or week to reading; national reading tests; screening instruments; and, focus on specific risk or disadvantaged areas.

## **5. HIGHER EDUCATION**

### **5.1. Introduction**

The HE sector is situated at the crossroads of research, education and innovation which are the key parts of the knowledge triangle. Integral to society at large, it is a central player in the knowledge economy and key to the competitiveness of the EU<sup>50</sup>. In spring 2000 Lisbon's European Council called for Europe's Education and Training Systems to be modernised in response to the demands of the knowledge based economy<sup>51</sup>. The Spring 2007 European Council concluded that the idea of reform is widely embraced and member states are determined to fully implement the work programme, in particular by modernising higher education.<sup>52</sup>

Two of the core indicators used to monitor progress on the E&T 2010 work programme are HE specific: higher education graduates and cross-national mobility of students in higher education.

At the same time, the intergovernmental Bologna Process focuses specifically on Higher Education and aims to create a European Higher Education Area by 2010, in which students can choose from a wide and transparent range of high quality courses and benefit from smooth recognition procedures.<sup>53</sup> The Bologna Declaration of June 1999 put in motion a series of reforms needed to make European HE more compatible and comparable, more competitive and more attractive for Europeans and for students and scholars from other continents. The three key-priorities of the Bologna process are: introduction of the three cycle system (bachelor/master/doctorate); quality assurance; and, academic recognition of qualifications and periods of study.

There are numerous policy drivers for HE in the EU<sup>54</sup>. The role of HE in the Lisbon strategy goes beyond the programme of reforms initiated by the Bologna Declaration. While the Lisbon agenda plays an implicit rather than explicit role in the HE sector, the role of universities in the knowledge economy is coming under increased scrutiny as they are crucial to the achievement of many Lisbon priorities. The Commission is urging Member States to free up the substantial reservoir of knowledge, talent and energy in the EU through immediate, in-depth and coordinated change: from the ways in which higher

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<sup>50</sup>“Education and Training 2010” The success of the Lisbon strategy hinges on urgent reforms. Joint interim report of the Council and the Commission on the implementation of the detailed work programme on the follow-up of the objectives of education and training systems in Europe. March 2004

<sup>51</sup>Presidency conclusions, Lisbon 23-24 March 2000

<sup>52</sup>Presidency Conclusions – Brussels, 8-9 March 2007

<sup>53</sup> This concerns the academic recognition of qualifications. The recognition of qualifications with a view to exercise a regulated professions falls within the scope of Directive 2005/36/EC on the mutual recognition of professional qualifications adopted on 7.9.2005.

<sup>54</sup>For example, Berlin Communiqué (2003), Maastricht Communiqué (2004), Copenhagen Process (VET), Bergen Communiqué (2005).



education systems are regulated and managed, to the governance models for universities<sup>55</sup>

The Cluster on Modernisation of Higher Education has discussed the need for comprehensive reforms and concluded that in order to successfully reform higher education systems, a comprehensive approach is needed including: curriculum, internal and external governance and funding. Institutional autonomy should be increased and accompanied by robust governance arrangements with skilled leaders. Employers and students should be actively involved in reform processes and it is especially important to accept student experience of HE as central to reform success. The Cluster has also stressed that while funding incentives are an important instrument they should not stand alone. (See also section 7.2.2. (iii) and (ix)).

#### *5.1.1 Progress*

Particular progress has been made in certain areas such as strengthening the knowledge triangle of education, research and innovation and widening participation. On certain key issues, however, the 2007 reports often contain no higher education specific information, and refer the reader to schools or VET sections. This is particularly the case for gender issues where the provided information is oriented towards schools or VET (**BG, CY, CZ, FI, HR, HU, LT, PL, RO, UK**), learning outcomes based approaches (**CZ, EL, SK**), and learning partnerships (**CY, FI, NL, NO, RO, SE**).

The countries where HE is receiving high policy priority tend to be northern and Scandinavian. This is evidenced by high levels of funding for higher education institutions or increasingly strong links between industry and academia thus exemplifying the move towards increased public-private partnerships with businesses. But also in many other countries good progress has been made (e.g **CZ, EE, RO**).

## **5.2. Governance and leadership**

The Communication from the Commission to the Council and the European Parliament “Delivering on the Modernisation Agenda for Universities: Education, Research and Innovation” underlines that universities will not become innovative and responsive to change unless they are given real autonomy and accountability. In return for being freed from over-regulation, higher education institutions should accept full institutional accountability to society at large for their results. This requires new internal governance systems based on strategic priorities and on professional management of human resources, investment and administrative procedures, and efforts to overcome fragmentation.

The majority of countries have made good progress in this area. Rather than withdrawing from their responsibility for HE, many governments are in search of new modes of governance, for example through performance-based funding and steering.

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<sup>55</sup>Communication “Delivering on the Modernisation Agenda for Universities: Education, Research and Innovation”, COM(2006) 208 final

The autonomy of higher education institutions has progressed in many countries and higher education institutions now have in particular greater financial autonomy, as for example in **Croatia** but also in **Germany**, where lump sum budgets, combined with performance related funding have become widespread. There also continues to be an increased focus on performance related funding. In the **Czech Republic** there is now a greater emphasis on the results of activities and the effective targeting of resources. This coupled with greater higher education institution autonomy, has brought an increased emphasis on accountability in a number of countries (**CY**, **NL**). In many countries national law determines internal governance structures.

Many countries have simplified and rationalised their higher education institutions higher education institutions by regrouping them in order to raise standards and improve efficiency. This has involved bringing state and private higher education institutions together, for example in **Norway** where they have now been integrated in a common regulatory framework following a 2005 Act. Integrating higher education institutions in **Hungary** is yet another case in point.

An increasing range of stakeholders now has influence on national HE policies. Ministries of education, leaders at an institutional level, the EU, industry and business, and national agencies/bodies are all reported to have increased influence in this area. In particular policies have now been introduced to ensure and strengthen student representation on higher education institution boards (e.g. **HR**, **IS**) and representation from other stakeholders is also growing, as in **Germany**, through the introduction of university boards that can include representatives from business, arts, culture and science. In **Croatia** all higher education institutions are now obliged to have a student ombudsman. Student representatives have suspension veto power (only in the first vote) on decisions regarding their special interests (e.g. study programmes QA system and student welfare).

Commitments have been made in several countries, and new acts are coming into force for new methods of governance. Some draft laws which will impact on governance and leadership and help provide a legislative basis for higher education institution autonomy, are still under public debate, for example in **Romania**.

Some new systems of recruitment have been set up, for example in **Spain** a new system of recruitment of university rectors has been introduced. In some countries new governance arrangements have given rise to concerns over how academic staff is recruited. Thus there have been discussions in **Slovenia** about how deans will be recruited and there is concern over governmental influence on the academic sphere. The 2006 progress report noted that no activities or policies are referred to in relation to leadership training that would allow university managers to plan and manage change in a strategic way. Also the 2007 national reports don't mention any activity in this area. The need of developing managerial skills and competencies for the people involved was concluded by the European Council, underlining the crucial role of universities and their

research staff in the dissemination and transfer of research results to the business community<sup>56</sup>.

Some countries made no mention of governance and leadership issues in higher education in their national reports (**LI, MT, SK**)

### 5.3. Private investment

The increase in investment in human resources sought by the Lisbon European Council requires investment from both the public and the private sector. The 2006 report on E&T 2010 noted that the EU continues to suffer from under-investment from the private sector, particularly in higher education, and that greater private sector contributions to higher education should be encouraged through incentive measures with clearly defined roles and responsibilities between the various actors. Following this the European Council called upon member states to facilitate, in line with national practices, universities' access to complementary sources of funding, including private ones<sup>57</sup>.

Only a few countries have a strong tradition of private sponsorship of higher education institutions, but others are making progress in this area, both through national and local instruments and initiatives to stimulate private investment. In particular, significant progress in this area was reported in **Finland** and **Luxembourg**. The new Higher Education law in **Cyprus** now allows the establishing of private universities.

Several countries have introduced or refined government instruments to motivate investment from the private sector. These include a range of tax incentives (**ES, HR, SI, TR**) for investments in education and R&D and donations to universities.

Further tax reforms to stimulate research funding from the private sector are also being investigated (**SE**) or prepared (**SK**) in other countries. Other government initiatives of note include public-private partnership schemes (for HEI construction and renovation), the Innovation Fund (which is largely funded by businesses) in **Hungary** and pilot projects to support increased total private sector contributions to HE in the **UK**.

The private sector sponsorship of academic posts has increased in a number of countries (**FR, IE, LU**). In **Austria** professorial chairs may also now receive private sponsorship, while several enterprises in **Ireland** have established funds to support higher education institutions and scholarship funds have been established in **Latvia** involving private business funds.

Many countries have introduced tuition fees for university students in the last few years (**AT, DE, PT, SI, UK** (England, Wales and Northern Ireland)). Five universities in the **Netherlands** have been granted authority to charge higher fees for particular programmes. Currently the **Hungarian** Government directly encourages fee-paying education by setting an external income target alongside HE budgets and through maintaining the number of state-financed students below demand.

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<sup>56</sup> Presidency Conclusions, 23-24 March 2006

<sup>57</sup> Presidency Conclusions, 23-24 March 2006

There are a number of issues related to tuition fees. Past introductions or increases have led to strong debate. On the other hand in the **UK** there have been complaints from some higher education institutions regarding the capping of fees (at £3,000), and there is also concern that some higher education institutions are looking increasingly to overseas students (who pay full costs if non-EU) to bolster their finances. There are also considerable differences between parts of the **UK**, with Welsh students studying in Wales having 60% of their tuition fees paid by the Welsh Assembly Government through a grant, while students in England have to find the full cost of the fees (although these are not repaid until after graduation). In Scotland, however, all EU students have tuition fees paid for them by the Scottish Executive. In **Hungary**, higher education institutions increasingly endeavour to find ways to set and collect substantial tuition fees and the Government is now trying to restrict possibilities in this area through legislation.

There is debate in **Ireland** over the introduction of fees at state-run higher education institutions, while in **Sweden** a commission recently investigated the possibility of introducing university fees for students coming from countries outside the EU/EEA. The tuition fee system in **Croatia** is also currently being reviewed.

The relative importance of private funding in HE varies and also how it is composed. Private investment in HE is still particularly low in some countries (such as **BG** and **CZ**) with a lack of successful instruments in this area. Other national reports contained limited or no information on recent progress in encouraging private investment (**BG, DE, EL, LI, LT, RO, SI**).

#### **5.4. Widening access and improving equity of participation, treatment and outcomes**

Activity has been common since the last report in this area with many countries introducing specific measures to facilitate entry to HE from underrepresented groups such as those who experience socio-economic disadvantage, those with disability and adult students. The main mechanism for facilitating access focuses on financial support for entry and participation, for example scholarships and fee waiving. In some instances countries are using the the EU Cohesion Policy programmes to assist with widening access. As for example in **Ireland** where the National Office of Equity of Access to Higher Education was established with ESF support and has developed and is monitoring the implementation of a 2005–2007 action plan to improve access and educational opportunity for underrepresented groups.

Two countries have mentioned targets (**NL, SE**) for the access and outcomes of underrepresented groups. The government in the **Netherlands** has set aside additional funds for improving the participation and outcomes for ethnic minority students and has drawn up performance agreements with 21 higher education institutions.

Measures to facilitate greater participation levels of those with disabilities have been introduced in many countries (**ES, HR, LI, PL, PT, TR**). In some cases this involves financial support (**HR, PL**). In **Lithuania** the "Procedure of Rendering Means of Financial Aid to the Disabled Students of Higher Education Institutions" has been in

progress, where a monthly targeted allowance, an equivalent of 50 percent of a basic state social security pension, has been assigned to students with special needs.

At the same time access and infrastructure for those with disabilities is identified as a focus in several countries. This relates to increased participation as well as improving the equity of treatment and outcomes. The use of on-line learning mechanisms and ICT, to enhance access is particularly strong in **Slovakia** for example. The provision of support services within HEI for students with disabilities has been a feature of progress in two countries (**CY** and **SK**). The **Czech Republic** supports the access and improvement of conditions for the students with disabilities during their studies from the resources for development programmes (in the amount of around 1.4 mil € in 2006). In **Estonia** the provision of a personal support system for people with disabilities has been praised by disability organisations.

Certain other disadvantaged or underrepresented groups have received support, for example, Roma students in **Croatia** and those coming from families with many children (**BG**, **EL**). The Baltic States have introduced measures for particular groups. In **Estonia**, for example, with a large Russian-speaking minority, the state covers the cost of one year of advanced **Estonian** language courses for university students experiencing difficulties in progressing because of language barriers. In addition about 10% of **Estonian** HE curricula are in Russian<sup>58</sup>. In **Lithuania** laws have been amended to help and encourage the children of emigrants to return to the country for HE. In **Sweden**, financial student aid has been reinforced for certain groups, for example, those caring for children. The opportunity for older people to apply for financial aid has also been increased.

There are few specific references to financial support or other methods explicitly designed to encourage the participation of older people or those from low-income backgrounds. An Act is in the process of adoption in **Slovenia** which will involve an increase in the number of state scholarships. The entry criteria for obtaining scholarships will be eased for example by increasing the supplement for low income families. The **UK** also has good networks and partnerships through the 'Aimhigher' programme which promotes and provides information on funding possibilities to young people and their parents where HE participation has been low, for example those from lower income backgrounds.

Methods of flexible learning have continued to be introduced. More higher education institutions now offer evening courses and distance learning opportunities have also been increased for example in **Lithuania**. In **Estonia** study material is now freely accessible on-line. One national agency in **Sweden** is now tasked with supporting and coordinating the development of IT mediated distance learning. Open University models continue to operate in several countries, for example **Cyprus**.

There is evidence of the increasing merging of vocational and academic spheres making HE more accessible to those who have previously followed a vocational path. This is also

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<sup>58</sup> The text from the national report identified that curricula were in Russian. It is not clear whether this means the teaching and / or the associated learning materials are in Russian

a transversal issue regarding the assessment, and validation of non-formal and informal learning. As highlighted in section 3.2. higher education institutions in many countries have autonomy to validate prior learning and thus increase non-traditional entry requirements. In **Denmark** for example admission from VET to short and medium cycle HE is to be strengthened. Some focus on prior learning and non-traditional entry routes is also taking place, for example in **Norway** where applicants can be admitted to HE without sufficient formal qualifications on the basis of age and a combination of formal, non-formal and informal learning. In **Greece** students coming from the new structures of secondary vocational education, the Vocational Lyceums (EPAL), are now enjoying equal opportunities with respect to entry to higher university education.

Little has been reported on possible institutional barriers to access such as student fees. In England where these have been introduced, although enrolments did fall in the first year (2006 entry), applications for entry in 2007 are consistent with long term growth trends. Policies are also in place that mitigates the effect of fees on those with a low income for example; full time undergraduate students are able to defer fee payment through a loan with a non commercial interest rate linked to the inflation rate. Loans are only repaid when income exceeds a threshold level. In **Lithuania** there are plans to introduce relatively high tuition fees which academic staff and student organisations are opposing on the grounds that it will reduce access to higher education.

Many reports focus mainly on progress in relation to raising the proportion of women in HE and in certain subject areas. These are dealt with under the section on gender. Some countries did not report on progress this specific issue (**BE nl, FR, HU, IE, LI, LU**)

## 5.5. Gender Issues

A distinction can be made between those countries which have reiterated the provision of broad policies such as equal opportunities frameworks, and those that have attached more priority to gender issues in HE, introduced new legislation and established, monitored and reported gender targets. Measures have also been introduced at the school level, as this is where crucial decisions on HE are made. There has been good progress in the proportion of female students entering HE. Several countries (**FI, CY, EL, HU**) specifically report higher proportions of women than men entering HE. In **Hungary** for example in 2004/2005 there were 54% women as opposed to 46% men enrolled in HE.

There has been an increasing focus on improving gender balance on a subject-by-subject basis, which is still a significant issue in many countries (**HU, LU, MT, NL, SK**). Both the **Netherlands** and **Slovakia** have used the EU Cohesion Policy programmes to tackle this issue in the following ways. In **Slovakia** funding from EQUAL (2004-2006) has enabled investigation of gender issues in HE in order to monitor the situation and make recommendations for change. With assistance from the EU Cohesion Policy programmes **Italy** has also developed an evaluation framework to examine the impact of equal opportunities strategies. In the **Netherlands** a project has been running since 2005 which intends to promote the choice of science and technology for females through additional guidance counselling and contact with role models. In **Latvia** in 2006 the Ministry of Education and Science participated in a 6th Framework Programme which is researching women's status in different areas of science and as well as the reasons for potential

discrimination and inequality. These projects aim to fulfil the European Council objective of reducing the imbalance between men and women in this domain. In **Germany** various initiatives have been taken to remove obstacles that might prevent women from embarking higher education studies.

Some countries, particularly in northern Europe, have made good progress in increasing female participation rates in all subjects (e.g. **AT**, **DK**, **IS**). Some countries where there is gender inequality in subject areas have done little to rectify the problem (e.g. **MT**).

No specific measures have been introduced to increase male participation rates (both in HE as a whole and in particular non-traditional areas). Concerns about a lack of measures to encourage males to enter non-traditional areas were noted in **Slovenia**. In all subject areas in **Iceland** the gap has been closing or female students already outnumber men. For example more than 80% of students in medicine and health care are female as are 45% of students in mathematics and natural sciences.

**Sweden** offers good practice in the area of gender balance, as there is a requirement to report yearly on gender issues, on how higher education institutions are working with gender equality, and measures are taken to bring about a more even gender distribution in different subjects. Monitoring systems are also being introduced elsewhere. **Spain**, for example, is planning to use gender balance indicators.

There is a widespread under-representation of women in senior academic positions in Europe. Several countries mentioned this issue in their 2007 national reports (**NL**, **NO**, **SI**). Some countries have introduced measures to counter this. In Luxembourg researchers with young children can ask to have their teaching tasks alleviated, maintaining their original pay. In **Norway**, measures will be introduced as a result of recommendations from a Committee for Women in Science. This committee will remain in place until 2010. **Austria** introduced a new measure in 2005 which aims to double the proportion of women professors by 2010 by giving universities a financial premium when they appoint women to chairs.

