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Vocational training for people with special educational needs

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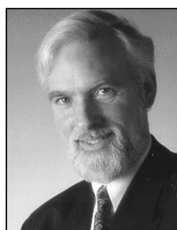
Errata

The article by Professor Jean Guichard of the Paris Conservatoire National des Arts et Métiers entitled "*Aims and issues in guidance counselling*" published in last year's May/August issue No 26 of the Journal (2002/II) was accompanied by a photograph not that of the author. Such an error has never before occurred and we offer Professor Guichard our sincere apologies. The photograph that should have accompanied the article appears here.

The mistake was immediately corrected in the electronic version of the Journal issue concerned, which can be downloaded in English, French, German, Portuguese and Spanish from our European Training Village website:
http://www2.trainingvillage.gr/etv/publications/publications.asp?section=18

Editorial

2003: European Year of People with Disabilities



Martin Mulder
Chairman of the Editorial Committee of the European Journal 'Vocational Training'

Éric Fries Guggenheim
Editor-in-Chief of the European Journal 'Vocational Training'

As Viviane Reding, the European Commissioner responsible for education and culture (1) reminds us in the press dossier of June 2003 on the European Year of People with Disabilities, 'in 2003, 37 million Europeans are living with a disability, that is, one citizen in ten.'

Europe responded to this situation early on. In its founding treaty, the European Community made a commitment to carry out appropriate actions to combat various forms of discrimination, especially towards those with disabilities, and to guarantee them equality of access to training and employment. This intention was reaffirmed in 2000 at the Lisbon European Council, and then incorporated in 2001 into the employment guidelines.

The starting point for this concern is without a doubt to be found in the democratic and egalitarian ideals that underpinned the creation of the European Union. The fundamental idea is that in response to disability, which may be perceived as a random injustice afflicting certain members of the social corpus, society must react collectively in order to overcome such mischance in accordance with the principle of mutual risk, by overcompensating for disability through positive discrimination.

However, in the context of an ageing society, the age pyramid of which is precariously balanced on a very narrow base, and a population of working age that is continually falling in relation to the overall population which it supports through its work, the issue of employing people with disabilities goes beyond the simple matter of fine principles and human rights. It becomes an economic and social necessity. It is increasingly obvious that while society must do all in its power to integrate people with disabilities, this is not simply because they need society, but more particularly because society needs their contribution to the collective effort to produce commercial and non-commercial goods and services, as is made clear in the OECD report entitled Transforming Disability into Ability (2), whose authors recommend in particular that individual support schemes should be developed, combining retraining with vocational training, help with finding jobs, financial allowances and access to different types of employment.

It would nonetheless appear, as is said by Murielle Timmermans, a young blind woman who spent some time as a trainee at the DG Employment and Social Affairs of the European Commission in Brussels, that 'Member States...do not regard the issue of disability as a priority' (3). It was in order to put the issue under the spotlight that the European Commission and the European Disability Forum (EDF) (4) organised the Year of People with Disabilities in 2003, carrying Member States along with them, with the intention of revealing the difficulties and discrimination which such people face, and emphasising their contribution to society and their right to have a chance to improve their lives and to see attitudes towards them change.

The choice made by the European Union is very clear: it is that of integration. In the field of education, and specifically in that of vocational training, this means seeking as far as possible to integrate young people with disabilities and/or special educational needs into ordinary educational establishments and reducing enrolment in specialised establishments to a minimum.

The issue merits debate, however. Integration into the ordinary school system unquestionably has positive effects in terms of socialisation, as Annet De Vroey argues in the article published here. She prepares young people with disabilities to integrate with their peers with no experience of disability, and non-disabled young people to get along every day with their disabled peers. However, the fact remains that protected systems often respond better to the specific educational needs of young people with disabilities and also have the advantage of

(1) 2003: European Year of People with Disabilities, examples of education and culture projects for people with disabilities / European Commission, Directorate General of Education and Culture. [Press release]. June 2003.

(2) Transforming Disability into Ability. Policies to promote work and income security for disabled people / OECD. Paris, 2003. ISBN 92-64-29887-8 (81 03 02 2).

(3) 2003: European Year of People with Disabilities, op. cit., page 33.

(4) The European Disability Forum / Forum européen des personnes handicapées is an EU umbrella organisation representing a large number of associations of people with disabilities. The purpose of EDF is to guarantee full access for disabled citizens to fundamental rights through their active participation in development and policy implementation within the European Union. The Forum has a website in English and French:

English: http://www.edf-feph.org/en/welcome.htm

French: http://www.edf-feph.org/fr/welcome.htm

providing reassurance for the young people and their families, thereby reducing the level of stress and hence raising their immediate quality of life. It is therefore vital to work in close collaboration with the families and with associations of people with disabilities, and above all to give specific training to the trainers and other specialists called upon to help young people with disabilities to move into an open environment, as Cristina Milagre, João Passeiro and Victor Almeida, who work as part of the INOFOR team, point out in their article on new actors in the training of disadvantaged social groups.

We publish four articles in this issue on vocational training for people with special educational needs.

The first article, Vocational training for disabled pupils in an inclusive setting, by Annet De Vroey, comes from Belgium and is an expression of opinion. It argues in favour of integrated initial vocational training in ordinary educational establishments. The author calls for the appointment of specialist teachers to every ordinary school rather than their concentration in specialist institutions, and stresses the need for specialist support for young people with disabilities during their school careers in the ordinary environment. Annet De Vroey lectures at the École supérieure catholique in Louvain, where she teaches a supplementary specialist course as part of teacher training for students who will then teach young people with disabilities in the ordinary environment.

The second article on secondary leaving certificates and vocational skills qualifications for disadvantaged young people, is the outcome of a research study conducted by three Norwegian academic researchers, Karl Johan Skårbrevik of the University of Ålesund, and Randi Bergem and Finn Ove Båtevik of the Møre Research Institute in Volda. This article reports on the measures needed in the ordinary education system at the level of upper secondary education and apprenticeship in order to ensure that young people with disabilities succeed in obtaining an upper secondary leaving certificate and vocational qualifications. One of these measures is the provision of close support for students, a conclusion which echoes that of the preceding article.

The third element of this mini-report is a Portuguese article by Cristina Milagre, João Passeiro and Victor Almeida, three senior technicians in the 'Training Methodology' unit of the Institute for Innovation in Training (INOFOR). The article is entitled new trainer profiles for socially disadvantaged group, and is a case study carried out in five public and voluntary institutions working to train and integrate disadvantaged groups into society and the labour market. It is clearly shown how the need to take into account the new training requirements of disadvantaged sections of the population has resulted in new ways of organising training, the main focus being training support, and hence in the emergence of new actors involved in training.

Finally, the fourth and last article in this report, Special needs students in vocational education and training in Norway - a longitudinal study, is the result of a research study conducted by an Associate Professor of Sociology at the University of Volda, Jon Olav Myklebust. His longitudinal analysis confirms the argument, put forward particularly by Annet De Vroey, that integrating students with disabilities into ordinary classes rather than placing them in special small groups or classes is still the best way of enabling them to obtain the desired skills.

Some readers will no doubt consider that the articles published here only give a very limited view of the issue of vocational training for people with disabilities. We would not disagree, and we feel it is obvious the debate must continue in these columns. We are fully aware that the European Journal 'Vocational Training' has to date published only a very small number of articles on vocational training for people with disabilities and/or special educational needs. For that reason, the Editorial Committee of the European Journal has taken advantage of the Year of People with Disabilities to relaunch the topic of vocational training for people with disabilities.

A number of factors explain why this topic occupies so little space in these columns:

- our procedure for selecting articles, the rigour of which guarantees the quality of the Journal, often frightens off men and women working hard on the ground to promote and implement appropriate social and occupational guidance, education and training, and integration into society and the

labour market. They are reluctant to spend time writing articles which may then ultimately be rejected on 'academic' grounds. When they do overcome their initial reticence and submit articles, they are too often discouraged by the considerable work entailed in the revisions required by the Editorial Committee. They do not follow up their articles, so that these remain unpublished, even though it would sometimes require only modest effort to produce a text that would be of interest to our readers;

- the specialist journals which are the first choice of academic researchers garner the bulk of the good articles submitted because they are immediately recognised by the bodies making decisions on careers.

We nonetheless think it crucial that vocational guidance and training, lifelong education and training, and social and labour market integration for people with disabilities should cease to be a specialist area. This journal has a varied readership - academic researchers of course, but also the social partners, political decision-makers, and men and women at the grassroots, and it is published in five languages ([5]). It sets out to disseminate information about vocational training, guidance and labour market access, wherever possible from a European and comparative perspective. In other words, it deals generally with all matters concerned with the relationship between training and employment, with the aim of contributing to the development of vocational training in Europe by supplying the various parties involved with arguments, tools and examples which will be of use to them in their everyday work. We therefore hope that this first small report on vocational training for people with disabilities will help to open up the debate and will encourage other authors to send us their contributions on a subject which will obviously not come to an end on 31 December 2003. With this in mind, we cannot resist quoting the reply from the young trainee at the DG Employment and Social Affairs mentioned earlier to a question posed by a member of the DG Education and Culture:

What do you think of the European Year of People with Disabilities? Do you think that Europe can play a part in making society in general more aware of this issue?

It's a good thing that Europe is taking this type of initiative. It makes it possible to present people with disabilities in the media and to the public. But the problem lies at the level of the Member States, which do not regard it as a priority and whose actions are completely invisible. Perhaps the EU should set precise targets, with concrete projects to be undertaken. And it would also be good if the European Year of People with Disabilities were not restricted to one year!

([5]) English, French, German, Portuguese and Spanish.

Annet De Vroey
VOBO - Postgraduate Teacher Courses for special educational needs
KH Leuven

Vocational training for disabled pupils in an inclusive setting

The postgraduate one-year course trains qualified teachers for special education as a service - not a place. Each year almost 20 students support pupils with disability or severe learning problems in mainstream classes for 2 days a week. These classes are in primary as well as secondary and vocational education. The staff of the postgraduate course coach the students in how to follow up, adapt, and collaborate with the school team. This coaching brings us into many schools, where we meet parents, teachers and pupils with and without disability. The process of inclusion strikes us with every new request as being the most interesting innovation in education for the last decades.