## **5.6. Learning outcomes based approaches**

Learning outcomes are a statement of what a learner is expected to know, understand, and or be able to do at the end of a period of learning. There appears to be confusion however about the meaning of learning outcomes based approaches, and, while countries are stating that they are introducing such approaches into the curricula, there is little evidence as to what this means in practice and what types of competences are being recorded.

For many countries adopting learning outcomes based approaches is ‘work in progress’ following the introduction of the Qualifications Framework for the European Higher Education Area and the development of the EQF. Many countries are now recognising the need to make academic qualifications more relevant to national and local labour markets (e.g. **FR**). In **Romania** activity is planned on the basis of research carried out in 2005 to develop a model for competence based curriculum development. Involving

industry representatives in formulating learning outcomes has occurred, or is planned, in some countries (**BG, LU, SE, TR**).

Extensive curriculum reforms have taken place in some countries. In **Denmark** for example the HE qualifications framework which has now been functioning since 2003, has been used for curriculum reforms at the universities. In vocationally oriented HE projects on the application of the qualifications framework have been implemented. At present the qualifications framework is undergoing revision and a new version is expected to be adopted in autumn 2007. **Estonia**, with the help of the EU Cohesion Policy Programmes, has been running a 3-year inter-university programme which includes the development of study programmes and the recognition of previously acquired knowledge. This is one of the few times where mechanisms, such as the recognition of prior learning or knowledge, are mentioned.

Descriptions of HE qualifications in terms of learning outcomes have now been put in place in several countries (e.g. **DE, FR, HU, IS, SE, UK**). In **Slovenia** HE study programmes must now be internationally comparable and contain general and subject specific competences. In **Slovenia**, an identified weakness is that university professors are trying to adapt the old programmes to the new framework, but that in many instances this is being done in too mechanistic a way. **Poland** is making progress in this area. A new regulation on degree programme requirements (national standards) has been drafted and is currently going through the legislative process. Requirements provide a foundation for the development of curricula based on learning outcomes.

The following countries did not report on progress on learning outcomes based approaches from (**CY, FI, LI, LU, MT, PT**)

### 5.7. Quality assurance

Most countries have extended existing quality assurance and accreditation systems or established new systems or agencies, focussing on a mixture of course, discipline, department and institutional accreditation and evaluation<sup>59</sup>.

Some countries have achieved a significant level of progress with regard to QA systems (**FI, FR, LU, SE**). **Sweden** for example has a strong and well working system for the continuous evaluation (over a six year cycle) of programmes and disciplines at the university level, with a new QA system being introduced for 2007-12, while in **Finland** the national QA system is regarded as comprehensive and well-developed, with the Higher Education Evaluation Council taking national responsibility for the external evaluation of higher education institutions. **Luxembourg** has a good QA system, with guidelines for external evaluation elaborated by the ministry, while the creation of the new Agency of Evaluation of Research and Higher Education in **France** is a major change in the governance and leadership issue within this country.

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<sup>59</sup> For a comprehensive picture of the quality assurance situation in higher education around Europe see Eurydice Focus 2007.



In many countries, higher education institutions are obliged to set up their own internal quality assurance procedures, with some being monitored or audited by external bodies (e.g. **AT, BG, CZ, DE, EL, ES, FI, HR, HU, IE, IS, LU, NO, PT, TR**). Recently for example, **Bulgaria** has seen the development of internal QA systems at institutional level in all accredited higher education institutions, while in **Croatia**, the National Council recently adopted a manual for QA systems at higher education institutions, which is being used by the QA units that are being established at individual institutes. Since 2005, all higher education institutions offering accredited education in **Norway** have been obliged to have an internal QA system. In **Austria** clear goals are set for the development of an internal QA system in the performance agreements between universities and the ministry for the first period from 2007-2009. Programmes in University of Applied Sciences (Fachhochschule) sector and private universities are accredited.

Under **Finnish** law, all HEI must conduct their own QA by evaluating their education and research and its impact, and in **Iceland**, greater emphasis has been put on QA over recent years through new laws on the monitoring of the internal quality systems set up by HEI. Other countries have seen developments in their systems of internal quality assurance (**CZ, LU, LV**) and recent **Spanish** regulations will lead to higher education institutions introducing QA systems.

External agencies and bodies responsible for accreditation and evaluation have also been set up or developed in a number of countries. Recent developments of particular note include a joint Dutch-Flemish accreditation agency to monitor quality and accredit higher education institutions (**BE nl, NL**), the legislative regulation of QA by the National Evaluation and Accreditation Agency of **Bulgaria**, and the establishment of the new Agency of Evaluation of Research and HE in **France** or the recent creation of the Agency of Evaluation and Accreditation for Quality Assurance in HE in **Portugal**. There are plans to establish a single QA and Accreditation board in **Cyprus** for the external evaluation of all tertiary institutions (state, private and foreign). In **Italy** the government has approved the creation of a national agency for evaluating universities and research (Anvur). This body will be responsible for promoting quality in universities and research through the collection and analysis of data, accreditation and evaluation of courses and lifelong learning activities.

Frequent reference is made in the 2007 national reports to the European Standards and Guidelines on Quality Assurance, which were adopted by Ministers at the Bergen Conference in 2005. Many also emphasise that evaluation and accreditation criteria have been developed to reflect the Standards and Guidelines for QA in the European HE Area (e.g. **BE nl, BG, CZ, DK, HR, IE, IS, NL, NO, PT**).

## **5.8. Learning partnerships**

The focus of many learning partnerships has been on facilitating links between higher education institutions and businesses. The purposes of these links are to enable businesses to contribute to course and qualification development, and to encourage knowledge transfer, for example, through student placements, and joint research projects.

Stakeholders tend to represent those external to the academic sphere, and in some cases have direct influence on pedagogical issues such as the development of curricula. In **Cyprus** for example, the Pedagogical Institute has made efforts to involve a wider range of stakeholders in its projects. An example is the recent programme/debate on online communities, in which several representatives of civil society were invited to participate.

The main involvement of stakeholders is at the higher education institutions level and often takes the form of participation in councils. Thus in **Belgium nl** there is a representative body of all stakeholders, and for instance in **Poland** and **Germany** public higher education institutions may have a council including a wide range of representatives.

In **Estonia** the development plan for education 2007-2013 was prepared with a range of stakeholders, and some countries have engaged stakeholders around issues of quality assurance (e.g. **Romania**). In **Slovakia** there has been engagement with businesses and “subjects of social practice” in the development of study programmes. The **Malta** College of Arts Science and Technology has a partnership with local industrial, commercial and servicing enterprises to ensure that societal changing needs are serviced with relevant programmes.

The Cluster on Modernisation of Higher Education has made recommendations on university-business partnerships which it finds should not be separated from teaching and research activities. The three should be complementary. A powerful tool for establishing solid partnerships is engaging the business sector in HE activities (such as internal governance). Partnerships should be visible to society at large. (See also section 7.2.2. (iii) and (ix)).

There are however barriers to forming partnerships. Often SME's, because of their small size, have little capacity to collaborate. In **Slovenia** it seems that neither companies nor higher education institutions are keen on collaboration and little has been achieved in this area.

Information on learning partnerships provided in the national reports is patchy and some countries did not report on the issue (**BE fr**, **DK**, **FR**, **LI**).

## **5.9. Knowledge triangle**

The knowledge triangle refers to the interaction between education, research and innovation, which are key drivers of a knowledge-based society. In this context it refers to an attempt to better link these key concepts, with research and innovation already highlighted by the development of the Lisbon Strategy. Universities and their research staff play a crucial role in the dissemination and transfer of research results to the business community. A need to develop managerial skills and competencies for the people involved is therefore generated and is beginning to inform new approaches to managing the knowledge triangle.<sup>60</sup>

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<sup>60</sup>Presidency Conclusions, Lisbon, 23-24 March, 2006

Universities remain the key players in research for example in **Belgium nl**, **Greece** and **Turkey**. In certain countries a large proportion of the public research budget still goes to universities.

Countries have made a number of commitments in this area. **Estonia** has produced a strategy for 2007-2013 which aims to increase the number of researchers and engineers, link student research areas to the needs of enterprise, and improve mobility between academia and enterprises. In 2006 **Ireland** adopted a Strategy for Science, Technology and Innovation (SSTI) with additional resources, focussing on research and development in the higher education institutions and in the Enterprise sector. This integrated approach is intended to ensure ambitious and coordinated actions aiming at national key targets. Also **Cyprus** has defined a national strategy to establish the country as a regional education center and reinforce the knowledge triangle.

Other countries now require higher education institutions to draw up R&D strategies (**HU**). In **Italy** there are regional plans which aim to promote the development of wider networks which link schools, universities, research and employers. Specific actions will include increasing staff competences, needs analysis and sharing of teaching materials. The EU Cohesion Policy programmes have been used to develop the knowledge triangle in some countries (e.g. **CZ**, **HU**, **LT**, **SI**). In **Hungary** for example in order to boost innovation within higher education institutions, the university-based Regional Knowledge Development Programme was launched in 2004 with support provided by the EU Cohesion Policy programmes. In **Slovenia** in the period 2004-2006 considerable funds were allocated from the ERDF and the PHARE programme for reinforcing the knowledge triangle. This funding went to support technological centres, networks and parks, business clusters, research centres of excellence, and university spin-off incubators. Financing of such activities will continue in the period 2007-2013, and greater support will be given to ensuring the operation of patent offices and university offices for technology transfer. Internationalisation and mobility of researchers, and therefore knowledge, is a central priority for some countries. In **Estonia** for example researchers are encouraged to participate in a European network of research facilities. It is also an aim in **Finland** to internationalise education, research and innovation. **Finland** has also made progress in institutional mobility and cooperation.

Measures to encourage levels of entrepreneurship have proliferated in some countries. The Learning Entrepreneurship Partnership in the **Netherlands** encourages entrepreneurial skills in education. In 2007 Centres for Entrepreneurship were established at universities in the **Netherlands**. Measures to promote entrepreneurship are also strong in **Sweden**. The Agency for Industrial and Technical Development (Nutek) is implementing a national programme to promote entrepreneurship in compulsory and upper secondary schooling, and also in HE.

Encouraging higher education institutions and industry collaboration is strong in the Nordic countries. Public and private sector cooperation is planned in **Finland** through the Strategic Centres of Excellence in science technology and innovation. In **Iceland** a forum is planned for cooperation between higher education institutions, spin-offs and research intensive SME, innovative companies and public research institutions. Good cooperation

between enterprises and research groups also takes place through the Centres for Research based Innovation (HRIs) in **Germany**, **Norway** and the **UK** encourage higher education institutions to exploit their research activities through for example, spin off businesses. In the **Czech Republic** public universities are supported via development programmes to motivate them to cooperate with the region and the private sector and to interconnect theory and practice.

With regard to SMEs the RAAK scheme in the **Netherlands**<sup>61</sup> provides funding for cooperation between higher education institutions, SME and social sectors. Some countries are still struggling in this regard however. In **Greece** the private sector has little involvement in R&D. There are weak links between the public and private sectors, and a reliance on traditional products and the limited access to finance for business growth and start-up compounds the situation.

Research is to some degree becoming increasingly relevant to private industry. For example in **Slovenia** and **Spain** researchers (in universities) can now conduct research for the business sector. The research is carried out within the university but is connected to the needs of businesses.

Commercialisation of research and the encouragement of business activities within higher education institutions have also occurred in several countries (**FI**, **IS**, **HR**, **HU**, **SE**, **UK**). In **Finland** a legislative amendment now gives universities the right to establish enterprises. In **Hungary** higher education institutions are now able to conduct business activities and in **Sweden** there are moves to make it easier for researchers to commercialise research findings. In Scotland the Scottish Knowledge Transfer Grant (KTG) provides higher education institutions with funding for knowledge transfer activities, including the commercialisation of research. Generation of an awareness of the potential commercial exploitation of academic projects, and making scientists aware of exploiting their intellectual assets has taken place in several countries (e.g. **HR**, **IS**).

In the interest of greater transparency, the allocation of resources to encourage and facilitate research to higher education institutions and other organisations has come under scrutiny. In **Hungary**, for example, this is the role of the newly reorganised research and innovation council.

There is evidence of activity around human resources and researcher careers. This includes increased funding for researcher positions for example in **Belgium (nl)**, the training of academic staff in commercial skills in **Croatia** and making it easier for PhD graduates to secure employment within industry in **France**. Attracting more individuals into research careers is a component of an effective knowledge economy. Only **Lithuania** however has reported this as an issue.

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<sup>61</sup> "Regional Attention and Action for Knowledge Circulation"

### 5.10. Participation targets and associated measures

Several 2007 national reports indicate that participation targets have been set for the number or proportion of the population in HE and / or with a HE degree (**BE nl, CZ, FI, HR**).

The **Czech Republic** has increased university student numbers by 9.8% since 2005/6, exceeding projected increases in the Ministry's Long Term Plan. Participation rates have increased each year in **Lithuania** and **Poland**, while in the **UK** (England and Scotland) good progress has been made towards the target of a participation rate of 50% of 18-30 year olds (18-21 in Scotland) having experienced HE by 2010. In Wales, the target is to increase the proportion of young people from low participation neighbourhoods from around 25-30% to 40-50% by 2010. The **Netherlands** has almost achieved the target of 50% participation in HE. **Sweden** has recently withdrawn the target of 50 percent of 25 year olds to have started higher education.

**Lithuania** has achieved progress in this area and high participation levels that are increasing year after year. The country's 2003-12 strategy set out the aim to increase the proportion of 30-34 year olds who are graduates from 38% in 2005 to 50% by 2007 and then 60% by 2012.

General expansion effectively ended in 2004 in **Hungary**, partly as a result of the declining college/university age population. There are however still moves to increase the number of students obtaining vocational qualifications in the fields of maths, natural sciences and technology. Similarly, **Slovenia** does not envisage specific measures for increasing participation due to persistent growth in HE but greater importance is being given to guiding young people into study programmes in science, technical subjects and healthcare.

For a few countries, other measures and targets have been introduced. In **Croatia**, for example, a number of higher education institutions have been developed in smaller urban areas to help achieve targets. In **France**, doctoral studies were reformed in 2006 to offer students a better recognition of their diploma within academia and industry, which may encourage increased rates of participation in HE, while in **Latvia** the size of the available student load has been doubled.

Some issues were identified in relation to participation targets for some countries. Given the fragmentation of the system in **Cyprus** and the high number of those studying abroad, it is more difficult to set quantitative targets. Issues were also raised around decreased quality as a result of increases in quantity in **Lithuania** and the **Netherlands**.

Many countries did not report on targets or the status was unclear (**AT, BG, CY, EE, IS, LI, LV, NO, PT, TR**).

#### *5.10.1 Measures to increase excellence*

For most countries the focus has been on improving excellence in research. This is being pursued either through creating specific centres for the fostering of innovative research

and development (**EE, EL, FI, NO, UK**), or through measures to encourage research excellence in human capital (**EE, ES, FR, HU, LU, MT**). Teaching issues are not addressed as frequently<sup>62</sup>.

The Nordic and Baltic countries have made progress in setting up particular centres of excellence. **Estonia** has used national and EU Structural Funds resources for the development of Centres of Excellence in areas of research, development and innovation. In **Finland**, there are separate Centres of Excellence in the field of education and research. The criteria for selecting centres of excellence include the links between education and research and society, strategic management, and institutional collaboration. **Norway's** Centres of Excellence scheme which aims to bring more Norwegian researchers and research groups up to a high international standard has been successful. The evaluation committee found that all 13 Centres of Excellence had had a positive impact on the research communities where they had been established. They had spawned cooperation and interaction between different research fields and across departments and faculties. In **Germany** the federal and Länder governments have launched an initiative for excellence that provides an extra 1.9 billion € between 2006 and 2011 to boost top level research at selected universities.

Several initiatives have been introduced to develop researchers. **Estonia** is expanding the scope of doctoral studies. Measures will be taken to promote the careers of top researchers, and permanent positions will be established for excellent researchers and top-level university teachers. **Hungary** also aims to improve the status and quality of academic researchers for example through scholarships to support those with PhDs based on outstanding achievements at international standards. In **Luxembourg** and the **Netherlands** there is a focus on gifted students.

In the **UK** the government has recognised the need to encourage and reward excellence in HE and bolstered this with programmes such as the creation of centres for excellence (in England). The Centres for Excellence in Teaching and Learning (CETL) initiative has two main aims: to reward excellent teaching practice, and to further invest in that practice so that the CETL funding delivers substantial benefits to students, teachers and institutions.

Evaluation of performance has been seen as an important component in increasing excellence. Externally evaluating study programmes, linking budgets to performance, and establishing reviews of quality assurance procedures are either taking place or being planned (**IE, IS, LT**). Linking resources to quality is a key theme in **Sweden** where the Government has stated in its budget bill for 2007 that it will give priority to quality as well as quantity.

A few countries have set up systems which allow them to benchmark their performance. The **Czech Republic** is trying to benchmark its activities internationally through the OECD Thematic Review of Tertiary Education in 2005/2006. This is an important basis

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<sup>62</sup> Teaching is mentioned by some countries – by the **UK** for example, and their Centres of Excellence in Teaching and Learning.

for the White Paper that is being prepared on this issue. The Centre for Teaching and Learning in **Cyprus** aims to support and develop teaching and learning, so that these may be internationally compatible and have competitive quality Criteria. **Slovenia** has also set targets based on comparative performance of their higher education institutions.

#### **5.11. Measures to increase the number of maths, science and technology graduates**

The European Council has set two relevant objectives:

- To bring about a 15% increase in the number of students in science and technology fields by 2010
- To reduce the imbalance between men and women

Most countries have undertaken efforts to increase the number of MST graduates. For example, with a newly established Technological University (**CY**), a pilot programme to support talented young people interested in studying an MST discipline (**CZ**), efforts to popularise MST (**EE**, **MT**), the establishment of an **IT** Investment Fund (**IE**) and funding of specific projects (**IT**, **UK** - England). In **Iceland** there has been progress in better identifying the challenges faced within this area, though the implementation of a response has so far been limited. Several countries have undertaken no additional measures in this area since the 2005 national reports (e.g. **BE nl**, **BG**, **EL**, **ES**, **HR**, **NO**).