During the last decade many disabled children have been educated in mainstream classes. Education and training have followed a broader trend towards greater participation in citizenship of people with disability. Most European countries have already put the question of inclusive education on the political agenda. However, in some countries the transition from an (exclusive) special education system towards inclusive measures has taken a great deal of time, reflecting much hesitation after many years of these systems operating in parallel. Primary education often faces the challenge of inclusion, but in secondary and vocational education, inclusion is far from being common practice. There are many good examples of integration operating via private initiatives, adult organisations, second chance education, etc. Similarly, there are many positive experiences of inclusion already in evidence at all levels of education in some countries (as for instance in Italy, Norway, Sweden and the UK). However, these models of good practice do not seem to be sufficient to generate a real break-through towards inclusive education.

Consequent to these observations, we should ask ourselves whether the lack of inclusive education at all levels delays the participation of disabled people in work, or whether the lack of a consistent system of equal rights in education and training strongly discourages their participation in later life. In other words: is the fact that until now there has been no real break-through to full inclusion in education and training still a major obstacle for real job fulfilment for all? I believe it probably is an important obstacle, although new initiatives outside of education support finding mainstream jobs and encourage new training models. However, as long as disabled pupils are referred to special vocational training and education, we neglect a very powerful tool for increasing participation and citizenship, which could send out a strong signal to society: a common sense agreement, adopted at all levels of education, about equal rights for young people.

A matter of history

In some European countries, as, for instance, in Belgium, (full) inclusive education is still quite a new phenomenon. The system of special education has been expanding for more than 30 years and represents more than 6% of the whole school-aged population (3-18 years). Although measures for integrating pupils in mainstream classes have existed for almost 20 years, they have not been able to reduce the total number of special school pupils, except where they have been actively promoted and fully supported by local or regional teams. For some children, integration has 'worked' almost without a hitch. A few schools for special education already have more teachers visiting and supporting mainstream classes than they have actually working in their own institution. For instance, visually impaired pupils with no other disabilities often succeed very well in primary, secondary and even higher education, with (a little) help from an external teacher who supports them for a few hours a week, whenever they are in need of special help. Children with (other) physical disabilities, however, often have much greater difficulties in succeeding at school. This is due to many factors: the poor level of accessibility to most schools, the greater need for assistance with any kind of activity, and the limited number of hours of support given to them on integration 'protocol'. What about children with even greater special needs in the classroom, such as those with communication difficulties (deaf children or children with hearing impairment, autistic children...) or learning and intellectual challenges? At this moment, many schools are still not in 'good shape' to welcome children with any kind of disability. Measures introduced to improve integration have not, up to now, really changed school attitudes on issues such as their flexibility and creativi-

ty in adapting to demands, their organisation of internal teacher support, or their orientation towards external support, depending on the special needs of one or more of their pupils. As long as integration is dependent on a limited and fixed support system, only pupils with mild problems, and preferably very active, involved parents, can plan for their future in a mainstream setting. The others will have to wait until special education and mainstream education - including vocational training - change their belief system on disability. I believe it is the very existence of (the structure of) special schools alongside mainstream schools as two parallel systems, that slows the process of integration and inclusion. It is this very structure, which categorises and labels children as disabled in one way or another, that allows the 'medical and therapeutic' view of disability to survive. In this so-called 'deficit ideology' disabled people are not supposed to earn their living, are not expected to fulfil a job and are not seen as 'able to' participate fully in society. So it is not the disability itself that reduces the participation, learning and training opportunities of children and young people at school. The kind of disability doesn't matter in the end, it is the habit of sending children with special needs to special schools, special care, special places, and the habit of giving specialised and therapeutic answers to questions of special need (Fougeyrollas, 1998; WHO, 2001). The existing belief systems prevent special education from becoming a support service for mainstream education, and preserve it, instead, as a service in its own right.

A change of view

However, the shift from integration towards a demand for full inclusion at school has shown that many people want a more profound change. As long as all efforts to succeed must come from the pupil (and the few hours extra help he gets), many children will still be excluded from integration. Many of them will never succeed in following the same programme or in keeping pace with the others. This difference should be a point of departure for inclusion, rather than an exclusion criterion. Even when parents organise private help to support their child in the classroom, it does not necessarily change the attitude fully - it helps therapeutic 'business' to profit from the lack of school support and often harms the inclusion efforts of (un)qualified assistants. Only if all participants agree that it is the mainstreaming of the disabled pupil itself that triggers his present and future learning and participation processes, and only if no time limit is imposed for measuring progress, will the shift towards inclusion take place.

This more profound idea of integration, which we call inclusion, is slowly being introduced into some classrooms and schools. Primary schools have been the first to move towards this new social view of equal opportunities for all, although they feel very insecure about this development. Secondary schools, however, have shown hesitation, especially when they have a layered system of curricula and different study criteria that reflect the pupil's intellectual capacities rather than his interests or talents. At this level, special schools often offer job training, which is better suited to the needs of the individual. Many special schools for vocational training prepare their students for an integrated job, though others only prepare their pupils for sheltered work, arguing that no other jobs will be available for them in the job market. I believe it is crucial that secondary mainstream education - in preparation for (later) vocational choices and opportunities - should also follow this new tendency towards equal opportunities, thus becoming gradually more aware of the importance of inclusion.

In spite of all the efforts that are already taking place in primary education, vocational training has not had as much experience of inclusion until now. This is partly due to the fact that many disabled pupils are not particularly 'handy', which is often a prerequisite for vocational training. However, the need to adapt the level, pace and efficiency of performance is even more obvious in the context of vocational training than in primary education. Also, the need to allocate support, not only during the training process but also in the adjustment period in a mainstream work environment and beyond, might discourage schools from starting the complex process of inclusion.

Because it goes beyond integration - demanding a great deal of adjustment from the school, the job placement, the teachers and trainers - and because it deals with individualised goals, personal demands and work conditions, inclusion funda-

mentally challenges the process of vocational training.

Consequently, young people with any kind of disability or learning problem very often do not have a real choice between mainstream or special education – certainly not when it comes to job choices. Some of them, who have good intellectual capacities, can get through mainstream school and higher studies and choose for themselves whatever profession they want. But many others, who have a multiple disability or more complex problems with learning, are not free to choose, and are not even sure they will be able to fulfil a professional role in the job market.

In my opinion, every person has the right to fulfil any kind of social role. It is part of the quality of life. This is why vocational choices and vocational training are so important and why there should be greater awareness of the new perspective of inclusive education. There need not be a break in the process of inclusion and participation, either at the start of the education process, or in the middle. If inclusion is not fully available, the future of inclusive education is very unstable, and the future of the pupils involved is not guaranteed to be any better way than it was before. It may even be worse. In order to work towards full inclusion, we only need to agree on some basic principles, which I will introduce and argue for later on in this article. If we neglect these basic principles of inclusion, we are not doing a better job than we did before.

In the meantime, the need for integrated vocational training is growing and new initiatives are being taken and promoted by adult organisations instead of by educational institutions. Adult vocational training outside the school system will have to become an important and continuous partner of vocational training at school. Simply because of its lower pace, efficiency and productivity, more time and training may be needed, and new models of in-service training need to be developed, especially for the improvement of job chances for the disabled.

Why inclusion is a key concept towards role fulfilment, personal choices and job training

Work is becoming a major domain in people's lives, whether we applaud this development or not. The choices we make for our (future) profession are of enormous importance. The work we do very often gives us the most important and the most secure social position we have during a large part of our life. Other social roles or positions we take are not necessarily less worthy. On the contrary, they can be of a deeper or more continuous kind. But the very fact of taking a place amongst other professionals brings with it a certain (self) respect and independence.

Those of us who have the opportunity to make our own choices without meeting all kinds of barriers are perhaps the privileged ones. Many people, not only disabled people, are not free to choose. But the main idea of equal opportunities in education is to guarantee as many pupils as possible this freedom of choice, in order to build their own future. The way to achieve this is not by 'selection of the fittest' at the start, nor by meritocracy - encouraging (only) those who follow the system and show that they are worth being encouraged (Nicaise, 2002) - but by not giving up on any member of the school community. Only in this way will all of them come to a point where a fair choice of either vocational training or higher education - or both - is reached. Any system that narrows job choices at too early a point in the school career neglects the importance of personal choices.

Disabled people very often meet these kinds of barriers. Even if we know from the start that a particular boy or girl will not become a doctor or a lawyer, we should not deny his or her rights to fulfil a professional role in society. Neither should we deny his or her rights to choose a profession. A boy who is intellectually disabled may not become the hospital manager, but can speak for himself if he says that a hospital environment is the job environment he prefers and wants to be part of. We should not consider these young people's dreams any less realistic or reliable than those of others, who themselves often change perspectives and choices.

We live in a society where lifelong learning is encouraged and where second choices for vocational training and job choices are allowed. Yet, when it comes to work, it often takes a lot of courage for the people involved to leave their (often negative) school experiences behind them and start all over again. For many people with a disability who

have been told that their choices were limited - either sheltered work, or no work at all - adult vocational training often gives them new perspectives, but can't take away the lead others have built over them.

Only by providing good, inclusive vocational training within the education system can we prevent people from losing an important social position, self-respect and independence. For those who are depending on others for so many daily tasks, this kind of independence - perhaps financial, perhaps intellectual - can make a major difference in their life. This sense of interdependence is given an even greater meaning by fulfilling a job where others are relying on you. The same feeling of interdependence is one of the most essential values of inclusion.

The practice of inclusive education

Of course, some disabled pupils already follow a vocational training programme in an inclusive setting. In my experience, it is often organised either with a support team that is provided by their parents, or with official support because it is that they are 'able to succeed' within the standard curriculum. However, in Belgium the number of disabled young people in mainstream vocational secondary education is still quite low. When it comes to vocational training options, many disabled pupils are not only at a disadvantage because of the standards required in the curriculum, but even more so because of the practical demands: they have to be quick, efficient, with good motor skills and very mobile. The transition to vocational education is often the breaking point, rather than the access point to inclusion.

While many primary schools are slowly learning how to deal with the demands of inclusion, secondary schools, and especially vocational schools, will have to start following their lead. In order to succeed they will have to adopt the main ideas and principles of inclusion that are crucial for present and future participation among their peers. Let us first look at common principles for inclusive education before drawing attention to a few more specific consequences for vocational training.

Inclusive education is a continuing process in which many people are involved. It is, therefore, a vulnerable process. If we focus on five main tasks for inclusion, schools and pupils can benefit from this continuing process (De Vroey & Mortier, 2002).

❑ First, we have to work on a common view and a common language: as a school community, what is our attitude towards learning problems, disability, behaviour problems, and differences in achievement? How do we deal with pupils who are unable to keep up with the curriculum? How do we communicate with them if they have difficulty in speech, in comprehension? How do we keep in touch with their parents? Many questions arise that need to be discussed. By learning about the main purpose of inclusive education - maximising participation in all life domains - we will be able to change existing attitudes and regard 'problems' more as differences and challenges. This stage is not a first step, it is rather an underlying shift within the whole school, permitting more visible actions and changes to embed themselves into the school culture, practice and policies (CSIE, 2002).