Some challenges have however been identified. Despite **Finland's** above average participation in MST, the proportion of female students and graduates in these fields is below the EU average. The **Czech Republic** national report explains that little selection for entry combined with the difficulty of courses contribute to fairly high failure rates, but expects the introduction of the two cycle system to bring about improvement. In **Lithuania** and **Slovenia**, the challenge is to ensure adequate employment opportunities for graduates. In the **UK**, there is some concern that some higher education institutions are closing MST departments. This may be due to a lack of student demand, but possibly also to the high running costs of courses, combined with cuts in funding and capped tuition fees (full-time undergraduates in England are liable to pay tuition fees of up to a maximum of €4,429 a year).

A few countries have specified future measures to increase participation in MST. For example, **Bulgaria** has set out concrete activities in the draft of its National Reforms Programme, while in **Denmark** a national strategy is being devised to better coordinate the various initiatives that have been launched in this area. **Latvia** intends to increase the number of state budget funded study places in natural sciences, engineering, medicine and environmental sciences.

The following countries did not report on this issue (**BE nl**, **PL**, **RO**)

## 5.12. Summary

*Governance and leadership.* Progress is being made in devolving responsibility to higher education institutions through increased autonomy and accountability. Mechanisms, which are being put in place to foster this development, are being steered nationally via regulatory frameworks and performance based funding. With reference to training university managers to plan and manage change in a strategic manner, however, no country indicated any progress in relation to the last report.

*Private investment.* Instruments to stimulate private investment such as tax incentives and reforms, public private partnership schemes and private sponsorship have been introduced to stimulate investment. Tuition fees have been introduced in a number of countries. Although there is some opposition to such developments, further countries are considering introducing such approaches.

*Widening access, and improving equity of participation, treatment and outcomes.* Since 2005 many countries have introduced measures to facilitate entry to higher education among under-represented groups. Measures to encourage participation include: financial support, partly specifically targeted to boost participation among underrepresented strata of society; flexible learning, including evening and distance learning opportunities; measures to recognise prior learning and experience; and in many countries, specific support structures and systems for people with disabilities. Additionally a merging process between the higher education and vocational spheres can be detected. Only two countries have identified targets for access and outcomes among under-represented groups and few data are given in (financial) support or existing barriers for potential students coming from such groups.

*Gender issues.* Good progress is being made concerning the numbers of female students entering HE. In several countries women HE students outnumber men. Progress concerning gender issues is attributed to equal opportunities legislation, monitoring and reporting on gender targets and activities in school such as measures to increase female participation in MST. Widespread concern about the representation of women in senior academic positions was reported with measures to address these concerns identified in some national reports.

*Learning outcomes based approaches.* Some national reports indicated that learning outcomes based approaches are being introduced. However, little information has been provided on what this means in practice. An increased involvement of stakeholders from industry in the formulation of learning outcomes can be identified in a number of countries. However, more work needs to be done as curricula reform, the introduction of qualification frameworks and the recognition of the importance of tailoring qualifications towards labour market needs, necessitate an invigorated development of learning outcomes based approaches.

*Quality assurance.* Measures relating to quality assurance, either those continuing to develop existing systems or introducing new systems and accountability agencies, featured in most national reports with a significant progress to be seen in some countries.



There are isolated cases where there is resistance to the introduction of quality assurance among the staff of higher education institutions.

*Learning partnerships.* Two key types of partnerships were mentioned: higher education institutions business partnerships and higher education institutions governing councils, where stakeholders play a role in institutional level governance. Despite information being patchy it is clear that progress towards forming partnerships is hampered by various factors.

*Knowledge triangle.* Countries have made and are continuing to make commitments to improve the linkages between HE, enterprises and innovation: in some countries there is a recognition that research is becoming more targeted to the needs of industry and commercially orientated. Strategies and plans have been introduced to improve R&D and the transfer of expertise between higher education institutions and enterprises. In addition, measures to improve entrepreneurship including agencies and partnerships with responsibility to promote entrepreneurial skills development are cited. Partnerships between HE and industry were mentioned as a priority in the 2006 progress report. Progress has been made as commercialisation of research and the encouragement of business activities within higher education institutions have occurred in several countries. The national reports further indicate that progress has been good in relation to the promotion of partnerships between HE and industry, but there is little evidence to suggest that this has been translated into many actual programmes and policies outside of Nordic countries and the UK.

*Participation targets.* Several national reports identified participation targets for the proportion of the population, or particular age groups, in HE or with a HE degree and detailed progress against these targets. However, the majority of countries made little or no reference to targets or measures in this area. The evidence also suggests that some countries are focusing on participation in MST rather than general participation targets.

*Measures to increase excellence.* Measures adopted to increase excellence are still mainly research-orientated and do rarely include teaching or other services provided by the HEI. Centres of excellence have been introduced with state and EU funding. Measures have been introduced to develop researchers' skills. Some countries have set up systems to benchmark their HE performance internationally. Increasingly evaluation of performance comes to be seen as an important component in fostering excellence.

*Measures to increase participation in maths, science and technology.* While most countries have either introduced or have set out future measures to increase MST graduates, several countries, have refrained from implementing any additional measures. Measures include: introducing new higher education institutions; expanding existing provision; and, financial incentives. Rigorous selection criteria, a decline in the number of MST departments and a lack of appropriate employment opportunities following completion of courses remain exemplary barriers to participation.

## 6. VOCATIONAL EDUCATION AND TRAINING AND ADULT LEARNING

This chapter analyses the countries' progress on the implementation of the E&T 2010 within the fields of VET and adult learning<sup>63</sup>. Adult learning is understood as: all forms of formal as well as non-formal and informal learning undertaken by adults after having left initial education and training, be it vocational or non-vocational learning<sup>64</sup>.

The Copenhagen Declaration from November 2002 introduced four priorities for enhanced European cooperation in VET across Europe: strengthening the European dimension in VET; improving transparency, information and guidance systems; recognising competences and qualifications<sup>65</sup>; and, promoting quality assurance<sup>66</sup>.

In the Maastricht Communiqué of December 2004<sup>67</sup>, the priorities were further specified, and agreed. At the follow-up meeting in Helsinki in December 2006<sup>68</sup> the process was evaluated and its strategies and priorities were reviewed. The follow-up of the Copenhagen process indicated that the enhanced cooperation in VET has proved successful and produced encouraging results. Progress was reported in key areas such as national qualification frameworks (NQF), developments of standards, redefining qualifications in terms of learning outcomes, validation of non-formal and informal learning, integrating learning with working, access and equity and guidance and counselling. As regards areas to improve, concern was expressed that - whilst the focus of ongoing work has been on issues concerning quality, transparency and mutual recognition - less attention has been paid to the image and attractiveness of the vocational route. The need for mutual learning across the EU and a more evidence-based training policy, including better use of statistical indicators and benchmarks was also expressed.

As emphasised in the Helsinki Communiqué, VET constitutes a major part of Lifelong Learning and is confronted by the twin challenge of engaging both young people and adults in working life. The Communiqué stressed that young people in VET should acquire skills and competences relevant to labour market requirements and drop-out rates should be reduced. In addition, the adult labour force's skills, competence and mobility should be promoted by improving training opportunities and better recognition of prior learning gained through training and work experience.

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<sup>63</sup>From the national reports it has not always been possible to distinguish between VET and adult learning. Also countries do not always operate with clear distinctions between adult learning and adult education.

<sup>64</sup> The 2006 Commission Communication on Adult Learning introduced this definition.

See [http://eur-lex.europa.eu/LexUriServ/site/en/com/2006/com2006\\_0614en01.pdf](http://eur-lex.europa.eu/LexUriServ/site/en/com/2006/com2006_0614en01.pdf)

<sup>65</sup> The recognition of qualifications with a view to exercise a regulated professions falls within the scope of Directive 2005/36/EC on the mutual recognition of professional qualifications adopted on 7.9.2005.

<sup>66</sup>Latest report on the progress "Zooming in on 2010"

[http://www.trainingvillage.gr/etv/Information\\_resources/Bookshop/publication\\_details.asp?pub\\_id=474](http://www.trainingvillage.gr/etv/Information_resources/Bookshop/publication_details.asp?pub_id=474)

<sup>67</sup> See also [http://ec.europa.eu/education/news/ip/docs/Maastricht\\_com\\_en.pdf](http://ec.europa.eu/education/news/ip/docs/Maastricht_com_en.pdf)

<sup>68</sup> See also [http://ec.europa.eu/education/policies/2010/docs/helsinkicom\\_en.pdf](http://ec.europa.eu/education/policies/2010/docs/helsinkicom_en.pdf)

This chapter analyses national policies and measures concerning initial VET, VET delivered by HE institutions, CVET (continuing VET) and other types of adult learning. As emphasised in the Communication on Adult Learning “It is never too late to learn”, the importance of adult learning is increasingly being acknowledged by the participating countries as a crucial part of ‘lifelong learning’. Adult participation, however, varies widely across the EU is still unsatisfactory in many participating countries (see also section 2.3.4.). In most countries, education and training systems are still largely focused on initial education and training.

The national reports only differentiate between initiatives concerning VET as opposed to adult learning to a limited extent. Some national reports have on some issues separate sections describing initiatives concerning adult education/adult learning, while other countries merge the issue with aspects, -or omit it.

## **6.1. Increasing quality and attractiveness**

### VET

The Helsinki Communiqué emphasised the need for more focus on attractiveness. The focus has been on issues concerning quality, transparency and mutual recognition, while less attention has been paid to the image and attractiveness of vocational pathways.

The national reports indicate that in many countries priority is being given to improving the image and attractiveness of vocational pathways for employers and individuals in order to increase participation in VET and adult learning. The measures to enhance the attractiveness of VET and adult learning cited in the national reports include:

- Flexible progression routes between systems. (Further details on pathways from VET to HE are given in section 6.4).
- More flexible approaches. Many countries are developing more flexible, modular and accumulative structures to facilitate the entry to initial VET as well as the return to the educational system. In **Italy** the Ministry of Education and Ministry of Labour have cooperated with the regions in order to facilitate the transfer of students between the systems of education and vocational training, both horizontally, between one area of education and another, and vertically, from one level to another in all areas of education.
- Improved guidance on the VET options for adults
- Validation of non-formal and informal learning (for further details see section 3.2).
- Improving quality. This is achieved through strengthening quality assurance procedures for education providers and apprenticeship training (e.g. **IE**, **LU**) or by encouraging quality through award competitions (**EE**) or performance-based funding (**FI**). (Further details are given in section 6.2)

Many countries use a combination of these measures. The development of more flexible and modular VET systems and the generally increasing managerial autonomy of VET institutions make it a key future challenge to ensure that initiatives at system level to enhance VET attractiveness have synergy with initiatives taken at provider level. Some countries emphasise VET institutions' room for manoeuvre to develop their own attractive profile that adapts to the profile of employers and students at local level (**AT, DE**), which is part of the general trend of decentralisation.

### Adult learning

Some national reports (**BE nl, BG, CY, CZ, EE, ES, FR, HU, IS, LT, LU, RO, UK**) emphasise measures which aim to promote lifelong learning and to motivate adults to acquire, update and complete further education. Some of the measures are:

- Improved guidance on the VET options for adults (**AT, ES, LT**). In **Spain** guidance and information about access, exams, programmes and different offers is considered a priority due to the fact that adults with a certain training level are in general more demanding and discerning in relation to their further needs. Public administrations will be in charge of disseminating and stimulating innovative approaches concerning adult education in order to promote and improve activities in this field. In **Austria** projects to expand educational information and guidance and for increasing the level of professionalism and networking of educational counselling were conducted.
- Validation/accreditation of non-formal and informal learning (**CZ, ES, FR**) (Further details on validation of non-formal and informal learning are given in section 3.2).
- “Blended-learning” activities, modularisation, e-learning and “evening classes” which facilitate reconciliation of work, family and learning activities are emerging (**AT, CY, EL, LU**). **Greece** has introduced Centres of Distance Lifelong Education and Training for Adults that combine distance learning with traditional teaching of adults. The **UK** has introduced a system of individual learning accounts, to enable individuals to buy the training they feel they need; and a new universal adult careers service, to enable individuals to receive good advice about their training needs. In Wales this has been developed into the first all-age online career service.
- Quality development and skills upgrading for adult teachers (**BG, EL, HU, LV, SE**).

As to the quality of adult education providers most national reports deal with such aspects in relation to the theme quality assurance (section 6.2). Most measures concern the establishment of quality assurance systems, inspection procedures, self-evaluation systems and quality standards to improve the provision of adult learning.

## **6.2. Quality assurance**

### VET

In general the national reports indicate good progress as to the development of quality assurance criteria and systems. The Common European Quality Assurance Framework

(CQAF) constitutes a useful framework for quality assurance within the field of VET as well as adult learning.

The increasing decentralisation and managerial autonomy of VET institutions intensifies the need for quality assurance and accountability systems. Across the countries, student and institutional performance is monitored with a variety of mechanisms and institutional arrangements including:

- The establishment of independent governmental evaluation bodies or inspectorates (**DK, NL, NO, SE, UK**). It varies between the countries whether the remit of the evaluation bodies includes all primary, secondary or tertiary education.
- Development of self-evaluation and quality management systems (**AT, EE, ES, IT, LT**). For example the **Italian** guide for auto-evaluation of education and training infrastructures which facilitates the diffusion and implementation at national level of the auto-evaluation methodology.
- Obligations for institution to use outcome and internal evaluation systems (**DK, IS**). In **Denmark**, for example, this obligation applies to all upper secondary education schools, while the **Icelandic** obligation applies to compulsory as well as secondary schools.
- Development of tests to improve transparency and quality of CVET providers (**DE**)
- In the context of VET and adult learning, several countries have introduced quality labels and quality standards that have to be achieved to receive public funding (**ES, FR, LI, LU**)

In general, countries increasingly emphasise the development of quality assurance and evaluation. However, there are differences as to how advanced the implementation of systems for evaluation and monitoring are. One group of countries established advanced quality assurance systems and independent evaluation bodies several years ago (**AT, DE, DK, IE, FI, NO, SE**). In these countries, the quality assurance procedures are comprehensive, regular, and mandatory.

In contrast, many other countries are only just introducing quality assurance systems, indicators and quality management tools for VET institutions (**BG, CZ, ES, LU, MT, RO, SI**). The quality assurance systems in progress typically comprise self-assessment as well as external assessment components.

In addition, it should be mentioned that in some countries quality assurance systems are structured around the accreditation of the training structures (**IT**).

### Adult learning

As to this theme most national reports focus on the implementation of quality assurance systems and quality standards while measures concerning quality of teaching methods

and skill requirements of staff are mainly dealt with in relation to the theme “Learning and training needs of teachers and trainers” (see section 6.6 below).

A number of countries mention that they have implemented quality assurance systems, inspection procedures, self-evaluation systems and quality standards to improve the provision of adult learning (AT, BG, FR, LI, LT, LU, RO, SE, SI, UK). Slovenia for example, has developed a model for self-evaluation 'Offering quality education to adults' (OQEA), which is comparable with models of self-evaluation in other European countries and has many elements identified in the common European quality assurance framework (CQAF). Competence development among adult teachers and trainers improving their pedagogical skills in teaching learner groups of mixed age levels and nationalities is also in focus in some countries (AT, DE).

### 6.3. Relevance of curricula and qualifications to labour market needs

#### VET

The national reports indicate that strengthening the links with the labour market is a key priority addressed by a wide range of policy measures. The measures include: curricular reforms; changes in education and training structures; enhancing developing relationships with enterprises; reviewing occupational, competence and/or education standards; and funding measures. Most countries continuously monitor and review the process.

At system level, many countries manage the skill needs in VET in well-established partnerships between the ministries of education, the ministries of labour and the social partners (EE, ES, FI, FR, IE, IS, IT). Committees representing employer and employee organisations typically evaluate and develop qualification standards. In some of the countries, expert bodies at central level conduct forecasts of future skill needs and define national skills strategies (BE nl, ES, IE). This happens at sectoral level in some countries (DK, NL, UK) see Danish example in Text box 6.1.

#### **Text Box 6.1 Denmark – anticipating future skill needs**

*Following the recommendations of the Globalisation Council, a task force was established to examine how VET could be improved vis à vis future skills needs. A study was commissioned to look at methods to identify early warnings. As a result of this study, the task force on future VET requirements recommended that an independent unit should be established in order to undertake anticipation studies relating to areas of convergence, growth sectors etc, though the government has not yet taken this recommendation forward.*

Though most arrangements for adapting skill needs are instituted at system level, many countries regard the increasing decentralisation and use of framework curricula as an important factor for improving VET providers' adaptability to regional labour market needs and the needs of students. Hence, schools are given wider opportunities for cooperation with employers' organisations through advisory committees or working groups (AT, CZ, SI, SK). Some countries deregulate accreditation conditions for VET colleges in order to start programmes with the aim of swifter adaptation to labour market

needs (**NO**). Some countries have increased apprenticeship training and on-the-job learning to enhance the link to labour market needs (**EE, FI, LT, MT, UK**) or introduced financial incentives for both the students and the entrepreneurs providing training (**HU**). Some countries try to improve the cooperation/communication between school-based and work-based components of VET (**AT, FI**).

The trend of increased autonomy and accountability means that the provider level will have increasing responsibility for the continuous adaptation of curricula in cooperation with labour market representatives at local level. Consequently, a key challenge in the coming years will be to ensure that initiatives at system level, (e.g. quality assurance procedures, forecasting of skill needs and definition of quality standards) support the provider level properly. The enhancement of joint ventures involving VET providers, companies and other relevant organisation may require further competence development among heads of schools and teachers in the coming years.

As the learning outcomes based approach is increasingly being adopted questions related to the relationship between occupational and education-training standards become more important. Occupational standards, focussing on the expected performance at the labour market, will normally influence the definition and design of education and training standards and curricula. The interplay between these two main forms or standards varies between different countries. Improving the quality of this "feed back loop" between the two is important.