❑ Second, we have to recognise the need for an individual education plan and start working with it. In inclusion, the IEP is not based on a description of the developmental and educational steps that are necessary or upon remedial activities, but it rather takes the form of a support plan. Individual goals are identified based on the opinions, dreams, interests, expectations and observations of the main participants, necessary adaptations are searched for and agreed upon, and participation is explicitly planned. Organising inclusion means carefully matching all activities with specific goals and filling the need for support. It also means careful planning of assistance, without neglecting all available natural support that can be, or already is, provided by peers. The evaluation of individual goals, as well as reviewing the support given, are continuous tasks.

❑ Next, we focus on the organisation and management of daily class practice. Teachers and trainers will have to be aware of their educational 'style' as well as their pupils' learning style. Their belief in the learning capacity of every pupil is crucial, even if they cannot 'see' the kind of achievements they expect from most pupils. Multilevel instruction is indispensable in an inclusive setting, carefully planned and chosen. Teachers will probably need training for planning differentiated activities and will need to

become more used to working with support staff. Collaborative class practice is often the most interesting working method, because of the interdependence of the pupils that is created. Tutoring and other forms of peer support have to be encouraged.

❑ Further to this, a crucial criterion for successful inclusion is the social support that needs to be guaranteed. This means it needs to be planned and monitored through the IEP and its use should become a natural feature of best practice within the culture of the class and the school. It is probably the most vulnerable link in the whole inclusion process, so we have to take care of it. The focus should be on creating a variety of social support systems among peers, on developing good communication skills among all pupils, and on making the teacher a model practitioner of how to support others instead of letting others down. Even friendships are a particular area to be examined. Often, disabled pupils need some help to keep friendships going, and by organising activities for groups of friends, schools can encourage friends to take care of each other.

❑ Finally, the collaborative skills of all staff members and every other participant will need to be evaluated. Inclusive education introduces a much more intense need for collaborative practice at school and at the same time widens the role of school staff. They will need to meet regularly with parents or other carers and with external advice or guidance centres. Additionally, they will need to work together with support staff, look for more effective internal collaboration and look ahead to plan future support and to make contacts with people who might need to be involved. The aim is to move towards a model of transdisciplinary and integrated collaboration. It implies role release, creativity, flexibility and the sharing of each other's competences.

These five key points for action all differ from what we have been used to organising in special care in one way: the ultimate criterion has now become whether we can preserve the most 'natural' social environment for the pupil, thus preparing this environment and the pupil for further participation. Support can come from his own social (peer) group to a great degree; commitment and care can be found in his own community; goals are chosen on a natural basis, meaning that whatever is learned helps him to maximise his participation among his peers. This ecological model is the basis of inclusion rather than the former developmental and therapeutic model.

At the same time, these five principles have led to some valuable characteristics of special education being introduced into mainstream education, namely curriculum change using individualised goals, materials, and assistance based upon a systematic follow-up of the pupils' skills and comprehension.

How to prepare vocational training for inclusive education

The inclusion process does not need to be different in vocational training. The same features are essential. However, there are a few circumstances that distinguish vocational training from other inclusive education.

❑ First, vocational training has a clear link with a given professional profile. This is very often a one-to-one relationship: the profile of the gardener, the hairdresser etc., dictates the goals and skills to be achieved. Primary schools, and even many types of secondary schools, allow pupils a great deal of choice when it comes to making job and career decisions. This gives them the opportunity to change goals, to modify assessments and to adapt many of their practices. The end goals are more general. Vocational training can modify goals and assessments as well, but will it deliver a qualification that will allow the disabled person to find a job? The first of the five steps, talking through the whole meaning of inclusion and taking care of everyone's future as a school team, deserves, therefore, careful follow-up. How can we maximise the job opportunities of all pupils, including those with challenging abilities? Do we allow them to take more time to learn how to perform the tasks that are essential, or do we agree upon different evaluations of the performance level of our pupils? Qualifications can be modified and probably already are, by describing the modules a trainee finished, or by assigning assist or partial accreditation to a person's qualification. But before adapting goals consideration should be given to providing all the support that might be needed, both in a training environment as well as in a working environment.

❑ In vocational training settings, observation in the classroom and in work placements may take more time before planning for support can start. Striving to achieve as much learning as possible – participating fully or partially in the classroom or the work environment – we will have to consider every possible obstacle to, or support for, full participation at work in the future. Therefore, we will need good task analyses of all practice required before we can plan for adaptations, assistance or support. Observation of the social support system that already exists is very important, as is noticing the lack of support at certain moments that are crucial for the learning process of the trainee.

❑ Planning for the future, together with the pupil, will have an important role in the whole planning process. The near-future aspect of vocational training not only intensifies the need for collaboration among staff members of the school and other partners from outside, it also calls for active input by the disabled person. Personal choices should no longer be translated by parents (only), but - if possible - asked directly. This will give us a better insight into the social role the person hopes to assume later on, and into the significance of particular choices and the importance of particular friends or assistants. Difficulties that are met very often and cannot be changed easily should be discussed together with the pupil, in order to help him or her to change perspectives if necessary. Perhaps transport is already very tiring, which makes a full-time job almost impossible. But it may also be true that the disabled pupil can think of particular solutions which others fail to consider.

❑ Cooperative learning is not difficult to incorporate in vocational training. Most vocational schools already work cooperatively without labelling it as a collaborative skill. Whether pupils learn to collaborate and to support each other to enrich the group's performance, depends on the tasks to be done and on the interdependence of the different tasks undertaken by one group. The new challenge and focus for inclusive collaborative work may be on the process of dividing the tasks in the groups, agreeing upon a common goal, and on all communicative, social and cognitive aspects of a group performance.

❑ Social support systems are relatively new in vocational education, but can be organised the way they are in other schools. The amount of peer support required often depends on the extent of the group interaction needed and the degree to which all teachers and trainers take a leading role as a model for support. Tutoring, mentoring and buddy systems for assistance are valuable methods for increasing support and facilitating friendships. Perhaps the more obviously slower pace of disabled students, the lower level of performance, and the need for assistance calls for very open and honest information being given to their classmates. If these obvious differences are not discussed or the risk of not being understood is much bigger.

Special schools for vocational training have paid close attention to linking vocational skills with practice in real working conditions. Many schools work together with partners in different private companies. But the experience they have seems to be limited to a small group of disabled trainees and does not include pupils with more complex problems. These schools and their staff might be the ones to advise or to support mainstream schools providing vocational training when working towards a better inclusion policy and practice.

Adult organisations for disabled people are providing another means for vocational training. They seem to be more aware than educational institutions of the present emphasis placed on personal choices and citizenship for disabled people. They also offer many new initiatives to change the professional perspective of the person involved. Until a few years ago, many intellectually disabled people followed a weekly programme in a day care centre, where taking part in a variety of activities seemed to be the priority. Now many day care centres let their members opt into one major activity, allowing them to become a baker, a gardener, or any other professional 'role' of their choice. The latest initiatives try to help these people to find a job in an inclusive working environment. These experiences may also serve as a model for the transition to inclusive vocational training.

Summary

Inclusive education is growing. However, in order to continue inclusion in all life domains, including work, vocational training will have to follow. Disabled people meet many obstacles when it comes to job choices. Apart from political and economic difficulties, one of the major barriers is society's opinions on disability. Only by learning together and by acquiring the professional skills needed in a mainstream group, will disabled people be able to find a respected social position later on. The inclusion process does not only affect their own development and participation chances, it affects the attitude of all of their classmates and peers. When pupils are used to learning, studying, communicating and working together with their disabled peers, when they have good role models showing them and reinforcing the values of (peer) support, they will learn how to coach, support and assist people with disability in the future. It may change the attitude of many adults later on, and of schools, vocational partners, companies, society. Being a professional in the near future, they will know how to deal with questions of support in working conditions. This does not mean every disabled person is obliged to work, but it means he has a right to take a place in a working society, in a community, in all domains of social life, and to have training that prepares him for certain specific professional tasks. If vocational training follows the ideas of inclusion, we believe it will help to bring about a breakthrough towards real citizenship for people with disability.

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Higher education entrance exam or craft certificate for disadvantaged adolescents

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The article reports on measures that need to be taken by upper secondary schools and the apprentice system in order to help disadvantaged students obtain a higher education entrance qualification or a craft certificate. The results presented are based on conclusions from a project initiated by the Norwegian Ministry of Education. Through the project, knowledge and experience were gained on how the schools could plan, organise and implement individual educational plans for disadvantaged students. The students who participated in the project all aimed at a higher education entrance qualification or a craft certificate. At the end of the project period this was still the goal for about 77% of the participants.

Introduction

In Norway, all young people aged 16 to 19 have a legal right to upper secondary education. This right, established by law, was implemented by the reform of upper secondary education in 1994, referred to as Reform 94. Its goal is to ensure that as many students as possible attain either passes at higher education entrance level, which qualify for college or university entrance, or a certificate as a skilled worker. In order to help disadvantaged or handicapped students to achieve this goal, they are given priority enrolment in the first year course of their choice and they are also given the right to special education, if this is needed. Initially these measures are based upon an evaluation of the problems they faced in lower secondary school.

An evaluation of Reform 94 focused on its consequences for the disadvantaged (Kvalsund and Myklebust, 1998). For this group it was found that, of the students who started in upper secondary schools in 1995, about 45% had dropped out during the first 3 years. It was also found that a relatively high number received their training in separate groups or special classes, a factor which may have hindered them in obtaining a diploma or certificate.

Based upon these findings, the Ministry of Education initiated a three year project to assess how schools could create and implement individualised educational plans for disadvantaged students seeking higher education entrance qualifications or a craft certificate and thereby help achieve the objective of Reform 94.

The project referred to in this article is one of several research and development projects initiated upon evaluations of Reform 94. Partial competence (Skårbrevik and Båtevik, 2000) and *Differensiering og tilrettelegging i videregående opplæring*[1] (Dale, 2002) are two such projects. The aim of the first was to find out how students could obtain partial competence or qualifications that were related to certain modules or part of modules as described in the syllabus. The aim of the second was to identify practical arrangements which could contribute to an individualised programme for each student in accordance with their abilities and educational needs.