### Adult learning

Only a few national reports mention adult learning measures in relation to this theme (**FR, LT, SI, UK**). In the **UK** the Sector Skills Councils advise on all vocationally-focused adult learning.

In **France**, programmes bearing the GretaPlus label are guaranteed to offer individualised services to participating trainees. The label is granted to a GRETA for all or some of its services, on the basis of an on-site audit. This means that the trainees receive truly "customised" service. The Greta label is considered to ensure greater effectiveness in services provided to companies and jobseekers and public employment services that are better suited to the communities they serve. **Lithuania** and **Slovenia** have launched programmes focusing on the integration of the unemployed into the labour market.

## **6.4. Pathways to further and higher education**

### VET

Improving access to HE for VET students is an important aspect of increasing the attractiveness of VET. In some countries, the progression from VET into higher education is already well-established (**AT, BE nl, CY, CZ, FR, IE, IS, IT, NL, NO, SE, UK**). Currently several other countries are in the process of enacting legislation and launching measures that will strengthen the pathway to further and higher education (**AT, EE, EL, ES, HR, LU, SK**). The measures and policies in these countries include:

- Adaptation of national systems of qualifications to offer qualifications that facilitate modular access, transfer, and accreditation in HE (**ES, IE, LU, RO, SK**).
- Creation of effective and functional counselling systems addressing young people and adults to enhance LLL (**NL, SK**)
- More flexibility in adult education, widening the possibility for adults to choose their own learning path that will eventually be recognized within the educational system (**HR**).
- Development of common curricula between VET institutions improving the chances for VET learners to continue on higher education level (**EE, EL**).
- Establishment of preparatory, bridging programmes, access courses and supplementary education giving access to higher education after completion of VET programmes (**AT, DE, DK, EE, FI, NO, UK**). The preparatory programmes in **Austria** have existed a long time and the measures refer to specific routes and/or reinforcing, expanding existing opportunities and effective implementation of the existing legal framework.
- It is a general characteristic of the national policies and measures that strengthening the pathways is regarded as an important means to realise their national lifelong learning strategies. Enhancing validation of non-formal and informal learning in further and higher education and training is also a key associated policy measure in several countries (see further details in section 3.2.).

Though strengthening the pathways to HE is considered to improve the attractiveness of VET, potential obstacles and tensions between policies may occur. To improve young people's prospects for further study after VET, theoretical knowledge may be given priority at the expense of practical training and on-the-job-learning. This is a cause for concern among employers (**PL**). **Sweden** is introducing apprenticeship because there is not enough practical training in the school-based route but also because many of the people pursuing the school-based route have problems completing their grades because parts of the course are theoretical and academic – geared towards assuring the level for access to higher education.

### Adult learning

Some countries have introduced more flexibility in adult education, widening the possibility for adults to choose their own learning path that will eventually be recognised within the educational system (**AT, BE fr and nl, FR, HR, PL, SE**). The preparatory programmes in **Austria**, which in 2005/2006 had about 9.500 participants, are being expanded significantly.



## 6.5. Learning outcomes based approaches

### VET

Outcome-based approaches are a key priority to enable VET and adult learning to supply a highly skilled workforce and to play an active role in developing lifelong learning policies. An outcome or competence based approach is also important: by indicating what an individual should know or be able to do at the end of a learning process as an element of making qualifications more transparent for labour market partners. The establishment of a neutral reference structure of learning outcomes based on the EQF will simplify comparison of qualifications and allow for a better match between the supply and demand for knowledge, skills and competence, and support labour market mobility throughout Europe. The rapid development of national qualifications frameworks based on learning outcomes form an important part of this shift in emphasis (see also section 3.1 and 3.2).

It should be mentioned that some national reports do not provide information on learning outcomes approaches (CY, DE, LI). However, the recent reports on progress within the Copenhagen process indicated that many countries are developing standards, curricula and redesigning examinations in line with the outcomes based approach though they do not explicitly use the term learning outcomes. In **Germany** for example the dual system encompasses many aspects of a learning outcomes approach already. The development of a German national qualification framework pays particular emphasis to the use of a learning outcome or competence based approach

As illustrated by the German case and as described in section 3.1, many countries have begun the process of establishing national reference structures. Many are also developing curricula as well as examination procedures based on learning outcomes. The descriptions of learning outcomes and levels are usually drawn up in a dialogue with social partners and representatives of different trades and industries to ensure correspondence between the standards and labour market demands (AT, ES, HU, LT, LU, NO, SE). In EU-12, curricular reforms are often being co-financed by ESF funds (CZ, HU, SI).

The ongoing comparative study on learning outcomes<sup>69</sup> illustrates that the learning the learning outcomes based approach is of particular importance in the VET field reflecting the strong link between vocational education and training and the labour market.

### Adult learning

The establishment of learning outcomes is also linked to the national lifelong learning strategies and the enhancement of adult learning. Validation of non-formal and informal learning is a key measure for motivating people to go back to learning. Learning outcomes render validation of non-formal and informal learning much easier as these provide basis for assessment. Some countries explicitly regard competence-based

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<sup>69</sup> Cedefop 2007 op.cit.

qualifications specially designed for adults facilitating validation of informal learning (AT, BE fr, EL, FI, NL, SI). **Finland** provides an interesting case of how adult learning and competence based qualifications are promoted through a personalised combination of guidance, counselling and teaching activities.

## **6.6. Learning and training needs of teachers and trainers**

### VET

The increasing managerial autonomy of VET institutions and their close relationship with the labour market make the competencies of teachers and trainers important factors influencing the quality of VET and innovation in teaching. Consequently, in the reform processes many countries place increasing focus on up-skilling teacher competencies to achieve modernisation of school curricula and the enhancement of teaching and learning processes. Team planning, advising, and supporting learners using individualised teaching plans, ICT-tools, project learning and problem solving are increasingly important aspects of competence.

Many countries have launched a variety of measures emphasising continuing professional development of teachers. However, the extent to which continuing professional development is mandatory differs between countries. Some countries have introduced obligations and funding mechanisms to encourage professional development. In **Denmark**, for instance, VET institutions are obliged to draw up a plan for in-service training efforts to receive grants earmarked for upgrading teachers.

Compared to other educational sectors, teachers and especially trainers in VET are less likely to have formal teaching qualifications because they are experienced vocational practitioners who take on teaching roles. Flexible educational programmes are required to fit educational activities into the working life, especially as regards trainers. In **Finland**, for instance, a vocational teacher's pedagogical studies can be completed as full-time, multimode, or competence-based qualification studies, which make it possible to study while working. Such part time-models also exist in other countries. **Austria**, for example, has developed modularised routes to further qualification/training for adult learning professionals.

Gradually, countries are setting requirements for the role and competence requirements of trainers which in some countries have hitherto been formalised or regulated to only a limited extent (**LT**, **SE**). Consequently, the increased importance of partnerships between schools and the world of work intensifies the need for quality standards for trainers' competencies and functions.

### Adult learning

The increasing emphasis on LLL and adult learning means that many VET teachers face new target groups and competence requirements. Teaching adults requires a different pedagogical approach than teaching young people.

Consequently, the up-skilling also involves relational competences of teachers and trainers. In **Italy** for instance, regional and national programmes have been launched to reinforce the capacity to work not only on content but also on person's empowerment, experience valorisation and maintenance of motivation levels, especially for the disadvantaged groups at the social, professional and occupational level.

Quality development and skills upgrading for adult teachers and trainers are mentioned in a number of national reports (e.g. **AT, BG, DE, EL, ES, FR, HR, HU, IE, IT, LV, SE**). Most national reports focus on competence development of teachers and trainers, while the competence development of other categories of staff such as management and administrative staff, tutors and guidance personnel etc. are only to a limited extent mentioned explicitly.

## **6.7. Learning partnerships**

### VET

The implementation of reforms in the context of VET and adult learning requires good learning partnerships at system level, between governmental bodies, social partners and stakeholders and at the provider level, e.g. between the educational institutions, enterprises and labour market parties at local level.

At system level, many national reports specify working institutional arrangements involving government departments, mainly ministries of education and labour, social partners and other key stakeholders. The learning partnerships typically cooperate and establish agreements on national systems of qualifications, teaching and training activities and guidance. LLL and continuous adult education are currently important issues. Some countries have a long tradition of involving social partners and stakeholders, and the institutional arrangements typically include a comprehensive network of consultation committees (**AT, DE, DK, ES, FR, IS, LU, NO, SE**). Other countries are in a more preliminary phase of building up institutional arrangements at system level (**BG, CY, EE, EL, LT, PL, SI, TR**).

At provider level, the increasing decentralisation and managerial autonomy of VET institutions means that guidance, team-working, cooperation with enterprises and communication with stakeholders is of growing importance. To be able to plan teaching and learning processes based on a framework of curricular guidelines, VET providers increasingly have to take real-life work contexts into account. A key challenge in this field is to establish partnerships which commit stakeholders in a balanced representation, influence and consensus.

Cooperation with companies is important to update and translate curricula into instructional designs. A future challenge will be to strengthen the competencies of school management, teachers, and trainers to work in such partnerships. Several countries are strengthening institutional arrangements at regional, sector and local level to advance partnerships that integrate learning and working (**HU, NL, UK**) and provide placements in enterprises also to teachers (**FI**).

### Adult learning

Only a few national reports mention learning partnerships in the field of adult learning specifically (**AT, EE, FR, LT, NL, SI, UK**). The cooperation between ministries, social partners, educational providers and companies is considered crucial in the development of LLL strategies.

## **6.8. Social partner involvement in training**

### VET

Many countries have long traditions of strong consultative arrangements involving the social partners in the process of identifying skill needs, defining qualification frameworks and the formulation of training policies (**AT, BE nl, CY, DE, DK, ES, FI, FR, HR, IT, IE, LT, LU, NO, SK**). Some countries are in the preliminary phase of involving social partners in this manner (**EE, EL, LV, PL, RO, SI**). Often, governmental bodies at central and regional level have been formed to coordinate qualification systems, while sectoral vocational committees develop vocational standards. In **Romania**, reinforcing social partnership in initial and continuing training has been a concern in recent years. Social dialogue Sectoral Committees involving social partner representatives at sectoral level have been established.

One challenge for the countries at the preliminary phase of involving social partners is that organisations representing business interests are weak and fragmented. This creates the risk of dominance and enforcement of individual interests, which is disadvantageous from the point-of-view of representing the whole of the economy. Such concerns are expressed in the Hungarian report.

While most countries have well-developed traditions for involving the social partners at national level, there is a trend of more intense involvement of social partners at regional and local level (**FR, IT, NL, NO, SE, UK**). In the **UK** for instance, employers, education and training providers and government agencies are working together at regional level in England to develop coordinated approaches to skills issues through Regional Skills Partnerships, and local partnerships bring together actors to develop and coordinate initiatives to widen participation in higher education, including vocational routes. (Further details on learning partnerships are given in section 6.7).

### Adult learning

Only a few national reports briefly comment on adult learning measures in relation to this theme (**FR, HR, HU, LT, SE**). In some countries the involvement of social partners in the field of adult learning is well-established (e.g. **AT, CY, DK, FR, LU, NL**) while the involvement is still rather fragmented in others (e.g. **HR, HU, SI**).

## **6.9. Widening access and improving equity of participation, treatment and outcomes**

### VET

Initiatives on access and equity are often transversal across all types of education and training. Therefore the measures described in many national reports are often not specific to VET and adult learning (for further details see also section 3.4.6.) Most measures relevant to this section concern updating of basic skills and/or initiatives targeted at non-nationals.

There are several dimensions of access: policy-related, provider-related (e.g. cost, entry requirements), informational, situational (e.g. cultural value attached to education, life situation, family and social environment) and dispositional (e.g. self-esteem and self-confidence of the learner linked to failure in previous educational experiences). In several countries, new legislative measures form a broad and comprehensive framework for policy actions in the field of access and equity (**BG, ES, FI, SE**).

In upper-secondary VET measures to improve access and equity include:

- increased and tailored guidance (**DE, LU**)
- financial support for learners on low incomes (**UK**).
- VET programmes adapted to meet diversity of student needs such as step-wise qualifications. These however have to correspond to existing occupations in the labour market. They equally provide for options to return to education at a later stage for example:
  - A new apprenticeship scheme for students with weak theoretical foundations (**DK, EE**)
  - Possibility to alternate or change from school-based training to practical professional training in traditionally schools-based systems (**EE, IT, SE**)

For further details see also section 6.10 concerning measures aimed at different disadvantaged groups.

### Adult learning

With increased knowledge and technology intensity in a society, basic skills become a precondition to reducing drop-out rates, enhancing employment and employability and to civic participation. Therefore some countries have developed particular initiatives to focus on basic skills for adults and disadvantaged groups (**AT, BE fr, CY, DK, EL, HR, IE, LT, LU, MT, SE, UK**). (Text Box 6.2).

## Text Box 6.2 Denmark - Initiative to improve adults' basic skills

*Denmark has set a target to increase the number of participants in reading, writing and mathematics courses for adults. 40,000 participants per year are expected to participate in such training. This will be complemented by outreach activities and guidance and consultancy. Flexible delivery methods are anticipated and it should be possible to combine these basic skills courses with adult vocational training.*

In January 2007 **Sweden** introduced the right to take part in basic education for those with severe learning disabilities. This means that all adults, who reach certain conditions, now have the right to basic education.

Equity and efficiency go hand in hand in many labour market training measures to integrate persons of another ethnic origin. **Austria** has managed to train approximately 39.000 non-nationals in 2006 thanks to specifically tailored measures.

Appropriate infrastructures are another dimension of access. **Cyprus**, for example, has put in place a comprehensive infrastructure, comprising of 300 Adult Education Centres, with courses offered tailored to adults' needs.

Widening access also depends on background factors other than the improvement of basic skills, while access to adult learning can be limited due to social, economic, cultural or geographical reasons and barriers such as lack of time, motivation, information and financing. In addition, participation in education and training tends to be proportional to the level of prior education. In 2005 only 3.4% of the population aged 25-64 with less than upper-secondary education participated in education and training in the four weeks before the survey<sup>70</sup>. The fact that many initiatives do not reach people with a low level of initial education is a key challenge for policy-makers.

The measures in several countries indicate the awareness that widening access to adult learning requires a broad effort addressing social and cultural barriers. In **Spain** for example, new laws pay special attention to people with family responsibilities, victims of gender violence and disabled persons and include improving equity in their participation and providing economic support. In **Lithuania** projects supported by the Cohesion Policy Programmes funds target the accessibility of learning, by removing existing obstacles for adults to acquire occupations and skills demanded for on the labour market and encouraging education institutions to develop different programmes for risk groups.

Financial assistance is assigned to the projects, directed towards risk groups such as sentenced adults and former convicts; older women; mentally or physically disabled; former convicts; and drug addicts. Since 2005 **Portugal**, for example, has been investing in widening access to VET and adult learning through the New Opportunity Initiative to deliver 1,000,000 diploma qualifications through the VET and adult learning systems.

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<sup>70</sup> Commission staff working paper. Progress towards the Lisbon Objectives in Education and Training 2006, p. 138.

Many countries emphasise measures improving the educational opportunities for immigrants/ethnic minorities. (e.g. **AT, DE, NO, SE, FI, IS, CZ, SI, PL**).

## **6.10. Opportunities for disadvantaged groups**

### VET

Youth and particularly, young dropouts, or youth finding it difficult to obtain an upper secondary qualification are a high priority the VET systems of many countries (**AT, BE nl, BG, CY, HU, IE, IS, IT, LU, LV, MT, NO, RO, SE, UK**).

Apprentice-like schemes are seen as central to re-integration. In **Denmark**, the employer based entry route to VET has been revitalized with the reintroduction of the craft's apprenticeship, as one of the ways to obtain a vocational qualification. Intensive measures have been introduced to reduce dropout from upper secondary VET, which remain high. The **Netherlands** has introduced legislation on qualification obligation to reduce the number of early school leavers. Mechanisms to identify groups at risk, and counselling instruments are integrated in these approaches. **Slovakia** has taken approaches towards unemployed early school leavers with second chance schools based on a strong public private partnership and innovative teaching and counselling methods.

### Adult Learning

The improvement of opportunities in the field of adult learning is a many-sided challenge because the disadvantaged groups are disadvantaged for many different reasons. Looking across the countries, measures launched reflect the range of the challenge.

Some groups living in rural or disadvantaged areas are disadvantaged due to geographical and socio-economic factors. Such groups are hard to reach and require new forms learning provision. In **Romania**, adult people from rural areas are considered an important disadvantaged group and programs are launched to encourage participation in education and training. Training programmes run by the public employment services in **Romania** reached approximately 15.000 people in 2006.

Lack of basic skills is a key challenge for many disadvantaged groups, especially for older workers. Consequently, second chance programmes are central to re-integration of disadvantaged adults. **Greece** has taken a number of measures in that respect as part of wider social and employment policies. The same applies to **Bulgaria**. In **Poland**, Internet and multimedia are used in the provision of second chance programmes to adults. **Romania** and **Slovenia** also have comprehensive second chance programmes. Basic language skills are also central to inclusion. **Liechtenstein** offers training courses for persons of another ethnic origin, for example mothers and children together in language and other civic topics. **Estonia** and **France** have implemented similar initiatives. **Ireland** has introduced outreach mechanisms towards adults with the aim that parents' attitudes to schooling will impact their children.

Other adult groups, such as prisoners and drug-addicts are disadvantaged due to more specific social problems and may have special learning needs.

In **Sweden** the Swedish Prison and Probation Service has from June 1 2007 been given the opportunity to arrange education in accordance with public schooling for adults. The Service must thus establish its own head teacher function and come under the auspices of the National Agency for Education. It must also follow existing regulations concerning teacher eligibility and related factors.

## **6.11. Gender issues**

### VET

Many of the national reports describe policy initiatives addressing gender issues which have a much wider perspective than VET and adult learning (see also sections 4.9, and 5.5.) Such measures typically apply to all levels of the education and training systems and the labour market.

Measures to eradicate gender stereotyping and promote equal opportunity are a continuous element in all countries' education policies. Over the last decades, many countries have enacted general legislation establishing equal rights and opportunities for women and men. However, there are differences across the countries as to the gender issues that are considered the most important to address.