Evaluation of the project

The project referred to in this article was evaluated by the present authors. It was carried out in three counties and nine upper secondary schools. In one of the counties, four training offices also participated. The evaluation was based upon written reports by, and interviews with, the project coordinators in the counties, interviews with coordinators at the schools and the training offices as well as students, apprentices and their employers. Interviews with the coordinator at the county level and the local coordinators at the school level were conducted twice a year. As many teachers as possible were interviewed at least once a year. Interviews with the other relevant parties were conducted once or twice during the project period. The interviews were based on an interview guide which focused on those aspects of the programmes important to individual students and could differ from one student to another. In addition data about the progress of the students was collected each year. As most of the students sought a craft certificate, the article concentrates on this group. It should be emphasised that while the students included in the project followed their own individual programmes, these programmes were within the frame-

[1] Differentiation and organisation in upper secondary education.

Table 1

Disabilities among those participating in the project

	Number
Visual impairments	4
Aural impairments	2
Orthopaedic disabilities or motor coordination problems	8
Problems with language or speech	15
Learning disabilities	32
Psychosocial problems	40
Medical problems	11

work of the main objectives of upper secondary education.

Upper Secondary Education in Norway

Upper secondary education in Norway is organised as a three-year programme for those who seek higher education entrance qualifications and as two years of schooling and two years as an apprentice for those seeking a craft certificate. During the last two years as an apprentice, the responsibility for training lies with the employing company and a contract for training is drawn up between the apprentice and the employer. Companies that employ apprentices receive a grant from the government and in the case of adolescents who need some kind of extra attention from the employer additional subsidies are given. Each county has an office for apprenticeships which approves suitable companies, helps students from upper secondary schools to make contact with them and obtain a contract for training. This office also appoints a committee which evaluates the performance of the apprentices before they get the craft certificate. In addition, businesses within the same craft often establish their own training office which assists with the recruitment and training of apprentices and supports them generally during their apprenticeship period.

Students and apprentices participating in the project

The problems found among the 64 students and apprentices participating in the project are given in Table 1. Some youngsters had more than one problem, therefore the total number of problems exceeds the total number of students.

As can be seen from the table, the majority of the adolescents had psychosocial and/or attention problems or learning disabilities when accepted into the project. Physical disabilities were less common but persons with visual, aural and orthopaedic problems are included. Compared with the sample of disadvantaged students studied by Kvalsund and Myklebust (1998) in the evaluation of the 1994 reform, this sample contains more individuals with psychosocial and/or attention problems.

Results

The project lasted for three years only. Most students who aimed for a higher education entrance qualification would not be able to obtain a full diploma during the project because they needed extended time to complete the programmes and some were included in the projects in the second year of the project period. The conclusions are therefore based on the status of the project at the end of the academic year 2000/2001 (spring 2001) when most of the students had still to complete their education or apprenticeship. However, most of the students had progressed so far in their programmes that it was possible to conclude whether the attainment of a higher education entrance qualification or a craft certificate was a realistic prospect. The schools or the offices for apprenticeships had made plans with the students for the remainder of their programmes at the end of the project period and Table 2 show what goals were set by the students as reflected in these plans.

The goal of the project was to help as many of these students as possible obtain a higher education entrance qualification or a craft certificate. At the end of the project period this was still the aim for 77% of the participants. At this point 39 of the students had a craft certificate and 10 a higher ed-

ucation entrance qualification as their goal. The rest had either dropped out of school or aimed at partial documented competence, a diploma for students unable to achieve higher education entrance qualification or a craft certificate standard (Skårbrevik and Båtevik, 2000). At the end of the project 24 (38%) of the students were in their last year in school or were apprentices.

The dropout rate is less than found in the follow-up study of disadvantaged students carried out in the evaluation of Reform 94 (Myklebust, 2001) where 45% percent of the group had dropped out after 3 years. It would appear that the measures taken in the present project had encouraged students to stay in their programmes and may also have helped increase the number receiving a full diploma or certificate.

Table 2

Students' aims for upper secondary education at the end of the project period

	Boys	Girls	All
Higher education entrance exam	6	4	10
Craft certificate	26	13	39
Diploma of partial competence	7	2	9
Not in upper secondary education	5	1	6
Totals	44	20	64

The importance of a new context for education and training

In general, the problems faced by students in primary and lower secondary school initially define their need for special education or some other measures when entering upper secondary school. However, in upper secondary school, students are faced with a different culture, new subjects and new teachers and, for many, an environment more conducive to learning. We have what Bronfenbrenner (1979) defines as an ecological transition. For 13 of the 64 students who participated in the project, the educational situation changed significantly with the transition from lower secondary school to upper secondary school. In half of these instances social problems were more or less eliminated in a cooperation between the school and the students. For the others it was a question of new positions and new roles as they entered a new social situation and this seems to have had an effect upon their behaviour and motivation. In some cases it was reported that problems perceived at lower secondary school did not appear when the student entered upper secondary school, this applying to behavioural problems as well as to learning difficulties.

Slower progress had been considered an appropriate measure for several of the students in the project. In most cases the students had taken two years to complete the first year basic course. Some students in the vocational track had also taken two years on the advanced course. According to the plans, 21 (34%) would complete their courses required for higher education entrance qualification or craft certificate within the normal time schedule of 3 or 4 years, 12 (19%) would take 5 years and 9 (14%) 6 years or more([2]). For the students on the vocational track, this slower progress in school was combined with practical training in the workplace and viewed by teachers and students as a necessary initiative in ensuring completion of the programme.

The first year basic courses appear to be an obstacle for many of the students in the vocational track. However if students manage to pass this stage, the more advanced courses and the apprenticeship seem to be easier for them to complete. At the end of the project 54 (84%) had at least completed the first year of upper secondary education.

One third of the lessons in the basic courses in the vocational track of upper secondary school are academic subjects. Many of the students in the project had a history of failure from primary and lower secondary school in these subjects and they lacked the basic knowledge, skills and motivation for this kind of schoolwork. By extending the basic course over two years and combining it with training outside school, upper secondary school became more meaningful to the students. This gave them a break from some of the theoretical subjects, and they found they were able to carry out

([2]) For seven of the students it was difficult to estimate the time required to obtain the aim of craft certificate or higher education entrance qualification. In some of these cases it could take time to get an apprenticeship.

their work while in the workplace. This increased their self-confidence and, in time, their motivation to complete the academic subjects needed to receive a certificate. Similar conclusions were drawn from an earlier project with almost the same target group (Skårbrevik and Båtevik, 2000). Many of the students who had this combination of school and work were also offered a contract for apprenticeship by the same company.

Preventing dropping out

Many of the students in this project had social or psychosocial problems combined with attention deficit disorders. Without the special attention that these students received throughout the project period many of them would have dropped out. Primarily, teachers must show a positive interest in the student and, as expressed by one student, their presence has to be recognised and appreciated and the reasons for absence established. Often these students stay away for several days without the school taking any action to establish their whereabouts. If this absence persists for weeks it can be very difficult to get the student back to school. In the project, some schools initiated special procedures aimed at preventing this happening. Close cooperation between teachers, school counsellors and family, and in some instances with school psychologists or social agencies, is called for, especially when the student becomes an apprentice. In many cases the employer and other employees do more than normal to help the apprentice when problems arise. However, assistance is often needed from the training offices or the other agencies who know the apprentice, and the upper secondary school might also assist in some cases. The school counsellors who know the apprentice have the professional knowledge and skill to intervene in a constructive way if problems should arise. The school's responsibility for students normally ends when the apprenticeship begins. However, in the project it transpired that it was important that the guidance counsellor or a teacher could continue to assist the student with social and practical problems throughout the apprenticeship period, as well as the employer. This presupposes a more extensive integration of the school-based education and training with the apprenticeship system.

Formal issues related to transfer

There are several transfers within upper secondary education which also entail some formal procedures, especially within the craft certificate track. When students have finished the basic course, they have to apply for admission to one of the more specialised courses in the second year. When the second year is finished, a workplace for the apprenticeship has to be found. A key task for the project was to help identify procedures which could smooth the transfer from school to the workplace and apprenticeship. This required close cooperation between student, school, the county-based offices for apprenticeship, the training offices established by the employers and the workplace. For example, the company should apply for additional subsidies from the government for apprentices in need of special attention. The formalities involved mean additional work for the employer which was found burdensome. It takes time before the applications are granted, making it even more difficult to obtain an apprenticeship for the disadvantaged. As a result of the conclusions from the project, new procedures were established where the subsidies were granted before the companies were approached, making it much easier to obtain a contract of apprenticeship.

Alternation between school and workplace

Many employers were sceptical about accepting apprentices needing special attention. In order to overcome this, schools actively sought to introduce their students to appropriate businesses at an early stage, for example while the student was still in the basic course, combined with slower progress. However, this was most often used in conjunction with advanced courses when the transfer to apprenticeship was being planned. In most cases the students spent one or two days a week at the workplace and this approach was successful for several reasons. First, prospective employers got to know the students and, in most cases, became happier about accepting them as apprentices

later on. Second, the students could combine theory with practical training and recognise the relevance of the courses being taught at school. Students were more motivated as they could get out of school and do some practical work even though it might mean taking an extra year to obtain their certificate. The alternative could mean they failed courses at school and had to take an extra year anyway. This alternation was not always easy to implement as the work at the businesses concerned had to be adjusted to school schedules and, to avoid problems, cooperation between schools, students and employers was essential.

The role of the training offices

These offices are set up by different businesses in order to assist them with the recruitment and training of apprentices. In one county some offices also participated in the project while in the other counties they were involved only if the coordinators found it necessary. Cooperation with these offices was crucial in order to secure an apprenticeship for many of these students. However, in some instances these training offices did not want to give priority to disadvantaged youth. Employers are free to recruit the apprentices they want and it is not surprising to find that some want to recruit only the most able students. In several cases it was found that without a special effort by family, teachers or others that knew the students, it would have been difficult to secure an apprenticeship for them. It is apparent that the goal of upper secondary education, that all youth should be given a chance to obtain a craft certificate, can only be attained if the students have a network that helps them secure an apprenticeship. At the end of the project 16 (25%) of the adolescents had obtained apprenticeships and others were in the process of obtaining such contracts with employers. From interviews with the students and employers and from information from local teachers involved in the projects, it can be concluded that to secure apprenticeship for these adolescents it is necessary to go beyond the regular procedures and involve the support of the school or the office for apprenticeships.

The training offices also assisted the employers by way of regular meetings with the apprentices where training related problems or other issues were discussed. The employer found this assistance to be beneficial in ensuring the quality of the training and was of special importance in working with disadvantaged youth.