In some countries, where gender policies are less advanced, enhancement of women's labour market participation is regarded as a key challenge and initiatives have been launched for the training of economically inactive and unemployed women. Typical such measures include information campaigns to influence cultural behaviour and attitudes or initiatives to prevent stereotyping of women in the media. In some countries, public bodies to monitor progress on gender issues have been set up. Measures funded by the EQUAL Community Initiative have helped women who have lost contact with the labour market to reintegrate into active economic life (**CY, CZ, ES, LT, MT, SI, TR**). In **Cyprus**, a large project has been launched, funded by the ESF, aiming at the training and improving the employability of inactive women.

In countries where gender policies are advanced, gender imbalances in the educational system and gender discrimination on the job market are considered the most important issues (**FI, FR, LU, NL, NO, SE, SI, UK**). The gender imbalances have been longstanding, and most countries report that they are difficult to change.

Most students in the social affairs and health areas are women while most students in technology areas are men. Similar gender patterns apply to other education levels, e.g. secondary, post-secondary and HE. The trend cited by several countries is that more women apply for and are admitted to upper-secondary education and tertiary education and that they have a lower dropout rate than men. (**HU, FI, IS, NO**). The 2006 progress report<sup>71</sup> indicated that women have closed the gender gap in recent years and now record higher participation rates and attainment levels than men. Women have, on average, a

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<sup>71</sup> Commission staff working paper. Progress towards the Lisbon Objectives in Education and Training 2006, p. 87.



five percentage point lead in the completion of upper-secondary education among young people aged 20-24 in the EU25. (Countries in which women have more than a 10 percentage point lead over men include **CY**, **ES**, **IT**, **PT**, while countries with better gender balance include **CZ**, **SK**, **UK**. Efforts are being made in several countries to improve the attainment levels of men in upper-secondary education.

The main aim of existing measures is to encourage boys and girls to make conscious educational choices, emphasising non-traditional choices of education and career for pupils in and after upper secondary education and training. Educational choices of young people should be reflected and go beyond the traditional gender barriers and reflect their own interests and talents.

Current policy initiatives in many countries are intended to increase women's representation in technical disciplines. Some of the measures include improved guidance, innovation of apprenticeship training and the encouragement of awareness of the possible differences in the actions of teachers and pupils in lessons in which technology plays a significant role (Text Box 6.3).

**Text box 6.3 Finland - Initiative to improve the gender balance in admissions to VET**

*In **Finland**, in 2004, 92% of students in the fields of social affairs, health, and sports were women, and 85% of students in technology and transport were men. In order to balance these figures, the Ministry of Education reviewed the requirements for admission to vocational education. A measure was introduced which gave two additional admission points to students applying for studies in a field where less than 30% of the primary applicants were of the same sex as the applicant. Whilst in practice, these additional points only had limited impact; they were left in the admission requirements to encourage gender equality and help to prevent segregation problems.*

Adult learning

In 2006 an average of 9.6% of Europeans aged 25-64 participated in education and training activities during a "four-week period" (the present definition of participation in lifelong learning), which is even slightly less than in 2005. On average women participated in education more than men<sup>72</sup>.

Some countries have implemented measures addressing gender issues in the field of adult learning. Mainly, the measures aim to motivate women to participate in lifelong learning activities to improve their employability or re-entry to the labour market (**AT**, **EL**, **LT**, **MT**). In **Lithuania**, for example, the project "EQUAL HIGHWAY", implemented by the EQUAL Community Initiative, helps women who have lost contact with the labour market, reintegrate into active life. Women and long-term unemployed individuals are supported by the "Individual Professional Career Planning Profile.

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<sup>72</sup> Commission staff working paper, Progress towards the Lisbon Objectives in Education and Training 2007 p. 67

## 6.12. Increasing participation in lifelong learning

Numerous measures are being taken to increase participation rates in LLL to improve labour market integration and social cohesion (CY, EE, FI, LI, RO, SE). The +50 age group is one key target group (AT, CZ, FR, HU, SI, UK). The **Czech Republic** has taken a particularly interesting measure with Universities of the Third Age and **France** is taking comprehensive transversal measures to expand opportunities for older workers to participate in LLL as a basis for labour market inclusion.

The low-skilled and/or unemployed are another key priority (BG, CZ, DK, EL, HU, ES, IE, NL, SI, UK). Basic literacy, numeracy, and ICT skills are central role in most initiatives. An example is the Hungarian HERON programme that focuses on new technologies. Given that the target groups can be difficult to reach, in some countries new priorities have led to new governmental agencies. For example the Cross Ministerial Directorate on Working and Learning (NL); and the Basic Skills Unit (MT). In others specific fiscal or programmes measures have been developed (ES, NO). Regional/local units have a strengthened the links between labour market policies, regional economic development and LLL in many contexts (PL, TR, EL, MT, UK).

Three examples illustrate the transversal scope of LLL: **Malta** has created the programme 'My Web Corporate' to address ICT as an economic sector. Recognising that it can be difficult to reach SME, in **Finland** a programme has been created that links company strategy, building staff competencies and change management. In **Iceland** lifelong learning centres in rural areas have strengthened the links between labour market policies, regional economic development and lifelong learning.

Some countries specifically mention validation of non-formal and informal learning as a measure to increase participation rates and raise qualification levels in the population (ES, NL, PL, SK). **Slovakia** is establishing an authority for this purpose. Legislative measures are also used (CZ, DK). **France** has legislation through which all seniors with more than 20 years work experience have the right to have their competencies assessed. Improved counselling measures are also relevant (DK, IE, LT, SK, TR).

## 6.13. Governance and leadership

### VET

The national reports mainly focus on the organisation of responsibilities between central authorities and VET institutions. The involvement of stakeholders is dealt with in sections 6.7 and 6.8.

A dominant element of the governance reforms of the VET systems reported in many of the national reports is the trend towards more autonomy for education providers. The trend is evident in many participating countries (DE, EE, ES, FI, FR, HU, LT, LU, RO, SE, UK). In general the trend towards more autonomy involves the whole VET system, and the national reports do not differentiate between initial VET, CVE and VET in HE on this issue. Only a few countries report specific governance reforms concerning adult

learning (**LT, RO**) mainly concerning ministerial reorganisation of competences to ensure a more coherent implementation of LLL strategies.

In general, the autonomy processes involves ministries of education granting VET providers authorisation to provide education, define the overall educational mission, and directing the providers' work through legislation, funding, curricula frameworks, national qualification requirements, and information.

The education providers make independent decisions on most of the practical arrangements for educational provision. In many countries, the process of autonomy and accountability is supplemented by financing systems that give the education providers increasing freedom to allocate public funds in relation to the volume of education, guidance and counselling, student welfare services and measures for special needs students etc.

Institutional autonomy is not an end in itself. The process of increasing autonomy of the institutions is regarded as a key measure to enhance institutional efficiency and adaptability to shifting educational demands and labour market needs at local level. Consequently, the process of granting more autonomy involves deregulation and “de-bureaucratising” reforms. These remove detailed regulation, allowing room for the institutions' own educational initiatives within the framework of clear administrative relationships to the national authorities (**NL, PL, SE**).

Increasing the autonomy of VET and adult learning providers involves several challenges. Improvement of institution leadership and of management competencies are considered key challenges in countries in the early stages of reform (**BG, RO, TR**) as well as in countries where a autonomous system has been going on for some time (**BE nl, DE, FI, UK**). Strengthening leadership is important to turn education providers into learning organisations implementing education provisions in a knowledge-rich environment. Several countries are introducing training and management development programmes for heads of schools, forecasting systems and self-evaluation tools (**DK, FI, HU, UK**).

The autonomy trend requires quality assurance systems to balance the increasing managerial autonomy of providers and to ensure provision of good-quality education. Some countries have introduced performance-based indicators in their funding systems and monitoring assessment systems for tracking progress (**CZ, FI, HU**). This should encourage schools to perform to the best of their ability. It appears that accountability systems generate the best results when they include control measures as well as follow-up measures for development.

In some countries, the VET systems and adult education providers are in an institutional capacity building phase. Apart from autonomy and accountability, other challenges concerning governance in these countries are: strengthening educational territorial coverage; improving institutional integration; and, coordination (**HU, LT, LV**).

## Adult learning

Only a few countries report specific governance reforms concerning adult learning (**AT**, **HR**, **LT**, **PT**, **RO**, **SE**) – but in some countries, such as the **UK**, it is largely the same organisations that provide adult learning as provide VET. The reforms in **Lithuania**, **Romania** and **Croatia** mainly concern ministerial reorganisation of competences and monitoring systems to ensure a more coherent implementation of LLL strategies. In **Lithuania**, for example the structural reorganisation of the Ministry, transformed the Adult Education Division into the Continuing Education Division, with the aims of developing state education policy on lifelong learning and adult continuing education; and coordinating the implementation of the “lifelong learning ensuring strategy”. In **Austria** the institution providing training for trainers for adult education has been given increased economic and managerial autonomy. In **Sweden** the Government emphasised in its 2007 budget bill that it considers independent adult education important in providing adults with the same opportunities as children and young people to choose an education based on their wishes and needs. In **Portugal**, the government and all social partners recently signed an agreement for the reform of VET.

### **6.14. Private investment**

#### VET

Most national governments of participating countries recognise that the necessary reforms cannot be accomplished within the current levels and patterns of investment. The stimulation of private investment in VET<sup>73</sup> and adult learning is a key priority in many countries. Through the Lisbon Objectives, the EU has emphasised the necessity of increasing public funding, while at the same time aiming for higher contributions from other sources, both individuals and companies. The 2006 progress report<sup>74</sup> on education and training indicated that private spending had stagnated and that increased private contributions are necessary to increase availability of resources and improve efficiency of expenditure.

Increasing private investment of individuals and households through cost-sharing policies is the most commonly cited measure to increase investment in the 2007 national reports, though information provided is generally scarce.

Measures taken are in most instances embedded in policies to encourage a demand-led behaviour and are accompanied by increased institutional autonomy. The general pattern is that education and training is paid up to a certain age/and or skills level for reasons of access and equity. For example, in the **UK** education and training is free for all up to the

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<sup>73</sup> Normally mainly refers to CVET (continuing VET); in countries with traditional apprenticeship system, enterprises cover part of the costs in IVET (initial VET).

<sup>74</sup> Commission Staff Working Document, Annex to the: Communication from the Commission Modernising education and training: a vital contribution to prosperity and social cohesion in Europe. Draft 2006 joint progress report of the Council and the Commission on the implementation of the “Education & Training 2010 work programme” COM(2005) 549 final.

age of 18 and for all, regardless of age, when it concerns courses leading to basic skills and first level 2 qualifications.

Many countries attempt to raise employers' investment, involvement, and financial responsibility in the provision of on-the-job vocational training<sup>75</sup>. Such actions are undertaken to realise key policy objectives such as: to ensure good quality of work-based learning and/or to provide enough apprenticeship places. To encourage the provision of apprenticeship places, several countries have introduced economic incentives in the form of grants or tax reductions for each apprentice taken on (**AT**, **FR**). The French approach is described in Text Box 6.1.

#### **Text box 6.4 France: Contributions to develop Apprenticeships**

*In **France**, legislation introduced in 2005 offers companies that employ an apprentice a tax deduction of € 1600 per year per apprentice and up to 2200 € for young people with disabilities or facing disadvantages.*

Another parallel development is the efforts of many countries to strengthen vocationally oriented adult and in-service training of employees. Many countries stimulate private investment from individuals, households and employers through incentives such as vouchers or individual learning accounts (**AT**, **UK**), tax incentives (**CY**, **EE**, **FI**, **HU**, **LT**, **LU**, **PT**, **SI**), training funds (**HU**, **IS**, **PL**). However, such general measures always bear the risk of dead-weight. In **Hungary** for example, training fund contributions aimed at micro-small and medium sized enterprises have been expanded based on good experiences. While in **Poland** a survey has shown that training funds by themselves do not lead to the intended behaviour of companies, unless accompanied by complementary measures.

Despite the initiatives undertaken, further efforts may be required to raise employers' investment, particularly in the EU-12.

#### Adult learning

Only few of the national reports (**AT**, **DK**, **FI**, **UK**) mention specific measures to increase private investment and participation in adult learning. In **Austria** Educational accounts of 100 € a year and 'vouchers' (Bildungskonto, Bildungsgutschein) for adult learning have been introduced in some Länder. Between 2002 and 2006 about 290,000 vouchers were issued. Also **Finland** has introduced specific 'aid forms' for adult learners. In **Denmark** private investment in adult learning and continuing education is a common feature and encouraged further by the Government's decision to make increased Government support dependent on increased financial commitment by the employers. In the **UK** (England), the Train to Gain programme offers employers a brokerage service to help identify training needs and find appropriate training provision to meet them.

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<sup>75</sup> See also Cedefop: Zooming in on 2010 chapter 4.5.2.2., op.cit.

## 6.15. Summary

In general, the national reform processes in VET and adult learning are progressing in line with the key objectives of the Lisbon Strategy and the Copenhagen process, as well as the more recent Commission Communication on Adult Learning and the upcoming Adult Learning Action Plan.

The 2006 joint report identified the following three key challenges in the field of VET and adult learning:

*The quality and attractiveness of VET and adult learning.* Good progress has occurred in most countries in this area. In most countries the decentralisation process is balanced by the establishment of quality assurance and evaluation systems that ensure the accountability of education providers. Some countries already have advanced and comprehensive quality assurance systems while other countries, mainly the EU12, are in development phase.

In many countries priority is being given to improving the image and attractiveness of vocational pathways for employers and individuals in order to increase participation in VET and adult learning. The measures to enhance their attractiveness include: flexible progression routes between systems; more flexible, modular and accumulative structures to facilitate the entry to initial VET as well as the return to the educational system; improved guidance on the VET options for adults; validation/accreditation of non-formal and informal learning; and, improving quality. Many countries use a combination of these measures.

*Forecasting skills and qualification needs.* Good progress has occurred with measures to reinforce the link with VET and labour market needs. However, little information has been provided in the national reports on specific measures concerning forecasting skills and qualification needs, though some countries have established expert bodies at central or sectoral level.

*Adults and older workers are given insufficient priority.* What is lacking throughout the national reports is a strong signal that attention is being paid to continuing vocational training and upgrading the skills of the workforce in general. One reason for this may be the difficulty in finding evidence of what employers are doing in terms of competence development of their staff. Clearly, initiatives are being introduced nationally to improve the basic skills of groups at risk, including low skilled workers. Nevertheless, when seen in the context of enlargement, the numbers have not fallen since Maastricht Communiqué in 2004. By 2030, the EU will have almost 14 million more older people, 9 million fewer young people, and 2 million fewer learners in VET. Given this demographic trend, future labour markets will rely more on older workers and migrants. More attention to the lifelong learning and training of these two groups is urgent in all but a few Member States.

*Relevance of curricula and qualifications to labour market needs.* The national reports indicate that strengthening the links with the labour market is a key priority addressed by a wide range of policy measures. The measures include: curricular reforms; changes in

education and training structures; enhancing developing relationships with enterprises; reviewing occupational, competence and/or education standards; and funding measures. At system level, many countries manage the skill needs in VET in well-established partnerships between the ministries of education, the ministries of labour and the social partners. Committees representing employer and employee organisations typically evaluate and develop qualification standards. The trend of decentralisation means that the provider level will have increasing responsibility for the continuous adaptation of curricula in cooperation with labour market representatives at local level. Consequently, a key challenge in the coming years will be to ensure that initiatives at system level, (e.g. quality assurance procedures, forecasting of skill needs and definition of quality standards) support the provider level properly.

*Pathways to further and higher education.* Many countries regard improving access to HE for VET students as an important aspect of increasing the attractiveness of VET. In some countries, the progression from VET into higher education is already well-established. Several other countries are in the process of enacting legislation and launching measures that will strengthen the pathway to further and higher education.

Strengthening these pathways is regarded as an important means to realise their national lifelong learning strategies. Enhancing validation of non-formal and informal education in further and higher education and training is also a key associated policy measure in several countries. Though strengthening the pathways to HE is considered to improve the attractiveness of VET, potential obstacles and tensions between policies occur. To improve young people's prospects for further study after VET, theoretical knowledge may be given priority at the expense of practical training and on-the-job-learning. This is a cause for concern among employers.

*Learning outcomes based approaches.* Several countries have commenced the process of establishing learning outcome-based qualification systems which will simplify comparisons of qualifications, improve mobility and allow for validation of non-formal and informal learning. The shift towards learning outcomes also reflects the need to increase transparency and accountability of VET qualifications for the labour market. Much scope still remains to extend the approach to adults to improve their motivation and give them access to flexible assessment.

*Learning and training needs of teachers and trainers.* The overall shift of focus from teaching to learning requires considerable changes in teachers' and trainers' roles. Teachers and trainers are required to act as counsellors, coaches and facilitators of learning, they need to work in teams, and to plan, describe and reflect on their own teaching practices. Services to dropouts and disadvantaged groups require that both teachers and trainers develop relational and motivational competences. Similarly, the promotion of adult learning means that teachers in this sector need specific pedagogical training.

Many countries have launched a variety of measures emphasising continuing professional development of teachers though a key difference between countries is whether such development is mandatory or not. A potential barrier to professional development of teachers, and especially trainers, is to fit further training into their

working life. Flexible educational programmes may be required to make it possible to study while working. The enhancement of joint ventures involving VET providers, companies and other relevant organisations require heads of schools and teachers to develop their managerial and organisational skills while trainers in the workplace need further pedagogical training.

*Learning partnerships.* The reform processes in most countries involve social partners and relevant learning partnerships, at national, regional and local level as a means of sharing responsibilities and costs between the relevant actors (i.e. institutions, public authorities, social partners, enterprises, sectoral organisations, community organisations). In some countries the partnerships are already well-established while other countries, mainly the EU-12, are in a more preliminary phase of involving social partners.

*Social partner involvement in training.* Many countries have long traditions of consultative arrangements involving the social partners in the process of identifying skill needs, defining qualification frameworks and the formulation of training. Some countries are in the preliminary phase of involving social partners in this manner. One challenge for the countries at the preliminary phase of involving social partners is that organisations representing business interests are weak and fragmented. This creates the risk of dominance and enforcement of partisan interests. There is a trend towards more intense involvement of social partners at regional and local level.

*Widening access and improving equity of participation, treatment and outcomes.* In several countries, new legislative measures form a broad and comprehensive framework for policy actions in the field of access and equity. Some countries have developed initiatives focussed on basic skills for adults. In upper-secondary VET, measures to improve access and equity include: increased and tailored guidance; and VET programmes adapted to meet diversity of student needs such as step-wise qualifications.

*Opportunities for disadvantaged groups.* Youth and particularly young dropouts, or youth finding it difficult to obtain an upper secondary qualification are high priorities for VET provision in many countries. Apprentice-like schemes and second chance programmes are seen as central to re-integration. For ethnic minorities the provision of basic language skills is often mentioned, but the specific training needs of migrants and ethnic groups still require particular attention.

*Gender issues.* In some countries, enhancement of women's labour market participation is regarded as a key challenge and initiatives have been launched for the training of economically inactive and unemployed women. The EQUAL Community Initiative has been successful in helping women to reintegrate into active working life.

Current policy initiatives in many countries are intended to increase women's representation in technical disciplines. Some of the measures include: improved guidance; innovations in apprenticeship training; and the encouragement of awareness of the possible differences in the actions of teachers and pupils in lessons in which technology plays a significant role.



Nevertheless, gender imbalances in education and occupations persist, as well as stereotyping with regard to vocational choices, e.g. most students in the social affairs and health areas are women while most students in technology areas are men.

*Increasing participation in lifelong learning.* Numerous measures are being taken to increase participation rates in lifelong learning to improve labour market integration and social cohesion. Given that the target groups can be difficult to reach, in some countries new priorities have led to new governmental agencies. In others specific fiscal or programmes measures have been developed. Regional/local units have strengthened the links between labour market policies, regional economic development and lifelong learning in many contexts. Some countries specifically mention validation of non-formal and informal learning as a measure to increase participation rates and raise qualification levels in the population. Improved counselling measures are also relevant. Despite the measures mentioned, recent EU data indicate decreases or stagnation in adult participation in some countries.

*Governance and leadership.* The governance and leadership reforms emphasise increasing decentralisation and managerial autonomy of VET institutions, improving their efficiency and adaptability to labour market needs.

*Private investment.* Increasing private investment of individuals and households through cost-sharing policies is the most commonly cited measure to increase investment in VET in the 2007 national reports. However, information provided on countries' attempts to raise employers' investment, involvement, and financial responsibility for staff training is scarce. To encourage the provision of apprenticeship places, several countries have introduced economic incentives in the form of grants or tax reductions. To stimulate private investment from individuals, households and employers, many countries are using incentives such as vouchers or individual learning accounts, tax incentives, and training funds.

## **7. EU IMPLEMENTATION OF THE EDUCATION AND TRAINING 2010 WORK PROGRAMME SINCE THE 2006 JOINT INTERIM REPORT**

This section of the staff working paper takes stock of the progress made at EU level to date since the 2006 Joint Interim Report in achieving concrete outcomes at European level and thus provides an update of the Commission Staff Working papers from 2003<sup>76</sup> and 2006<sup>77</sup> covering the first four years of implementation of the Education & Training 2010 work programme (see also chapter 1).

The 2005-2007 period represents the second phase of the implementation of the work programme moving from the setting of objectives to implementation.

### **7.1. Coordination, monitoring and dissemination of E&T 2010**

The Education and Training 2010 work programme involves different activities using various working methods depending on the nature of the thematic priority being addressed. The aim is to ensure a flexible approach which takes fully into account the specific needs of countries and of thematic priorities in terms of policy development and implementation. The tools involve for example clusters, peer learning activities, networks and the activities under the Copenhagen process.

A strong emphasis has been placed on supporting the 32 participating countries' efforts to put in place coherent and comprehensive national strategies by the end of 2006. This ambition was set by the Council and the Commission in the 2004 Joint Interim Report on the implementation of E&T 2010 and endorsed by the 2004 European Council.

#### *7.1.1 Strengthening support to implementation at the national level through peer learning*

Peer Learning Activities (PLAs)<sup>78</sup> have been undertaken since 2005 by clusters of countries sharing common interest in a thematic priority<sup>79</sup>. The current clusters focus on eight topics: 1) Modernisation of higher education; 2) Teachers and trainers; 3) Making best use of resources; 4) Maths, science and technology; 5) Access and social inclusion; 6) Key competences; 7) ICT; and 8) Recognition of learning outcomes.

The work of the clusters and PLAs is intended to contribute, on the one hand, to the initiation of the policy development process at the European level (reflection, ideas) and, on the other hand, to support national policy development and implementation of agreed

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<sup>76</sup> SEC (2003) 1250 of 11.11.2003.

<sup>77</sup> SEC (2005) 1415 of 10.11.2005.

<sup>78</sup> Peer learning is a process of cooperation at European level whereby policy makers and practitioners from one country learn, through direct contact and practical cooperation, from experiences of their counterparts elsewhere in Europe in implementing reforms in areas of shared interest and concern.

<sup>79</sup> The word "cluster" is used to mean the regrouping of interested countries around a specific theme, corresponding to their national policy priorities, and on which they have expressed a desire to learn from other interested countries, or to share with others their successful or unsuccessful experiences.

European objectives and principles through mutual learning and exchange of good practice.

Outcomes of the clusters and PLAs since 2006 are presented in section 7.2.2.

### *7.1.2 The Education and Training 2010 Coordination Group (ETCG)*

In order to support a more efficient and coherent implementation of the work programme, the Commission set up in December 2005 an Education and Training 2010 Coordination Group (ETCG)<sup>80</sup>. While overall political, formal and legislative issues are dealt with at Council level, the ETCG oversees the operational management and implementation, in an integrated way and in a lifelong learning perspective, of E&T 2010. The ETCG keeps an overview of this process; acts as an interface between the national level and the European work programme; acts as a sounding board for the outcomes of the various activities held to implement the work programme<sup>81</sup>, and helps to facilitate the involvement of relevant stakeholders.

Since 2005 the ETCG has held five meetings. The group dealt with a number of important operational issues in relation to E&T 2010, notably the work of the clusters and peer learning activities, the use of the Cohesion Policy programmes for education and training, participating countries' progress on putting in place coherent and comprehensive lifelong learning strategies by the end of 2006<sup>82</sup>, and the analysis of the national reports under E&T 2010.

Presentations and discussions of the work of clusters and peer learning activities ensured that all countries, while they focus their participation in a limited number of clusters, have the opportunity to make an input to the overall process. The discussions have revealed a number of positive outcomes, including that participating countries are highly supportive of the process, and that they find it of increasing relevance and benefit. A number of countries have also reported that clusters and peer learning have already had a direct impact on national policy development and implementation for example on designing national qualifications frameworks (NQF) and validation of non-formal and informal learning; on higher education reforms; and on impact of ICT on teacher training.

Presentations and discussions on participating countries' progress on the development and implementation of coherent and comprehensive lifelong learning strategies showed more progress than was evident from national summary documents prepared in advance. However, it was clear that the 2006 deadline would not be met in most cases as countries

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<sup>80</sup>The ETCG is composed of representatives from ministries responsible both for general education (including higher) and initial and continuing vocational education and training from the 25 Member States and the 7 EEA and candidate countries, and the social partners at European level.

<sup>81</sup>For example, the outcomes of the clusters/peer learning activities feed back to the ETCG. The coordination group hence acts as an interface between the policy level and the various activities organised.

<sup>82</sup>Other important issues were discussed such as the 2006 Lisbon follow-up; the 2006-2008 National Action Plans on strategies for social protection and social inclusion; the use of the Structural Funds; the follow-up to the Copenhagen declaration in the field of VET; and awareness raising activities.

were at very different stages in terms of planning and implementation. The discussions revealed that the process of preparing strategies was leading to increased cooperation between relevant Ministries, regions, local authorities, social partners and civil society and several countries were making legislative changes to adjust their systems. There was a general acceptance by most if not all participating countries that lifelong learning should be viewed as an overarching concept covering all systems (formal, non-formal) and levels (pre-school, primary, secondary, higher, adult, continuing) of education and training.

The ETCG since 2005 has brought together the various strands of E&T 2010, including both general education and VET within a lifelong learning perspective. National delegations have been reminded of their responsibility for the day-to-day national coordination of the process: which should include providing national representatives on Clusters with adequate time and support to fulfil their tasks; networks to disseminate information from Clusters within relevant ministries and to stakeholders are also essential.

#### *7.1.3 Raising the visibility of the process and the participation of stakeholders*

In order to support countries' efforts to put in place coherent and comprehensive lifelong learning strategies by the end of 2006, the Commission provided financial support in 2007 for awareness raising activities. Funding was made available through a restricted call for proposals to national education authorities<sup>83</sup>. The purpose of the call was to promote the establishment and/or implementation of lifelong learning strategies in each country and, indirectly, to raise the profile of lifelong learning and to enhance the impact of the Education and Training 2010 work programme. The call focused on activities supporting national debates and dialogue (such as national or regional conferences, seminars or workshops) and awareness-raising and dissemination activities (e.g. information activities, including media campaigns, publicity events, etc.).

#### *7.1.4 Monitoring and evaluating the implementation of the work programme (indicators as benchmarks)*

The monitoring of progress in implementing the E&T 2010 is supported by an annual analytical report, which charts progress towards Europe's targets in the area of education and training using a framework of indicators and benchmarks, and puts performance, where useful and possible, into a global perspective. The analysis gives an indication of the direction European education systems are moving in and of how they are contributing to Europe's potential to fulfil the objectives set at Lisbon<sup>84</sup>.

On 25 May 2007 the Education Council adopted conclusions on a coherent framework of indicators for monitoring progress towards the Lisbon objectives in education and

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<sup>83</sup> The restricted call formed part of the implementation of the Decision 791/2004/EC of the European Parliament and the Council – Action 3B: 'Support for activities contributing to the achievement of the future objectives of the education and training systems in Europe'.

<sup>84</sup> Progress towards the Lisbon Objectives in Education and Training - Indicators and benchmarks 2007 SEC (2007) 1284 of 2.10.2007.

training. The Council invited the Commission to make use of, or further develop, sixteen core indicators thereby ensuring their political legitimacy for the identification of strengths and weaknesses with a view to providing strategic guidance to the Education and Training 2010 work programme.

A research unit on lifelong learning (CRELL), which has been set up at the Joint Research Centre at ISPRA, assists the Commission in the work on measuring progress and performance and in developing new indicators. The research unit became fully operational at the end of 2006.

## **7.2. The state of play in relation to the priority areas of the work programme**

The following paragraphs offer a brief overview of the concrete outcomes at European level in 2004-2005 including progress on lifelong learning policies, the outcomes of the clusters and peer learning activities as well as progress on other activities under higher education, vocational education and training and adult education.

### *7.2.1 Progress on lifelong learning policies*

The European Council called in March 2005 for the further development of the European Education and Training area, particularly in order to promote occupational and geographic mobility. The development of tools and common references for education and training is essential to support the achievement of this priority. Such common references contribute to developing mutual trust between the key players and encouraging reform.

Substantial progress has been made particularly in the follow-up to the 2002 Copenhagen Declaration, to develop tools which are applicable beyond vocational education and training and have a broad lifelong learning focus – relevant to all levels and dimensions of learning. The following paragraphs offer a brief overview of the concrete outcomes at European level including the European Qualifications Framework (EQF), lifelong guidance and validation of non-formal and informal learning and mobility.

#### **(i) European Qualifications Framework**

A key objective is the development and implementation of a European Qualifications Framework for lifelong learning (EQF) and rapid progress has been made since 2006. The objective of the EQF is to create a common reference framework which should serve as a translation device between different qualifications systems and their levels, including general education, higher education and vocational education and training. This will increase the transparency, comparability and portability of citizens' qualifications and as such contribute to promoting lifelong learning and increasing the mobility of workers and learners between countries as well as that between different systems of education and training.

Based on an extensive EU-wide consultation of experts and stakeholders and building upon work carried out both in the context of the Copenhagen process for vocational education and training and the Bologna process for higher education, the Commission put forward a formal proposal for a Recommendation establishing the EQF in September

2006<sup>85</sup>. The Education Council agreed on a general approach at its meeting 13-14 November 2006. The proposal is currently being considered by the European Parliament.

To prepare for the implementation of the EQF, the Commission launched specific calls for proposals under the Leonardo da Vinci Programme in 2006 and 2007. 12 projects were selected in 2006 to test and develop the EQF, each involving partners from at least 5 countries representing ministries, sectors, social partners, education associations and other stakeholders.

The Commission has also established an implementation preparatory group composed of experts from the countries participating in the E&T 2010 and the European social partners. The aim of the group is to ensure coherence of the development and implementation of the EQF, which is already underway in many countries, for example by working on the development of guidance and other information material. The Group will make best use of the results produced by the clusters under the E&T 2010 (e.g. on recognition of learning outcomes) and the selected projects funded by the Leonardo da Vinci programme as referred to above.

The EQF proposal has acted as a catalyst for reform of national qualifications systems. An increasing number of countries are currently implementing or considering the implementation of National Qualifications Frameworks (NQF). While these NQFs take various forms in different countries, they generally aim to establish national standards for learning outcomes and to improve the permeability of the qualifications system. The majority of countries taking part in the Education and training 2010 process see the development of NQFs as a prerequisite for referring their qualifications levels to the EQF.

#### (ii) Lifelong guidance

Large gaps continue to exist between the policy goals identified in the Council Resolution on Lifelong Guidance of May 2004<sup>86</sup> and the real capacity of national career guidance systems. Following the conference on lifelong guidance organised by the Finnish Presidency in Jyväskylä in November 2006, representatives of Member States and other countries participating in the Lifelong Learning Programme met in Helsinki on 7-8 May 2007. They agreed in principle to establish a network to implement the principles of the Council Resolution.

Twenty-three countries were represented at the Helsinki meeting by representatives of education or labour ministries or both. All indicated their support for the establishment of the network and their interest in participating either as full members or, in an initial phase, as observers. Several countries not present have also indicated their interest in participating. Several European stakeholder groups were also represented and supported the process.

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<sup>85</sup> COM (2006) 479 final of 5 September 2006.

<sup>86</sup> 9286/04 EDUC 109 SOC 234.

[http://europa.eu.int:8082/comm/education/policies/2010/doc/resolution2004\\_en.pdf](http://europa.eu.int:8082/comm/education/policies/2010/doc/resolution2004_en.pdf)

During an initial phase of two or three years the network will develop its approach and working methods and help to strengthen representative structures at national level, while supporting lifelong guidance policy development and implementation. In the latter tasks it will use as its references the principles of the Council Resolution, the template for action devised by the Commission's expert group to support Member States, and the Career guidance handbook for policy makers jointly published by the OECD and the Commission in December 2004<sup>87</sup>. Cedefop and the ETF have indicated their willingness to cooperate with the network on technical and scientific matters.

(iii) Validation of non-formal and informal learning

Validation of non-formal and informal learning is on the agenda of almost all European countries and is seen as a key-factor for realising lifelong learning. A number of European initiatives have been taken to support developments at national level (see also point 7.4.2). A set of common European principles for identification and validation of non-formal and informal learning were endorsed by Council Conclusions in May 2004<sup>88</sup>. These principles focus on individuals entitlements to validation, the participation of stakeholders, the need for transparent procedures and criteria and the importance of systematic quality assurance. Acknowledging that validation has come to play an important role in enterprises and sectors, the Council invited social partners to contribute and to take an active part in the further development of these principles. In 2007a European inventory (guidelines) for identification and validation of non-formal and informal learning is being developed. These guidelines will be based on the extensive experiences made in this field in recent years and can be seen as a technical specification of the 2004 Common Principles. The guidelines, to be presented as a handbook for practitioners, will be used on a voluntary bases and will also provide a platform for continued European cooperation in 2008 and.

The launching of the European Qualifications Framework (EQF), and the rapid development of National Qualifications Frameworks (NQFs), has led to an increased attention to validation of non-formal and informal learning. Some countries which are lacking validation systems have started work in this field in relation to the setting up of a NQF. Both the Council and the European Parliament has emphasised the important role to be played by validation in terms of opening up national qualifications systems and frameworks to the learning taking place outside formal education and training.

A European Inventory on validation of non-formal and informal learning has been set up to support the implementation of the common principles and to promote mutual learning between European countries. This inventory covers the experience of 30 countries, a wide range of industry and service sectors as well as a variety of voluntary organisations. This inventory is available via the EAC web-site (as well as the web site of Cedefop and ECOTEC). In addition to this, the Virtual community of Cedefop on non-formal learning has proved to be instrumental in the development of the common principles and in

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<sup>87</sup><http://www.oecd.org/dataoecd/53/53/34060761.pdf>.

<sup>88</sup>9175/04 EDUC 101 SOC 220.

[http://europa.eu.int/comm/education/policies/2010/doc/validation2004\\_en.pdf](http://europa.eu.int/comm/education/policies/2010/doc/validation2004_en.pdf).

supporting the compilation of the Inventory. This Virtual Community has now close to 1000 active members, thus providing a strong basis for cooperation among experts in this particular field.

The common principles (including the technical guidelines referred to above), the Inventory and the Virtual Community will provide the basis for peer learning activities in 2008.

#### (iv) Mobility

On the 18th December 2006 the Education Council adopted a European Quality Charter for Mobility<sup>89</sup>. Focusing on the quality aspects of mobility, the Charter constitutes a reference document for stays abroad in order to ensure that participants have a positive experience. Its scope covers stays by young people and adults for the purposes of both formal and non-formal learning and hence for their personal and professional development. It offers guidance designed to respond to participants' expectations and the legitimate requirements of education bodies and institutions. The Charter thus provides a better framework for free movement of persons for educational purposes, so as to consolidate the creation of a true European area of education and training. A study on the socio-economic impact of mobility is currently in preparation by DG Education and Culture.