Information is a key issue when students transfer from one year to another during school years or from school to apprenticeship, and a lack of it is often a cause of dissatisfaction for almost everyone involved. It is important to pass on relevant information about the student or apprentice and to be aware that when the student enters a new learning or training situation his or her problems might appear differently than in the former context, and even disappear. Employers with no experience of taking on students might be wary and anticipate difficulties but it was found that some of those who had employed disadvantaged youth as apprentices in the past had become more inclined to employ similar staff in the future. It was found counter productive to withhold information in order to obtain an apprenticeship as this could destroy the necessary trust between the employer, the school or other agency concerned and in turn make it difficult for the employer to plan and implement satisfactory training for the apprentice.

Cooperation

Several of the students and apprentices had social or psychosocial problems. For this group, the support related to these difficulties was as important as the special adjustments made to the educational or training programme. Often the educational problems disappeared when the social or psychosocial problems were resolved and the social situation of the students or apprentices was stabilised. However such circumstances required close cooperation between youngsters and their families, social agencies, school psychologist or other agencies outside school. Officially the schools do not have any responsibility for the students once they have finished their education and are seeking an apprenticeship. However, it can be concluded from the project that for these students, schools can play an important coordinating role during this and the apprenticeship period.

While the schools had counsellors and local project coordinators to attend to these problems, such resources are not found in the workplace. If problems occurred, the employer had to rely on the training offices or the county-based offices for apprenticeship. As reported in other studies, businesses which had employed apprentices with serious handicaps stressed that without assistance from these offices they would not have been able to complete the training (Båtevik, 2000). Throughout the project it was found important to establish support groups consisting of representatives from the school psychological office, social agency or training office for some of the apprentices. These groups could assist the apprentice as well as the employer in dealing with problems related to the training or the social situation of the apprentice.

Discussion

This article has mainly focused on the students who sought a craft certificate. Ten students sought a higher education entrance qualification and these had mainly physical problems or visual or aural impairments. The physical or technical needs of these students were generally satisfactorily met by the schools. Their progress was also satisfactory, even though most of them followed an individual plan that meant it would be more than three years before they could get a diploma. The main problem for these students was their social integration with other students.

Several of the students who chose the vocational track needed a new start in upper secondary school. For years they had experienced failure during the primary and lower secondary school years and many of them had received extensive special educational support. The upper secondary school provided a new context for learning that gave many of these students such an opportunity.

With the reform of upper secondary education in 1994, a majority of the academic subjects in the vocational track were allocated to the basic courses of the first year. Thus these students met the same subjects in which they had failed earlier. They also found them to be of little relevance to the craft towards which they were working. Students were in need of an approach which primarily gave them confidence in themselves. Our study shows that combining theory with practical training in the first years ensured success for many students. Using an environment for learning outside school provides a flexible way of organising courses and has been found to be very useful for disadvantaged students. Other projects have reached similar conclusions (Skårbrevik and Båtevik, 2000). This combination of teaching at school and practical training in the workplace could prove very useful for all students in the vocational tracks of upper secondary education, and calls for a revision of the syllabus that provides for more practical training during the first year. The Norwegian Parliament has asked the Ministry to take initiatives that increased the integration of theory and practice in vocational education. (Innst. S. No 139 [2001-2002].

The education act provides a formal right for at least three years of upper secondary education for all youth. However, this right has one important exception for students who aim for a craft certificate. The employer is free to decide whether to sign an agreement of apprenticeship with a student or not. This is a weak point in the egalitarian tradition of the Norwegian school system that might place a student with lesser personal or social resources at a disadvantage. It is especially difficult to obtain an apprenticeship for these students. The study shows that success in this respect often depends on personal knowledge of the youngster by owners of small businesses in the local community or on special efforts by the school or training offices. This is a problem that has been addressed in several documents, for example in a White Paper to the Parliament in 1999 (St meld No 32, 1998-99), but without any further initiatives.

The evaluation of the project has shown that there are several problems to be solved if the goal of obtaining a craft certificate should be made available to as many disadvantaged young people as possible. However, it has also shown that by fairly simple measures and close monitoring of the students this goal could be realised by a majority of the students who participated in the project.

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New trainer profiles for socially disadvantaged groups

The need for greater efficiency in certain systems or aspects of training for socially disadvantaged groups in Portugal has led some training bodies to reorganise training and introduce new training methods. We look here at some examples of good practice that have proved particularly effective in adapting training to meet these groups' specific needs.
The study on 'Emerging training profiles for disadvantaged social groups' carried out by INOFOR sought to identify innovations in forms of training and trainer profiles adapted to the needs of socially disadvantaged groups.

Introduction

Generally speaking, official provision of education and training in Portugal has had difficulty coping with the specific needs of socially excluded groups. The lack of success in some cases was not due merely to trainees' unsuitability, unwillingness to learn or other shortcomings, which were often put forward in explanation.

Because of this, and conscious of the generally low level of education and occupational qualifications and skills in Portugal compared to the rest of the EU, the country's research organisations, led by INOFOR (the government body concerned with promoting training innovation and quality) took on the challenging task of proving the prevailing discourse wrong. These bodies set out to identify and disseminate good training practices that would help to solve the training problem for groups at risk of social exclusion.

The study on 'Emerging training profiles for disadvantaged social groups' carried out by INOFOR under the Community's EMPREGO /INTEGRA programme sought to identify innovations in forms of training and trainer profiles that were particularly adapted to the needs of socially disadvantaged groups.

The term 'profile' is used here to mean the combination of knowledge and of occupational and behavioural knowhow required by trainers in order to deliver the new forms of training. We refer to 'emerging profiles' because they reflect innovations not covered by officially recognised occupational profiles.

A new understanding of social exclusion

We use the term 'disadvantaged' for all persons who find themselves in a situation of exclusion.

The concept of social exclusion, frequently encountered in sociological theory, has come to replace the concept of poverty in social debate because it highlights complex issues that go beyond a person's financial situation.

Exclusion relates to an existing integrated set of basic social systems characterised by differing degree of inaccessibility. Viewed thus, the notion of exclusion also bears a converse relationship to the notion of citizenship. The latter concept is described by Bruto da Costa as effective access to a set of basic social systems that may be grouped under five main headings: 'social, economic, institutional, territorial and symbolic benchmarks' (Bruto da Costa, 1998, p.14).

The inability to access the various basic social systems is the product of a number of factors that increase the risk of social exclusion, such as low income, unemployment, low educational level, job instability, unstable family relationships (particularly marriage), poor living conditions (lack of space, poor sanitation or substandard dwellings), poor physical or mental health, alcoholism or drug addiction, worries about dependants, social isolation and the trajectories of poverty (Hespanha et al., 2000). Although all subject to the same risk factors, groups threatened by social exclusion, who we can refer to generically as 'socially dis-advantaged' (Capucha, 1998), by no means constitute a homogeneous population. They simply share certain problems that result from particular circumstances.

To be able to identify the various risk situations deriving from the unequal distribution and accumulation of different handicaps (exclusion from or inadequate inclusion in the labour market, low income, inadequate housing, low educational level, lack of skills, low social and political involvement etc.) we talk of 'summations' of poverty and social exclusion situations, that in turn find expression in a more or less

coherent, consolidated way of life (Luis Capucha, 1998).

The groups that may be considered socially disadvantaged, therefore, are 'those who, because they find themselves on the lowest rungs of the social scale, are particularly susceptible to poverty and tend to become victims of social exclusion and to accumulate handicaps that impede access to full citizenship for most of them' (Capucha, 1998, p.8). The fact of being subject to a number of complex negative discrimination factors generates within these groups 'identifying mechanisms that find their expression in a specific way of life' (loc.cit.).

If we understand social exclusion in this way rather than as an economic problem solvable by a money grant, combating exclusion implies a political devolution of power. This could occur through the creation of a training system that provides access to social, economic, territorial, institutional and symbolic power.

Approaches to training for the socially disadvantaged

Given the precarious situation of the socially disadvantaged in terms of training and employment due to their lack of educational and occupational qualifications and of work-related, personal and social skills, training cannot just be conceived in the strict sense of implementing a curricular programme but must be viewed in a broader sense.

In fact, this broader concept of training calls for a diversification of training strategies. It must be viewed as a process (Castro, 2000) that combines activities normally understood as training (which we shall refer to as training components - general, theoretical and practical, and social and cultural - traditionally covered by the formal training model) with new types of activity. The latter are proving themselves to be equally important for the integration of the socially disadvantaged in the world of work (Nunes, 2000). We shall call these training dimensions.

The term 'training dimensions' is thus used to mean those activities that complement the formal elements of the training curriculum. They aim to motivate individuals to take part in training, and to work towards social and occupational integration, by helping them to plan their personal life and career realistically and in a manner consonant with the motivation, ability and aptitude of each; to adapt the content and methods of teaching and training to trainees; to assist them with solving personal and social problems by creating conditions favourable to learning and progress in their personal and social plan; and to devise with trainees or their employers strategies for achieving their social and occupational integration (adapted from Guia do Apoio ao Utilizador - Acreditação das Entidades Formadores, INOFOR, 1998).

Thorough documentary research and discussions with experts in the field made it possible to identify a number of innovative dimensions suitable for use in training the groups concerned.

We shall now look at a number of these training dimensions that are used throughout to complement the instruction involved in training stricto sensu, and to create the conditions motivating trainees to persevere in their training.

In the first place new strategies are needed for publicising and recruiting. Approaching people and inviting them to take part in training should be preferred to issuing formal communications or summonses. Excessively rigid and exclusive selection criteria are not appropriate for dealing with more difficult situations. It is also to be hoped that a prior analysis of training needs and interests conducted jointly with client groups will contribute to their greater perseverance.

It is also important to analyse the needs of the labour market so that the motivation and interests of potential trainees can be directed to suitable areas of training with a view to achieving higher job placement rates.

Care must be given to the way in which people are received. Their first contact with an organisation should be used to provide educational and career information, possibly leading on to retraining for which assistance is available. The aim should be to find the most suitable solution for each case, while continuing the process of analysing needs and interests. Trainees should be involved in designing an initial training programme (this process should continue as training progresses) and in defining a set of

objectives and the roles of the various agents involved.

When working with socially disadvantaged groups it is important to bear in mind that every type of experience can be a source of skills. Knowledge and skills acquired through work or personal and social experience (with family, at school, in leisure time etc.) may be recognised, validated and possibly certified using a series of procedures that go to make up the skills audit. This method basically works towards three objectives, which may or may not complement one another.