#### *7.2.2 Outcomes of the clusters and peer learning activities*

The work of the clusters is still at an early stage and the methodology of each is being adapted as the work develops, particularly with regards to the organisation of peer learning activities.

The clusters employed a range of different working methods. For instance all the clusters used peer learning activities as part of their working methods and nearly all employed an exchange of good policy practice.

Other working methods included very specific activities such as those on collaborative learning environments and digital content production and use in the cluster on ICT.

The work of the clusters showed that the success of peer learning activities strongly depends on the following factors: (a) participation of relevant senior policy makers and practitioners; (b) substantial preparation by all participants (including participation in planning meetings and drafting of well-structured national reports on the specific topic in advance); (c) a well balanced programme over 3-4 days which allows sufficient time for reflection and discussion on the topic; and (d) effective moderation of the discussions to ensure a joint effort for developing useful policy recommendations. Factor (a) has sometimes been difficult to achieve; factors (b)-(d) have required constant efforts and devotion by all involved.

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<sup>89</sup> Recommendation of the European Parliament and of the Council on Transnational mobility within the Community for education and training purposes - European Quality Charter for Mobility (EC 2006/961): [http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l\\_394/l\\_39420061230en00050009.pdf](http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l_394/l_39420061230en00050009.pdf).



Several participants in clusters have identified that they lack the position, or the networks, or the time, to ensure effective use of their cluster's policy conclusions in policy making in their home countries. The impact of peer learning activities is greatest on the individuals who participate in them, but these are not always the people who are involved in making policy decisions.

The impact of the outcomes of the clusters on national policy development and policy implementation needs to be strengthened, the exchange of best practices should concentrate more on policies which have been properly evaluated (evidence-based) and clusters would need to intensify the dissemination of their outcomes.

(i) Cluster on teachers and trainers

As regards methods of work the cluster on teachers and trainers has attained a shared understanding of its role and the challenges that poses for its members. The main impact of the Cluster's work is the raised awareness about and the dissemination of, good policy practice within the ministries of most participating countries and, in a few cases, within some teacher education institutions and some social partner organisations.

As regards policy on teachers and trainers, it has successfully identified key policy conditions for; (a) the successful development of a school as a learning community; (b) the recruitment and development of school leaders; and (c) the establishment of effective partnerships between schools and companies and (d) the preparation of teachers to teach effectively in culturally diverse settings.

The Cluster has begun its consideration of good practice in the education, recruitment, and retention of school leaders with a policy seminar on this issue. Taken together, these constitute what the Cluster considers to be the priority areas for action.

In the next 18 months, the Cluster will prepare a summary report to help disseminate information about its activities, further develop work on the quality of teacher education and undertake additional peer learning activities on themes such as effective relationships between schools and teacher education providers; school leadership; motivating teachers and trainers to undertake continuing professional development, and developing the initial teacher education curriculum. It is also anticipated that the Cluster will turn its attention to the Commission's Communication on Improving the Quality of Teacher Education.

The Cluster is developing links with other Clusters such as Maths, Science and Technology and Key Competences. (See also section 4.5. and 4.8.)

(ii) Cluster on making best use of resources

The cluster on making best use of resources is responsible for the follow-up to the Commission Communication<sup>90</sup> and Council Conclusions<sup>91</sup> on Efficiency and Equity. Within this overall mandate, it has particularly focused on the preparation of exchanges of best practices in the field of evidence-based policy and practice.

The cluster has organised two peer learning activities on higher education. The first peer learning activity on tuition fees and accompanying financial measures held in **Portugal** fed directly into the aforementioned Commission Communication on Efficiency and Equity. The second peer learning activity on university governance: autonomy and accountability held in **Denmark** fed directly into the 2006 Commission Communication on Higher Education<sup>92</sup>. (See also section 5.1)

Peer learning activities in 2007 will address evidence-based policy and practice in education and training in the **Netherlands** and on efficiency and equity in pre-primary education in **Belgium**. In 2008, the cluster will concentrate its work on evidence-based policy and practice as a key element in the implementation of coherent and comprehensive national lifelong learning strategies in line with the Education and Training 2010 work programme.

(iii) Cluster on maths, science and technology

Among the priorities of the cluster on maths, science and technology (MST) are the modernisation of teaching methods; enhancement of the professional profile of teachers; ensuring a better transition between secondary and higher education; promoting partnerships between schools, universities and industry; addressing the needs of special groups and improving female participation in MST studies and careers.

The main results of the cluster activities are exchange of good practices in the field of MST. Peer learning activities were organised in the **Netherlands** focusing on the comprehensive national reform « Delta Plan in S&T ». These activities highlighted the need to develop clear MST strategies in a lifelong learning perspective and to integrate the follow-up to the European MST benchmark in national policies. Following this PLA positive impacts at national level and a clear demand for dissemination of good practices have been reported by cluster participants.

The cluster contributed to a conference on "Gender Issues in Research" organised by the German EU-presidency in the first half of 2007. The cluster supported the work of the High Level Group on Science Education chaired by Michel Rocard. Synergies were

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<sup>90</sup> COM (2006) 481 of 8.9.2006.

<sup>91</sup> Efficiency and equity in European education and training systems: Conclusions of the Council and the Representatives of the Governments of the Member States, meeting within the Council:  
[http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/c\\_298/c\\_29820061208en00030006.pdf](http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/c_298/c_29820061208en00030006.pdf)

<sup>92</sup> Delivering on the modernisation agenda for universities: education, research, COM (2006) 208 final, of 10 May 2006.

ensured with OECD's 2006 policy report 'Student Interest in S&T' and with Eurydice's 2006 survey 'Science Teaching in Schools in Europe'.

Peer learning activities in 2007 will address national action plans aiming at increasing the interest in maths at all levels of education.

(iv) Cluster on access and social inclusion in lifelong learning

Given the broad scope of the cluster on access and social inclusion in lifelong learning the participants chose to focus their initial work on early school leaving and educational issues for pupils with an immigrant background.

The cluster has organised peer learning activities in **Belgium** (French Community) on positive discrimination policies and on school integration of immigrant pupils; in **Ireland** on preventative and compensatory measures against early school leaving; and in **Hungary** on school desegregation. These activities were complemented and followed-up by four meetings with participation of specially invited academic experts. They have: highlighted the need for coherent and comprehensive national inclusion approaches involving all relevant actors; ensuring well functioning education institutions; improving the attractiveness of teaching in disadvantaged environments; creating synergies between families and education institutions and developing extra-curricular activities focused on personal development, sport and art. (See also section 4.8)

The main impact of the clusters work has been to inform national policy development and policy implementation. The first discussions have thus been a source of inspiration for all participants. The outcomes of the activities have been disseminated to decision makers and practitioners and a number of participating countries have organised follow-up seminars and conferences involving national stakeholders. The peer learning activities have also promoted cooperation between participating countries.

Until the beginning of 2008, the cluster will keep its focus on combating early school leaving. Peer learning activities on this subject will take place in **France** in October 2007. The main lessons learnt on early school leaving will be summarised in a report which will be presented and disseminated. Meanwhile, the Cluster will keep addressing the issue of education and migration, and its work will feed into the preparation of a Communication on the subject in early 2008. In the course of 2008 the cluster will eventually focus on adult learning and on pre-school education.

(v) Cluster on key competences

The cluster on key competences follows up the recommendation on key competences for lifelong learning which was adopted by the Education Council on 14 November 2006<sup>93</sup>. It looks into policies that in particular support the cross-curricular competences and literacy, both amongst young and adult learners.

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<sup>93</sup> Recommendation of the European Parliament and of the Council on key competences for lifelong learning (2006/962/EC):  
[http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l\\_394/l\\_39420061230en00100018.pdf](http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l_394/l_39420061230en00100018.pdf)

The cluster organised its first peer learning activities in January 2007 in Belgium (Flemish Community). It was focussed on how "learning to learn" competences can be supported by inspection, utilising research and developing a school ethos where teachers support each students learning. It also dealt with how teachers' initial education promotes new ways of learning amongst teacher students.

The final report from the peer learning activities provides insights into the system of Flanders and makes comparisons with the systems of other participating countries. This has provided the participants with ideas which they can bring forward and adapt to their own national situations in order to stimulate policy development and policy implementation.

In the next 18 months the cluster will organise three additional peer learning activities and the outcomes of these will be synthesised in a summary report that will suggest key policy messages on the implementation of key competences.

In the near future, closer links with the cluster on teachers and trainers will be ensured.

#### (vi) Cluster on ICT

The major strategic objective of the cluster on ICT is to identify key factors for improving the quality of ICT integration in teaching and learning in European education systems. The main results of the cluster activities are exchange of good practices and the identification of key recommendations on the implementation and integration of ICT in education. Peer learning activities have been organised in **Norway, Finland, Luxembourg and Hungary**. These activities have highlighted the need to invest in infrastructure, to adapt equipment levels to constraints and challenges faced by schools, to plan renewal of hardware in the medium term and to invest in the production of content, learning objects repositories and learning management systems with significant input from teachers and learners. A critical review of studies led to the formulation of general recommendations regarding ICT policies at school level and future research and development needs. The cluster has also contributed to the drafting of the Commission Report on the use of ICT to support innovation and lifelong learning for all, which should be published in the third quarter of 2007.

The main impact of the clusters work at European level concerns the development of an assessment culture for ICT implementation and integration, the creation of a platform for exchange of best practice allowing critical analysis of national initiatives and providing a self reflective mechanism. At national level the main impact has been to inform policy development and policy implementation. The outcomes of the activities have been disseminated to decision makers and practitioners and an impact report has been issued<sup>94</sup>. The peer learning activities have also promoted cooperation between participating countries.

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<sup>94</sup> "The ICT Impact Report - A review of studies of ICT impact on schools in Europe"  
<http://ec.europa.eu/education/doc/reports/doc/ictimpact.pdf>.

In the next 18 months the cluster will address topics such as training and support, social networks and lifelong learning, distance learning, ICT tools and architecture, corporate links and European cooperation and research. The cluster will also seek to link the activities to activities of other clusters for example on teachers and trainers, access and social inclusion in lifelong learning and maths, sciences and technology. The cluster will follow a broad approach aiming at stimulating changes in areas such as school organisation, curricula development, teachers training and infrastructure and support services. It is also envisaged to develop a compendium of best practices identified by cluster members.

(vii) Cluster on recognition of learning outcomes

The cluster on recognition of learning outcomes is responsible for taking forward a broad range of issues related to the shift to a learning outcomes perspective in education and training policies and practices. A key question pursued by the cluster is whether this shift can be used to promote access, transfer and progression in education and training, facilitating lifelong learning?

Two broad questions have been pursued by the cluster: 1) How can European cooperation support validation of non-formal and informal learning at national, regional and local level, and how can the existing (since 2004) Common European principles on validation be further developed? 2) How can the development and implementation of National Qualifications Frameworks; how can these frameworks facilitate the link between national qualifications levels and the EQF; how can they reduce barriers to lifelong learning within national systems?

This approach reflects an agreement that a knowledge-based society and economy needs to make better use of existing knowledge, skills and competences, including those acquired outside formal education and training systems, for example at work, or in voluntary or leisure activities. Realising lifelong learning requires that different learning contexts and settings are linked together, facilitating transfer and accumulation of learning outcomes. The establishment of the cluster is therefore a reflection of a developing shift in many European countries away from a focus on learning inputs towards a learning outcomes approach. The work of the cluster is closely linked to the development of the European Qualifications Framework (see section 7.2.1. (i)) in particular through the focus on National Qualifications.

Three peer learning activities have taken place: a) was held in Belgium in January 2007 addressing validation of non-formal and informal learning. Taking existing national practises as its starting point, the peer learning activity examined how Quality Assurance in the field of validation can be taken forward and suggested the development of a set of European guidelines to support implementation of the 2004 Common Principles. b) was held in France in July 2007 using the **French** and **Italian** experiences in the field of validation as starting point. The work on the European guidelines continued their format and content being refined. c) will take place in Hungary in September 2007 where **Hungary** will share its experiences in the development of National Qualifications Frameworks. The activity will assist the participating countries in understanding learning outcomes-based NQFs and in exchanging views on how they can best be designed and

implemented. This work will be closely coordinated with the EQF Implementation group which started its work in March 2007; it will also be linked to the Leonardo da Vinci funded testing of the EQF which started in January 2007.

The three PLAs organised during 2007 have been very helpful in identifying issues relevant for the implementation of EU initiatives at national level. The PLAs have also uncovered a number of new issues and questions which need to be addressed in 2008 and beyond.

A comparative study on the shift to a learning outcomes based approach was initiated by Cedefop in January 2007. This project is being taken forward in close cooperation with the cluster and has already provided important input to the work (see also section 7.2.2. (iix)).

(iix) Cluster on modernisation of higher education

The Cluster on Modernisation of Higher Education is responsible for supporting the reform agenda for higher education. Following the Commission Communication on Delivering on the Modernisation Agenda for Universities, education, research and innovation this Cluster looks in detail to issues related to curriculum, governance and funding reform. Based on the learning needs of participating countries, the Cluster looks at key issues and organises specific events for the exchange of good practice and reflection on experiences.

The Cluster has organised three peer learning activities: (a) in October 2006 on the joint implementation of curriculum and funding reforms in **Norway**, which underlined the need for comprehensive reforms to achieve the best results; (b) in October 2006 on partnerships between universities and business in the **UK**, which focussed on conditions for structural and sustainable partnerships; and (c) in March 2007 on government steering of autonomous institutions in the **Netherlands**, exploring financial instruments for system performance to be developed in line with national priorities.

In October 2007 in **Bulgaria** the cluster will organise a peer learning activity on the implementation of the National Qualifications Framework (NQF)/ European Qualifications Framework (EQF) in higher education. By the end of 2007 the Cluster is finishing work for the preparation of a compendium of good practice in policymaking for modernising universities. The compendium should be an information tool at the web aiming at informing national and regional policy development and policy implementation. It will be based on good practices provided from the Member States, with evidence on results where available.

The direct impact of the work of the Cluster is difficult to assess after only one year of activities. However, participating countries have indicated their strong interest in the themes that are addressed within this Cluster and their relevance to national policy making. (See also section 5.1 and 5.8)

### *7.2.3 Progress on higher education in the Lisbon strategy*

The higher education strand of the Education and Training 2010 work programme is in particular related to the targets that the European education and training systems should have by 2010, which are to become a “world quality reference” and “the preferred destination of students, scholars and researchers from other world regions”.

The European Commission aims to support Member States in their efforts to modernise higher education systems, in all areas of their activity - education, research and innovation - making them more coherent, more flexible, and more responsive to the needs of society. Modernisation is needed in order to face the challenges of globalisation and to develop the skills and capacity of the European workforce to be innovative. They should enable universities to play their role in the Europe of Knowledge and to make a strong contribution to the Lisbon Strategy for Growth and Jobs.

Governments should give institutions more autonomy. Universities should modernise the content of their curricula, create virtual campuses, reform their governance and professionalize their management of human resources, investment and administrative procedures, diversify their funding and open up to new types of learners, business and society at large. In May 2006, the Commission published a Communication<sup>95</sup> pointing to nine areas where action would help deliver the modernisation agenda for universities in education, research and innovation<sup>96</sup>.

The Communication was written at the request of the informal European Council meeting at Hampton Court (UK) and fully endorsed at the June 2006 formal meeting in Brussels. The recently adopted Commission Green Paper re-launching the European Research Area<sup>97</sup> has also made the broad modernisation agenda for universities a key element in achieving the goals of the European Research Area.

Part of the Commission's reform agenda for higher education is the focus on excellence which should be encouraged at all levels. To strengthen the competition for excellence the

Commission has proposed to set up a European Institute of Technology. After discussions with the Member States and the European Parliament the regulations for the EIT are expected to be adopted by the Council and the European Parliament by the end of 2007.

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<sup>95</sup> “Delivering on the Modernisation Agenda for Universities” Education, Research and Innovation COM(2006)208 final, of 10 May 2006:

[http://ec.europa.eu/education/policies/2010/doc/comuniv2006\\_en.pdf](http://ec.europa.eu/education/policies/2010/doc/comuniv2006_en.pdf)

<sup>96</sup> The nine areas are: 1) Break down the barriers around universities in Europe; 2) Ensure real autonomy and accountability for universities; 3) Provide incentives for structured partnerships with the business community; 4) Provide the right skills and competencies for the labour market; 5) Reduce the funding gap and make funding work more effectively in education and research; 6) Enhance inter-disciplinarity and trans-disciplinarity; 7) Activate knowledge through interaction with society; 8) Reward excellence at the highest level and 9) Make the European Higher Education Area and the European Research Area more visible and attractive in the world.

<sup>97</sup> “The European Research Area: New Perspectives”, COM(2007) 161 final of 4.4.2007

The Commission works with Member States and the higher education sector to help implement the modernisation agenda through what is called the Open Method of Coordination (involving dialogue among clusters of policy makers and experts, peer-learning activities, indicators, benchmarks, reports and analyses), by taking special initiatives (Quality Assurance, ECTS, EQF, EIT etc.) and by supporting the initiatives of others (pilot projects, associations, networks etc.) through the Lifelong Learning Programme. The Commission also works to support this modernisation agenda through the implementation of the Community Lisbon Programme, the 7th EU Framework Programme for Research and the Competitiveness and Innovation Programme, as well as the Cohesion Policy programmes and EIB loans.

#### *7.2.4 Higher education and the Bologna Process*

The Bologna process coincides largely with EU policy in higher education. The Commission therefore stimulates Bologna initiatives at European level and participates as a full member in the Bologna Follow-up Group. From an EU-perspective, there is also an obvious link between the Bologna process and the Copenhagen process on Vocational Education and Training (in fields such as Europass, Credit transfer for VET, Quality Assurance for VET and the European Qualifications Framework).

The EQF takes account of the development of the qualifications framework for Higher Education developed under the Bologna Process. Specifically, the EQF descriptors at levels 5-8 refer to the higher education descriptors agreed under the Bologna Process. EQF level 5 corresponds to the descriptor developed for the higher education short cycle, EQF level 6 to the descriptor developed for the first cycle (Bachelor level), EQF level 7 to the descriptor developed for the second cycle (Masters level) and EQF level 8 to the descriptor developed for the third cycle (PhD level). However, the formulation of the EQF level descriptors differs from the Bologna level descriptors developed specifically for higher education needs because the EQF also encompasses vocational education and training (VET) and work contexts, including at the highest levels. This approach – which is vital if the EQF is to be a truly lifelong learning framework – was agreed by stakeholders at the Budapest conference on the EQF in February 2006.