1) - A skills audit helps a person to identify his knowledge and skills so as to be able to draw up a career plan which he is then responsible for pursuing. The organisation performing the skills audit may act as mentor and support by mobilising the necessary means, whether educational, training, financial, logistic, administrative etc. The ultimate aim is to help the person get to know himself better, discover his personal and occupational abilities and aptitudes and draw up a plan for life.

2) - The skills audit may also mark the start of a process assisted directly by the body performing the audit. In this case it will serve as a guide in that it will enable a diagnosis to be made of the training needs justifying the action. Bearing in mind that the skills audit focuses on the person and his particular history, it should as far as possible lead to a personalised form of training specifying the areas and forms of training in each case, thus permitting training to be organised in line with individual needs so as to benefit the individual concerned and enhance training efficiency.

Finally a skills audit may constitute an important tool for validating and certifying skills acquired informally, whether in a work environment or in other ways.

Particular importance should also be given to the analysis of basic needs so as to help trainees identify and solve any personal or social problems they may have; these, while not strictly related to training, tend to hinder their learning and skill acquisition. An analysis of this kind may be conducted in a more structured manner at the outset of training. Steps should be taken to to build trust between trainees and trainers so that the team is aware of any problems throughout the training period.

Among the new training dimensions, particular emphasis should be placed on follow-up during and after training. Since work-based training may sometimes be a person's first experience of incorporation within an organisation - an experience that is often foreign to the life and mentality of disadvantaged groups - individual and group follow-up takes on particular importance for the team: it provides an opportunity for observing both individual and group dynamics, and brings training into line with individuals' objectives and expectations (and vice versa).

This should be a psychosocial process using empowerment strategies to encourage trainees' involvement and their growing independence in solving their personal, social, learning, integrational or other problems. This approach may complement the social and cultural training component or constitute an alternative to it.

Follow-up should continue after training, on the assumption that once training has been completed it is desirable for trainees to find work. This calls for active job-seeking, coupled where possible with contacts with potential employers and negotiating work placements for trainees. Active partnerships should be established with local firms and other bodies that are willing to lend assistance with training, particularly to meet basic needs or for social and occupational integration.

Method

Since the object of our study was to identify emerging profiles for trainers in conjunction with training dimensions considered appropriate for disadvantaged social groups, it seemed to us that research using the case study method might provide a better answer to the inevitable questions of what should be done and why.

In order to formulate a more concrete objective, it was decided to choose five training projects from among a wide variety of training environments. It is not difficult to understand that even when concerned with combating social exclusion, different training bodies and projects may vary in terms both of the type and personal circumstances of groups targeted and of their training di-

mensions. Our choice was therefore governed by a number of criteria, selected with a view to ensuring a degree of diversity in the cases being studied.

We therefore had to seek out cases of:

❑ projects targeting different types of socially disadvantaged groups;

❑ projects using different dimensions prior to, during and after training;

❑ projects involving new types of trainers;

❑ projects conducted in different geographical areas;

❑ projects funded by the European Union.

The choice of projects and trainers for case study purposes was made using the information gathered in the course of meetings with people responsible for GICEA (the managers of Youthstart, Now and Integra), an INOFOR operational programme for the integration and accreditation of training bodies who are familiar with the training available for socially disadvantaged groups.

The choice of interviewees for the case studies was not a random one; it was guided by the wish to link the project coordinator's overall view of the training project with the more nuanced view of those involved in specific areas of training. We therefore drew up an interview guide for the project coordinator of each of the projects chosen and another for each of the trainers being studied.

The choice of interview topics was based on theoretical and expressly formulated characteristics. These were then confirmed in conversations with the trainers themselves, who were questioned along lines suggested by certain literature, experiments and team discussions. More specifically on the objective of the study, they were asked what they did and what they thought about a certain training process in which they were actively involved. The interviews, therefore, did not follow a completely open model; at first they used a semi-structured model in order to 'lead the interviewees to think more deeply or consider a new point that they would not have raised spontaneously' (Albarello, et al., 1997, p.110).

New trainer profiles

Broadening the concept of training implies expanding the actual training team so as to diversify trainers' functions (Nunes, 2000). This means identifying new profiles for trainers and others working in the areas of personal, social and occupational development of socially disadvantaged groups with a view to their social integration and employment.

The case study method was used to identify and analyse a number of innovations connected with the training of socially dis-advantaged groups.

We were this able to draw up occupational profiles for the trainers concerned on the basis of the method used by INOFOR in Portugal to produce standard descriptions for the various sectors of activity([1]).

Profiles were drawn up on the basis of the work performed by each person. The skills involved were broken down under the three headings of knowledge, technical knowhow and social and interpersonal skills. This enabled us to include theoretical knowledge, occupation-related skills and behaviour and attitudes towards others and towards work.

The information thus obtained was designed mainly for the use of professionals concerned with the training of the socially disadvantaged for the training dimensions and/or people involved in these projects([2]).

The following are the types of trainer selected for the innovation case studies, the organisations in which the trainers work and the functions they perform.

a) - Skills auditor (ANOP - National Association of Planning Offices)

A skills auditor acts as a facilitator and is tasked with encouraging and developing clients' self-esteem and self-regard, offering the assurance needed for them to exploit their capacity for initiative. He also assists and accompanies trainees throughout their training, maintaining a presence that structures the relationship with the other members of the training team.

Auditing is carried out at the start of the training process and comprises three stages:

([1]) Through its 'Skill development and analysis of training needs' programme INOFOR draws up nationally valid standard descriptions for the different sectors of activity which illustrate the way in which skills are developing and serve as an aid in the analysis of training needs and how training should be reoriented: Suleiman, F; Morais, M.F.; Fernandes, M.M. *Estudos Sectorais Perspectivos: Manual Metodológico*. Lisbon: Instituto para a Inovação na Formação, 1999.

([2]) The profiles for skill auditors, training technicians for in-service follow-up, mediators, personal and social development teams (psychologists and social service, development and job placement technicians will be found in the form described in the study on which this article is based (*Emerging training profiles for trainers working with socially disadvantaged groups*, INOFOR, 2002).

(1) initially the nature of the client's request is clarified with him. He is then told how the audit process will be conducted and the various procedures involved, as also those of the Planning Office. This stage ends with the signing of a contract setting out the objectives to be achieved on the basis of the request, and the roles and responsibilities of the two parties (trainee and auditor);

(2) the next stage is a thorough study of the client's personal and occupational career to date with a view to determining his aptitudes, motivation, interests and personal/work values;

(3) finally the client, with the auditor's assistance, produces summary documents setting out the most important findings of the study in systematic form. Of these, the personal and occupational dossier contains information relating to the client's personal and career background and any documents making clear the knowledge and skills he uses that are not shown in any certificate and possibly not even recognised by the client himself. This summary document contains all the information used during the audit.

The skills audit is conducted partly on a one-to-one basis and partly in groups. The one-to-one sessions enable trust to be established between the client and the auditor. They also provide an opportunity for the client to become aware of, and think more deeply about, aspects of his past and his personal life, thus enhancing his self-knowledge and ability to manage skills. The group sessions, on the other hand, are essential for the interchange of experience, ideas and feelings that is beneficial both in terms of training and of creating an esprit de corps. This is a process which develops (and permits individual development) at a gathering pace: individual sessions are used to reflect and consolidate the individual's thinking, while group sharing, confrontation and a collective synthesis in turn contributes to further reflection and consolidation.

b) In-service training follow-up technician (ASPD - Portuguese Solidarity and Development Association)

This person's role extends throughout the entire training process, in all training dimensions and in all training components. Essentially, however, his work centres on accompaniment and follow-up, and the social and cultural training which this involves. The purpose of follow-up is to encourage the development of personal and social skills and to organise and exploit the possibilities of learning in the workplace. There are two types of follow-up.

Psychosocial follow-up takes place in weekly group-based sessions and involves a weekly stocktaking in terms of employability, guidance, and a collaborative solving of personal problems. Use is made of various tools and techniques for enhancing self-knowledge and knowledge of the environment (lists of interests, life history) and training management (diary, guidance, and skills auditing tools).

Trainees' career plans and employability levels are studied and discussed, beginning with such aspects as application, punctuality, and relations with superiors before proceeding to specific questions about training. Each trainee's progress is assessed and considered, starting from the trainee's account of needs and difficulties. This account is based on a diary in which the trainee records the week's events at the training location and elsewhere. Other tools and techniques are also used, all designed to encourage group confidence and experience-sharing: group dynamics, mutual help, personal histories, 'progress report' etc. Sessions devoted to specific subjects and study visits are also organised for social and cultural training purposes.

Psychosocial follow-up also involves individual follow-up of trainees in order to identify and help solve any personal problems (such as physical health, psychological problems connected with unemployment, behavioural disturbances, difficulties in relating to others, or isolation) and social problems such as a shortage of money, insecure housing accommodation, illiteracy, and the need to regularise official records. Many of these problems are raised at the weekly group stocktaking sessions when reflect-ing on the week's events in a personal or training context. Another form of follow-up, namely teaching follow-up also takes place weekly in order to assess trainees' technical and interpersonal skills as demonstrated at their work-based training location. The follow-up technicians make contact with firms on a weekly basis in order to set train-

ing objectives, receive reports of work done, define the skills profile to be acquired, seek work placements for trainees, inform those responsible of the incentives available for those offering employment contracts etc.

c) Mediator ('Youth Mill' Cultural Association)

In this project the mediator undertakes the psychosocial follow-up of young people at their workplace, in their families, with the training team and with other local people involved. This is conducted at three levels. An informal individual follow-up takes place, for example during breaks, over lunch and in trainees' leisure periods when the mediator uses conversation to strengthen his relationship of confidence with them and to give them any help needed in solving personal, family or educational problems. He assists them in communicating and dealing with local authorities and contacts their families in order to provide explanations or ask for help with the young person's difficulties. He also takes part in group activities such as classroom discussions on given subjects and exercises in self-expression that offer an opportunity for him to get to know the trainees as a group and when necessary resolve conflicts between them or clarify matters connected with the course. Finally, he facilitates contact with other members of the team and with local bodies, with whose procedures he needs to be familiar in order to provide trainees with help when necessary.

d) Personal and social development team (CESIS - Centre for Social Action Studies)

The role of the personal and social development team extends throughout the entire training process with one or more of its members involved in every training dimension as well as the social and cultural component.

It is mainly concerned with follow-up and social and cultural training. This component is referred to as the 'Personal and Social Development' or 'Social Skills and Future Prospects' programme and is conducted by the psychologist and social service technicians and by specially invited outside trainers in sessions dealing with a variety of particular subjects such as the training contract, trainees' rights and obligations, health, child rearing, family planning (for adolescent males), personal appearance and presentation, access to the minimum guaranteed income, access to work etc. Treatment of such subjects is supplemented by a follow-up of female trainees throughout the training process, since it is essentially during group sessions that a friendly relationship can develop between trainers and trainees which encourages confidences and discussion of specific problems. These can then be dealt with during individual follow-up sessions.

Follow-up is essentially psychosocial and organised in such a manner as to encourage acquisition of the personal and social skills needed for successful social integration and job placement. It takes the form of weekly stocktaking sessions with female trainees in order to assess their progress as regards learning, interpersonal relations, degree of satisfaction, suitability of content, personal problems, basic needs etc. These sessions function as an open space where questions concerning trainees' adaptability to the group, to work and to society are discussed. They allow personal problems to be brought to light via the subject under discussion; their expression enables the team to help the trainee(s) find a solution. At the same time, individual follow-up strategies can be devised either by the psychologist (who is concerned with personal skills and can give specific advice or psychotherapeutic guidance away from the place of training); by the social service technicians who provide specific information concerning the rights of trainees and how best to go about obtaining them; or by the development technician, who is able to assist in matters connected with the family, living accommodation, the health and education of children etc. Every female trainee is free to approach any technician informally with a request for help with a specific problem, particularly the person with whom she feels the greatest empathy. The team then decides which technician is best qualified to cope with the particular problem.

e) Job placement technician (CRIS - Centre for Social Integration)

The job placement technician's work chiefly involves working with trainees in finding solutions to their problems so as to permit their personal development and encourage learning. In this way, trainees are prepared for work experience while their integration into the social and work environment is as-

sessed and monitored. The technician also encourages firms to offer work experience opportunities and prepares them for the task.

Job placement follow-up occurs at three levels. The technician begins by gathering information on each trainee in collaboration with the rest of the team, especially the technical trainers and mentors. This process continues throughout the period of training. The information assembled is used as the basis for preparing a trainee for her interview with the firm. This is done informally, chiefly by making the trainee aware of what he can expect, how he should conduct himself, which values are important in the work environment, how he should present himself to the firm and how he should react to initial difficulties in adjusting to work and to people (low output, possible criticisms from fellow-workers, etc.). To this purpose, job interviews are simulated. The job placement technician accompanies the trainee on the first day of training if he does not seem able to cope alone.

The technician also works with the firms willing to accept trainees for work experience and visits them regularly, learning as much as possible about their operations, their production system, corporate culture, working atmosphere etc. She seeks to establish close contacts with employers, using arguments and language appropriate to each situation. Having compiled a list of firms on the basis of general knowledge and, frequently, information from other employers, she visits the firms and then selects only those that display a genuine interest in training and employing the young people. She draws up training agreements with firms for varying periods (generally three months), during which time their progress is monitored by CRIS. Trainees are not paid during their period of work experience. If the firm is benefiting from a trainee's work the technician suggests some form of remuneration, but makes no demands in this regard.

Finally, work experience follow-up is informal and occasional. The technician only intervenes when problems arise; she avoids putting small and medium-sized enterprises under too much pressure by asking them to conduct assessments, since this is likely to prove counter-productive. The assessment made at the end of the period of work experience involves completing an assessment form which is the same as that used by CRIS in cases of direct job placement. Often an employer will offer the young person a contract before the expiration of a period of work experience. Follow-up ceases once a contract has been signed, but can be resumed at any time if the former trainee approaches CRIS with a request for a new job placement.

Conclusion

The procedures which take place at the start of training (publicising, recruitment, selection, induction, vocational or occupational guidance and skills auditing) as well as procedures that accompany or follow training (analysis of basic needs, follow-up and assessment of trainees and training) are fundamental aspects of the training practices of projects under study relating to socially disadvantaged groups.

Special importance is accorded to training follow-up, which has proved vital in working with the socially disadvantaged. Despite the different methods employed used, there was general agreement as to the following principal objectives:

❑ activating or reviving skills on the basis of the knowledge of the groups targeted;

❑ creating a relationship of empathy starting from a holistic personal approach;

❑ using a mixed individual and group-based follow-up strategy;

❑ pursuing follow-up actively on the basis of project methods;

❑ mobilising and managing locally available resources, i.e. other staff working in different areas, partner bodies in favour of meeting basic needs, employers' organisations, firms offering training vacancies, etc.

Despite their involvement in more general procedures, the trainers examined in the study are only responsible for a few aspects of training; the need to introduce new forms of training leads to the emergence of trainers with new functions. What was found to be of fundamental importance in the case of training for the socially disadvantaged, therefore, was to devise, on the basis of

new training needs, new forms of training organisation, leading to new types of trainer.

We believe that the trainers chosen for this study cover functions that will prove increasingly important in this field.

Our observation and description of each of the profiles inevitably took us beyond specialist-skill trainers to those concerned with greater versatility and flexibility, whether as individuals or as members of a team. Similarly, we no longer regard basic education and vocational training as all-important for skill-building but take greater account of the skills that come with experience of life. In every case the fundamental importance of social and relational skills emerges as preeminent.

Social and relational skills

❑ Showing enjoyment and physical and mental investment into employing one's skills.

❑ Demonstrating an ability to communicate.

❑ Demonstrating an ability to adapt to situations and individuals.

❑ Demonstrating creativity and initiative in solving difficulties.

❑ Demonstrating ability to criticise self in personal and work matters.

❑ Demonstrating an ability to empathise with others.

❑ Demonstrating an ability to work in a team, to accept new ideas and use them as a means of solving problems that arise.

❑ Providing evidence of self-confidence and independence in one's work.

❑ Showing common sense and openness to social problems both local and national.

❑ Showing general interest and curiosity.

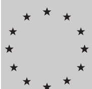
❑ Showing readiness to enter into dialogue and establish relations with firm managers.

❑ Giving evidence of human qualities such as idealism, solidarity, application to work, persuasiveness and patience.

It is particularly important to understand these groups and the kind of problems they have using the concept of empowerment.

While pursuing and disseminating these trainer profiles it is also important to remain aware of the emergence of new practices and procedures which complement training processes. We should also be aware that the new types of trainers are a response to real social needs, particularly of the socially excluded, whose problems call for urgent and effective action. Attention should also be given to the practice and ideas of private bodies, such as non-governmental organisations. In our study we found that such bodies have room for manoeuvre in designing and implementing strategies and methods to meet the needs observed in the field. High priority should therefore be given to a continuing in-depth dialogue between those responsible for government action and the representatives of civil organisations that aim to meet the training needs of socially excluded groups. Our study also sought to pursue this objective. The result was the product of joint reflection by all the partners and the synergy generated by the different tasks and characteristics of each body - INOFOR as a government institution charged with vocational training research, and the other experienced partners inside Portugal and beyond, who give much thought to practice.

It is, therefore, clear in our minds that private bodies, while retaining their autonomy in the choice and development of new methods, could benefit from longer-term support in addition to funding from the EU. This would allow them to remedy the weakness or even lack of continuity in their activity and the instability of their technical resources, which lead to a loss of their organisational and technical knowhow. But it is also very important that government bodies such as INOFOR should remain in continuing dialogue with organisations that are close to the field and which can contribute examples of good practice. Finally it should be point-ed out that a reflective and practice-orient-ed dialogue of this kind is already becoming a reality. Recent official initiatives seeking to remedy some of the weaknesses referred to are already putting the experi-



ence and ideas gained by small private organisations to good use in their work ([3]). Such interact-ion cannot fail to be fruitful and work to the benefit of the socially disadvantaged.

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([3]) To quote just one example without disparaging the many others: the educational and training courses for adults run by ANEFA are considering bringing in an initial process of recognition and validation of prior experience; their team of technicians includes a mediator.

Special needs students in vocational education and training in Norway - A longitudinal study

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In Norway almost all young people start upper secondary education. This means that the student population in upper secondary education is very diverse and many of the students have difficulty completing their education. This applies not least to the tenth of the students entitled to special educational provisions. This article is based on a longitudinal study in which special needs students were followed for four years through their upper secondary education. The study focused on students taking vocational courses, documenting how many students were on schedule at different points in time, how many were falling behind and how many had dropped out. An analysis was also performed to find out which conditions help vocational students to achieve a qualification. The conclusion was that making special provisions within the framework of mainstream classes rather than in small groups or special classes is a decisive factor in whether the students achieve a qualification.

Introduction

Since the sweeping reform of upper secondary education in Norway in 1994 all young Norwegians have been entitled to 13 years' education (cf. Skårbrevik and Båtevik 2000:16 -17). Children start school at the age of six and complete ten years of compulsory education at primary and lower secondary levels. They then have the option of three years at upper secondary level. Students with various kinds of problems of a physical, psychological or social nature are entitled to special educational provisions, and may therefore receive an additional two years of upper secondary education.

Young people avail themselves of this entitlement. Approximately 95% of lower secondary school leavers start upper secondary education in the autumn of the same year. Almost one tenth of these - approximately 6 000 - are special needs students, the overwhelming majority of whom start on vocational training courses. The question, however, is how these students fare in upper secondary education: How well do they flow through the system? What kinds of special provisions result in the best qualification for those receiving special needs education?

These problems will be discussed in this article, which is based on a longitudinal study of special needs students who started upper secondary education in the autumn of 1995. *Reform 94 - særskilt tilrettelagt opplæring* (Reform 94 - special needs education) was funded by the Norwegian Ministry of Church, Education and Research, and was carried out by Møre Research and Volda University College in the period 1995 - 2000.

This research project started out as an evaluation of the major restructuring of upper secondary education that took place in 1994 - a package of changes known collectively as Reform 94. The main purpose of this reform was to increase flow through the educational system. Among other things, this entailed a structural reform of the courses offered. The number of foundation courses was reduced from 109 to just 13 (subsequently increased to 15) and the degree of specialisation in the advanced courses was reduced considerably. Courses of study that did not lead to any vocational qualification or qualification for admission to higher education were discontinued. This had the greatest impact on the half of the cohort studying vocational subjects, since the main model following the reform was one of two years' education in school followed by a further two years in an external educational enterprise.

These measures have definitely been instrumental in helping more students to achieve a vocational or higher-education admission qualification. This becomes obvious when we compare the admission cohort of 1991 with the reform cohorts of 1994 and 1995. According to Støren and Skjersli (1999:109) this improvement is due to an increase in the number of places and a better course-offer structure. The fact that the students now have a statutory right to upper secondary education is also important.