The Bologna Declaration of June 1999 has put in motion a series of reforms needed to make European Higher Education more compatible and comparable, more competitive and more attractive for Europe's citizens and for citizens and scholars from other continents. Reform was needed then and reform is still needed today if Europe is to match the performance of the best performing systems in the world, notably the United States and Asia.

The Bologna Process should be seen in the context of broader initiatives to support the creation of a Europe of knowledge. To establish synergies between the Copenhagen and Bologna processes, the Commission has brought forward its proposal for a European Qualifications Framework for lifelong learning (EQF). This is linked to and supported by other initiatives in the fields of transparency of qualifications (EUROPASS), credit transfer (ECTS-ECVET) and quality assurance (ENQA-ENQAVET).



Of similar importance is the link between the European Higher Education Area and the European Research Area (EHEA and ERA), which is embedded in the current round of the Bologna Process, inter alia through the attention given to doctoral level activities.

The Bologna Follow-up Conference in London in May 2007 adopted two new tools, a strategy for the external dimension of the Bologna Process and the European Register for Quality Assurance Agencies.

#### i) External dimension strategy

The external dimension strategy is a response to the growing need to ensure the visibility and openness of European higher education in the world, both vis-à-vis neighbouring countries and other continents. The proposed external dimension strategy comprises a set of principles and activities in the fields of information, promotion, partnerships, recognition of qualifications<sup>98</sup> and policy dialogue.

The European Commission supports the external dimension strategy through its policies and programmes. Of special importance in this context is the EU's flagship programme for worldwide academic cooperation, Erasmus Mundus. In July 2007 the European Commission adopted a proposal to launch the new generation of the Erasmus Mundus programme for the period 2009-13. The new Erasmus Mundus II programme builds the success of its predecessor by aiming to become the EU reference programme for cooperation with third countries in this area. Over a period of five years, just over 950 million euros will be available for European and third-country universities to join forces in joint programmes or collaborative partnerships, and to grant scholarships to European and third-country students for an international study experience.

In addition to Erasmus Mundus highly integrated European Masters Courses and competitive scholarships are making a powerful contribution to improving the attractiveness of “destination Europe”. By the end of the programme’s first phase in 2008, 100 courses and 10,000 scholarship-holders will have received EU support.

#### ii) The European Register of Quality Assurance Agencies

The joint recommendation of the European Parliament and Council on further European cooperation in quality assurance in higher education had called for the establishment of a Register for quality assurance agencies<sup>99</sup>. After having been formally adopted in London the Register will now be launched in the second half of 2007. The register will assist in furthering the development of the European Higher Education Area by providing clear and reliable information about trustworthy quality assurance agencies operating in Europe. The Register will help to raise the visibility of European higher education and boost confidence in institutions and programmes within Europe and worldwide. It will

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<sup>98</sup> This refers to the first recognition of a third country qualification in a Member State. The second recognition is regulated under Directive 2005/36/EC.

<sup>99</sup> Further European cooperation in quality assurance in higher education *Recommendation of the European Parliament and of the Council* (February 2006):  
[http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l\\_064/l\\_06420060304en00600062.pdf](http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l_064/l_06420060304en00600062.pdf)

list both national quality assurance agencies (ENQA members) and agencies operating at a European or global scale. The Register will provide a basis for governments to authorise higher education institutions to choose any agency from the Register where that is compatible with national arrangements.

The Register has been prepared by ENQA and stakeholders from the higher education sector (EUA, EURASHE and ESIB), with the support of the European Commission. The Commission is planning to provide start-up funding in 2007 and 2008.

(ii) Next steps and future issues

The Commission works with Member States, experts and stakeholders in monitoring progress in modernising higher education. Thus it is working with the Portuguese Presidency of the Council to organise a conference in the autumn which will examine the state of play of reforms, exchange experiences and assess the degree to which reforms have reached grassroots level, institutions, researchers, teaching staff and students.

Material to contribute to such reviews of progress will be provided through Eurydice<sup>100</sup>, Eurostat and specially commissioned studies. The monitoring of higher education reforms over longer periods of time will be underpinned by the use of the coherent framework of indicators and benchmarks.

The issue of the legal status and working conditions of doctoral candidates and young researchers needs to be addressed. Future work in this area could be based on the principles set out in the Commission Recommendation on the European Charter for Researchers and on a Code of Conduct for the Recruitment of Researchers.

Furthermore, legal, administrative and financial disincentives to mobility in such fields as migration and visa policies (in line with EU visa directives), complementary pension rights and social security need to be addressed. Data gathering on the mobility of students, researchers and teaching staff needs to be improved.

*7.2.5 Progress in implementing the Copenhagen process for vocational education and training*

(i) The Helsinki Communiqué

The second biennial review of the Copenhagen process took place in Helsinki at an informal ministerial meeting on 5 December 2006, at which ministers from the EU Member States, candidate and EEA countries, the European Social partners, and the Commission agreed a Communiqué which sets out the priorities of the process for 2006-2008. The results of an enquiry carried out by the Finnish presidency among participating countries and social partners, in preparing the Communiqué, show that they view the process very positively. At a political level, its priorities are in line with national

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<sup>100</sup> 2007 Eurydice Focus on Structures in Higher Education, 2007 Eurydice Key data and Eurydice Survey On governance and funding.

developments and it has helped highlight the importance of the VET sector and improved its visibility.

Therefore, the Helsinki Communiqué<sup>101</sup> continues and reinforces the Copenhagen process, especially the priorities and tools for enhancing the quality, transparency and recognition of competences and qualifications<sup>102</sup>, which are being developed together since November 2002. Also the Communiqué calls for the exchange of information, expertise and results with third countries, particularly those countries covered by the enlargement policy and by the wider Europe neighbourhood policy.

The Communiqué highlights four priority areas:

- At a policy level, participating countries agree that more attention should be paid to the image, status and attractiveness of VET. In improving its attractiveness and quality, more emphasis will be placed on good governance of VET systems and providers in delivering the VET agenda.
- The development of common European tools should be continued in order to pave the way towards a European area of VET and to support the competitiveness of the European labour market. The aim is for the agreed tools to be in place by 2010.
- A more systematic approach to strengthen mutual learning, cooperation and sharing of experience and know-how. This can be supported by consistent, comparable data and indicators, which are the key to understanding what is happening in VET, to supporting research and to laying the foundations for evidence-based training policy.
- Taking all stakeholders on board and enabling their contribution and active participation in all stages. Particular emphasis is placed on involving VET providers, teachers and trainers in testing and implementing the outcomes of the process.

#### (ii) Progress on the Copenhagen priorities

Member States are actively engaged in addressing the national priorities defined in the Maastricht Communiqué. The progress report prepared by Cedefop for the Helsinki ministerial, on the basis of feedback from the Directors General for Vocational Training, shows that the shared European VET policy agenda is influencing reforms and developments at national level. The European Qualification Framework is setting the trend for developing National Qualifications Frameworks (NQF) to improve transparency, permeability, access and progression and promote parity of esteem between VET and general/academic education (see section 7.2.1. (i)). Several countries are working on the improved quality assurance, also necessary for the EQF and NQF, and recommend the application the Common Quality Assurance Framework (CQAF). A shift to learning outcomes has commenced, with knock-on effects emerging in the design of

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<sup>101</sup> [http://ec.europa.eu/education/policies/2010/doc/helsinki\\_en.pdf](http://ec.europa.eu/education/policies/2010/doc/helsinki_en.pdf).

The Communiqué is on the Council Conclusions on the future priorities for enhanced cooperation in VET, 14 November 2006, Doc 14474/06.

<sup>102</sup> See footnote 65.

curricula and flexibility of systems, including a re-assessment of schemes combining work and training. Other areas where progress was noted were: validation of non-formal and informal learning, improved guidance and counselling services, improved efficiency of investment and attention to equity and access.

Cedefop is supporting their efforts by organising study visits, peer learning and workshops, many of which take place within the framework of the Community Study Visit Programme. ETF is raising awareness of European policy priorities among neighbouring countries engaged in reforming their VET systems. Steps are being taken to raise stakeholders' awareness of the process and to widen the group of actors (especially sectors, training providers and establishments) involved in its implementation and follow up, particularly through the Leonardo da Vinci programme.

### (iii) European credit transfer system for VET

A European credit system for vocational education and training (ECVET), to allow trainees to build upon their achievements when moving within national systems or from one national VET system to another, is now in its final phase of development. This tool is based on learning outcomes and therefore in compliance with the principles of the European Qualifications Framework (see section 7.2.1. (i)). ECVET will facilitate the accumulation, exchange and transfer of learning credits in any context, thus enabling citizens to pursue lifelong learning. It is therefore also an important element supporting the success of EQF..

The Commission launched a public consultation on the ECVET proposal at European level which concerned all the European countries involved in the Copenhagen process, the European social partners and professional organisations. This consultation took place between November 2006 and March 2007 with the aim of inviting all the players and experts to give their opinion on what the objectives, principles and technical characteristics of the ECVET system could or should be. The results of the consultation were discussed at a major European conference held in June 2007 under the German Presidency. In parallel, the Commission carried out two studies on the implementation of ECVET, from the point of view of the qualifications systems and of the VET provision systems. The results of the consultation and the conclusions of the studies are now used to prepare a draft recommendation on an ECVET system. For this purpose the Commission has established a technical working group composed of experts from the countries participating in the E&T 2010 and the European social partners, education associations and other stakeholders.

To the experiment ECVET, the Commission launched a specific call for proposals under the Leonardo da Vinci Programme in 2006. Five projects were selected in 2006 to test and develop ECVET, each involving partners from at least five countries representing ministries, sectors, social partners, education associations and other stakeholders.

### (iv) Quality Assurance in VET: European Framework and Cooperation platform

A Common Quality Assurance Framework for VET (CQAF) was endorsed by the Council in May 2004. The framework provides a common reference system for

continuous quality improvement of VET provision and helps to develop, improve, monitor and evaluate national systems and practices across countries. The Helsinki Communiqué underlined the need to promote a culture of quality improvement and wider participation in the European Quality Assurance Network for VET namely by drawing on the principles underlying a Common Quality Assurance Framework, as referred to in the May 2004 Council Conclusions on quality assurance in VET<sup>103</sup>.

The CQAF has been a basis for mutual learning and the launch of several concrete initiatives, at both national and European levels<sup>104</sup>. At National level, it has been used in several countries to support policy debate and guidelines, in some cases to support the reform of VET systems, and more frequently, the launching of pilot projects (in particular on self-assessment of training providers) and information/dissemination initiatives. At European level, the CQAF has been supporting thematic work (quality indicators, early warning systems and links with Higher Education and EQF) and peer learning activities<sup>105</sup>, as part of the implementation of the biannual work programme of the European Network on Quality Assurance in VET.

This European platform, involving competent bodies on quality assurance and improvement in VET designated by Member States, candidate countries, EFTA-EEA countries and the European Social Partners organisations, provides a structured mechanism for sustainable cooperation on quality assurance and development, at system and provider levels, and therefore a means to further implementation of the Council conclusions and Resolutions<sup>106</sup>, and the Helsinki Communiqué, thereby enabling progress towards the Barcelona European Council target of making Europe's education and training systems a world quality reference by 2010<sup>107</sup>. Today, 24 countries and European Social Partner's organisations are represented in the Network.

Several studies were also launched in the field of quality assurance in VET, and different initiatives to increase synergies with the Leonardo da Vinci programme were taken, e.g., the specific call launched in 2006, under the accompanying measures of the programme.

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<sup>103</sup> Communiqué of the European Ministers of Vocational Education and Training, the European Social partners and the European Commission, reviewing the priorities and strategies of the Copenhagen Process (Helsinki, 5 December 2006).

<sup>104</sup> See <http://communities.trainingvillage.gr>.

<sup>105</sup> Peer learning visits on quality assurance are included in the biannual work programme of the European Network on quality assurance for 2006-2007. Peer learning visits to Sweden and Finland took place in 2006. In 2007, a visit to Germany took already place, and two further visits are planned to Netherlands and Rumania. The visits are organised by the host countries with the technical and scientific support of Cedefop. Participants have been chosen in consultation with members of European Network on Quality Assurance in VET. A peer learning visit linking quality assurance in VET and Higher Education to the EQF implementation is currently being prepared by the Commission, with the support of Cedefop.

<sup>106</sup> Council Conclusions on Quality Assurance in Vocational Education and Training, 18 May 2004; Conclusions of the Council and the representatives of the Member States meeting within the Council (29 October 2004), reviewing the Council Resolution of 19 December 2002.

<sup>107</sup> A steering group has been set up by the Commission to follow-up the 'rolling agenda from Dublin to Graz'. This covers the launching of the European Network in Dublin, its work programme and the activities linked to the initiative of the Austrian Presidency in 2006 (conference in Graz) to promote cross fertilisation between QA in VET and HE.

Taking stock from and building on experience and achievements made so far through national and European practical initiatives, the Commission prepares a proposal for a Recommendation from the Council and European Parliament on the establishment of a European Quality Assurance Reference Framework, as a supporting tool to help Member States to promote and monitor continuous quality improvement/reform of their VET systems and quality management practices.

(v) Teachers and Trainers in VET

Teachers and trainers in VET have been declared a priority in the Copenhagen Declaration, the Maastricht Communiqué, and lately in the Helsinki Communiqué in December 2006. They are seen as important actors promoting attractiveness and quality in VET and in achieving lifelong learning for all. However, insufficient progress has been made so far in this area. The 2006 Joint Interim Report emphasised that "the professional development of vocational teachers and trainers remains a real challenge for most countries."

In the framework of E&T 2010, the Commission established in 2006 a sub-group of the cluster on teachers and trainers to focus specifically on VET teachers and trainers (see section 1.4.2. (ii)). This sub-cluster has representatives from 10 countries, Cedefop and ETF and co-operates closely with Cedefop (TTnet). Two peer learning activities were organised in 2006 on "VET partnerships between Schools and Companies – the Role of Teachers and Trainers" in **Austria** and on "Enhancing discourse between teachers and work life" in **Finland**.

The specific focus on VET teachers and trainers is supported by two studies which have been contracted by the Commission and will analyse the situation in this rather diverse field in Europe and identify possible actions and measures. The results of the studies will be available by the end of 2007. Cedefop has via the TTnet network focused its work in 2006/2007 on the validation and recognition of non-formal learning for VET teachers and trainers and on the feasibility of developing a common framework for VET professions (pilot project on "Defining VET professions").

VET teachers and trainers have also been identified as a priority of the first call of the new Lifelong Learning Programme.

(vi) Sectoral qualifications

The EQF draft Recommendation (see point 8.4.1) encourages international sectoral organisations to use the reference levels and principles set out by the framework and will thus provide a platform for increased cooperation with sectors.

A number of the EQF test/pilot projects launched through the Leonardo da Vinci programme during 2006 and 2007 will pay particular attention to the link between sectors and the EQF. These projects, along with other relevant initiatives, are being followed closely by Cedefop in order to identify factors facilitating or preventing this use of the EQF. This work takes into account the experiences gained from the European e-skills framework being set up (2006-2007) and from other relevant projects and experiments.

An extensive mapping of education and training activities at sectoral level have been carried out by Cedefop. The database resulting from this provides an overview over initiatives at this level.

#### *7.2.6 Progress in the field of adult education*

Although adult learning is recognised as a vital component of lifelong learning by the Member States, statistics show that adult participation in education and training is not only limited but it is also unbalanced. Compared with the Member States' own benchmark of 12.5% participation by 2010, the average rate in 2005 was 10.8%, with a wide variation among countries that ranged from 1.3% to 35%.

In order to address this issue as well as the other challenges Europe is facing such as demographic changes, rapid development in other regions of the world and poverty paired with social inclusion, the Commission published a Communication on "Adult Learning: It is never too late to learn" in 2006. The Communication builds, among other things on the results of the study "Adult Education Trends and Issues in Europe" produced by the European Association for the Education of Adults (EAEA) and a study prepared by Eurydice, the information network on education in Europe, on non-vocational adult education. In addition, it is the result of not only consultations with expert groups but also consultations at national level. The Communication underlines the importance of adult learning to support adults' employability, their mobility in the labour market, and their acquisition of key competences, while also promoting a socially inclusive labour market and society. Its key messages highlight the importance of increasing participation, the need to foster a culture of quality in terms of staff development, providers and delivery, the importance of implementing systems for recognition and validation of non-formal and informal learning and the need to improve the quality and comparability of data on adult learning. The Communication also identifies two specific target groups, the ageing population and migrants.

In order to address the challenges identified in the Communication, during 2007 the Commission will be developing an Action Plan on Adult Learning. The Action Plan will define concrete actions through which Member States can be supported to increase the participation in and the quality of adult learning. The content of the Action Plan has been defined through a series of consultations, including an expert group, four transnational meetings with representatives from Member States' governments, and social partners and the adult learning sector and national "sounding boards".

In the coming months, the focus will be placed particularly on analysing existing studies and surveys to identify the gaps, organising a peer learning activity in **Ireland** and launching two studies relating to the definitions used in adult learning and the feasibility of measuring progress in adult learning in Europe. Finally, a special focus will be given to the implementation of the Action Plan.

### **7.3. Summary**

The period 2005-2007 represents the second phase of the implementation of the Education and Training 2010 Work Programme moving from setting up of objectives to implementation.

Work undertaken at the European level within the Education and Training 2010 work programme continues to support Member States' reforms by providing common reference tools and supporting mutual exchange and learning.

During 2006 and 2007, the European Parliament and Council adopted Recommendations in the areas of key competences, quality of mobility, quality assurance in higher education and establishing the European Qualifications Framework for lifelong learning. The Council also adopted conclusions on efficiency and equity in education and training, following the Commission's communication on this subject, and adopted conclusions on a coherent framework of indicators and benchmarks which set out 16 core indicators for measuring progress.