The progress made is confirmed without doubt if we look at whole cohorts through comprehensive registration studies. The situation is less clear in the case of sub-categories that are difficult to identify in such studies. Special needs students are an example of such a category.

The empirical data in the article have been obtained from a sample of special needs students from the 1995 admission cohort, i.e. the second cohort of students following the implementation of the major educational re-

forms. The flow through the system and achievement of qualifications is described for students who started upper secondary level vocational courses, which is where we find most of the special needs students. This applies to almost three quarters of the students in the study on which this article is based. One eighth of the students started courses which would prepare them for higher education studies, while an equal proportion received unspecified special education without reference to any specific course of study. The latter are those with the greatest functional difficulties.

A life-course perspective on special needs education

In order to understand the flow through upper secondary education, it was decided that life-course theory and social transitions should be used as the framework. These are particularly useful perspectives when studying people who are out of step with the great majority in their journey through the educational system.

The term life course refers to the biological ageing process. But this is just one aspect. In the social sciences, life in society is the focus of attention. Individual life courses are influenced by past events and actions and by present framework conditions, and can often be understood on the basis of future expectations. A life course may be viewed as the sum of those trajectories, for instance in education, work and family life, which individuals and groups follow through frequently changing contexts. Different aspects of life-course theory are reviewed in Settersten (2002) and Elder and Johnson (2002). Hagestad and Dannefer (2001) are also adherents of the same life-course tradition. What is special about their contribution is that they warn against excessive focusing on agency perspectives in life-course studies at the expense of structural perspectives. In their view, this can lead to undesirable microfication.

A life-course approach combining an agency perspective and a structural perspective forms the theoretical basis for the research project which provided the empirical data for this article. This is elaborated in Kvalsund and Myklebust (1996), who outline an approach to life-course research which clearly distances itself from pure structural focusing and extreme agency orientation. In this perspective there is room for individual agency within the limits set by structural constraints.

A life-course perspective is fruitful when analysing the long lines followed by individuals and cohorts through varying geographical environments and shifting historical contexts. A life course, however, evolves not merely in the long term but also in the short term, in which case transition is the most useful concept. This concept is particularly helpful in flow studies since students' problems often come to light when they drop out or fail to move up to the next level at the normal time. The problems of special needs students often manifest themselves in their inability to keep up with their peers - the transition comes at the wrong time (off time).

A course of education typically forms a chain consisting of a series of transitions. Examples of these are leaving lower secondary school, starting upper secondary education and progressing through upper secondary school. It may, however, also be a question of dropping out, which for some may mean a transition to work, but for most will mean unemployment. Dropping out may be influenced by exclusion factors in the school environment or motivated by more attractive provisions outside school. The actual dropping out is, however, often preceded by a long process during which the drop-outs gradually distance themselves from school. Blaug (2001:40) expresses this as follows: ‘they are not so much drop-outs or push-outs as fade outs’.

Norwegian research into dropping out among special needs students in upper secondary education emphasises the same point. Myklebust (1999: 173) documents that two thirds of the students who rejected offers of special provisions in their first six months, had left the upper secondary education system by the end of the third year. There is also a marked tendency for those with high rates of absence in the first six months subsequently to turn their backs on upper secondary education. It may thus be said that partially distancing oneself from school in the initial period gradually develops into total rejection, as a result of which a final break is made.

With regard to upper secondary educa-

tion, dropping out of a course of education is an external transition. There are also internal transitions. A typical example is moving from one course level to the next, for example from a foundation course to a more advanced course. This may be called a vertical transition as opposed to switching to a different course of study at the same level, which is a typically horizontal transition.

Method and material

There are good reasons for employing a longitudinal research method. Longitudinal data are required when studying careers, for instance with respect to training or occupation. It is important to note that prospective designs, where the same individuals are followed forward in time, are particularly well suited to the study of social transitions. The follow-up studies in the ***Reform 94 - særskilt tilrettelagt opplæring*** (Reform 94 - special needs education) are therefore largely prospective.

It is easiest to study flow through the system when one particular cohort is used as the starting point. We have chosen to follow the autumn 1995 admission cohort in six counties: Finnmark, Rogaland, Oslo, Møre og Romsdal, Nord-Trøndelag and Hedmark. (In the three latter counties we also have information about the 1994 cohort, but these data will not be used in this article.)

In the first data collection round in the spring of 1996 we used a detailed questionnaire to obtain information about 438 special needs students who had started vocational courses in 1995. We then received information from the schools about these students up to the spring of 1999, in five more data collection rounds. The table below is a schematic presentation of the data collected([1]).

Statistics obtained from the six counties indicated that we fell far short of receiving information about all the special needs students in the 1995 cohort. We therefore sent a simplified questionnaire to the schools and requested that its completion be given higher priority than previously. This resulted in information about a further 581 vocational students from the 1995 cohort for whom special provisions had been made at the end of the first school year. These students are in addition to the 438 about whom we had already received data. The total of 1019 is assumed to include nearly all special needs students who started at upper secondary school in 1995 and who were still in upper secondary education at the end of the first school year. Response in the follow-up study was only 43 per cent. In view of this it is important to know whether the material is biased and, if so, how.

Figure 1

Outline of the data collection method for the 1995 admission cohort

Autumn 1995	Start upper secondary education	
Spring 1996	First school year	Wave 1
Autumn 1996	Second school year	Wave 2
Spring 1997	Second school year	Wave 3
Autumn 1997	Third school year	Wave 4
Spring 1998	Third school year	Wave 5
Autumn 1998	Fourth school year	
Spring 1999	Fourth school year	Wave 6

There are two variables that can be compared directly for both the follow-up and the total material, namely gender and class type. The gender distribution is approximately the same in the follow-up sample and population - about 65% are boys. Students attending mainstream classes all or part of the time are, however, underrepresented in the follow-up sample. The reason for this is that this sample has a degree of overrepresentation of students with severe functional problems, who are more often placed in special classes. These factors should be taken into consideration when evaluating the results of the study. Kvalsund and Myklebust (1998) describe the data collection in more detail and present a thorough assessment of the representativeness of the complete follow-up material, in which also special needs students taking general studies and those following unspecified courses of studies are included.

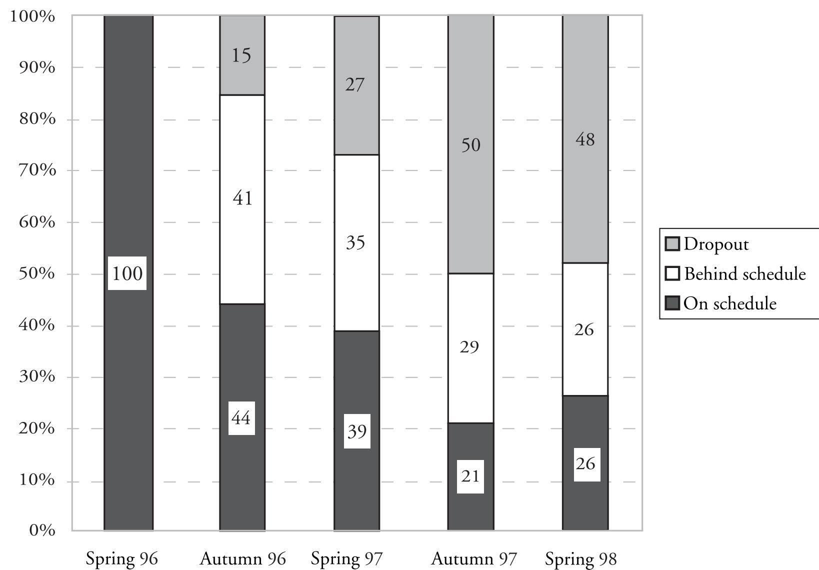
Flow through the system

A given pattern of progression at a specific point is the sum of all the individual adjustments for and choices made by the students. Through a series of transitions - in-

([1]) The registration continued after the schools had submitted material for the last time in the spring of 1999, but current work is being financed mainly by The Research Council of Norway. The students and their parents have been interviewed, but these data will be reported in future publications.

Figure 2

Progression from spring 1996 to spring 1998 for special needs students who started upper secondary vocational courses. The 1995 admission cohort in six Norwegian counties. N=438



ternal and external, horizontal and vertical - specific patterns are created, which, in this research project, have been registered every six months. Here, we shall only briefly document the progression from the first to the third year of upper secondary school. We shall note the proportion of the cohort whose educational progress is on schedule, the proportion that has fallen behind and the proportion that has dropped out. This is not the place to document detailed flows between different levels and different courses of study. Nor is the relationship shown between dropping out and subsequent return to upper secondary education. It is however important to remember that many of the students change courses, which means that flows are not only in one direction.

We received data on these students for the first time in the spring of 1996, when they were taking the foundation course in one of the vocational study programmes. At that time they were, by definition, on schedule in their education.

However, many of these students had already had substantial problems at the primary and lower secondary level, and the problems continued in the first year of upper secondary school. It is therefore no surprise that the figure below shows that a large number did not progress to the first level of the advanced course when they started their second year in the autumn of 1996.

In the autumn of 1996, half-way through the second school year, less than half were on schedule, two-fifths were behind schedule and almost a seventh had dropped out. The situation worsened, with an increasing incidence of students dropping out and a smaller percentage on schedule, up to the autumn of 1997. There was, however, some improvement during the third year, when a greater percentage were on schedule in their education. This was due to a considerable incidence of students returning to education after a dropping out for a short time. At the same time there was a somewhat smaller flow from behind schedule to dropout.

We see therefore that vocational students with special needs often fail to progress satisfactorily and many drop out of upper secondary school education. It must, however, not be forgotten that previously this type of student received little education at this level. Nor do all ordinary students progress straight through upper secondary school. Thus in Norway only around two thirds of the whole admission cohort from autumn 1994 were on schedule at the end of the third school year (Edvardsen et al.1998: 83). However, there was a great difference in this cohort between students pursuing different types of studies. More than 80% of those pursuing academic studies were on schedule, while the same applied to only 52% of vocational training students (Støren, Skjersli and Aamodt 1999: 77). Of the students leaving lower secondary school in spring 1995 and starting upper secondary school in the autumn of the same year, only 58.5% completed and passed the courses in the normal time (Statistics Norway 2001). We should always bear this in mind when assessing the performance of special needs students.

Qualification attainment after four years

So far we have seen how various transitions throughout a course of education form definite patterns of progression in a cohort of vocational students receiving special needs education. We have seen what proportion

is on schedule after three years, what proportion is behind schedule and what the proportion of dropouts is. The qualification status of these students the following year can be summed up as follows:

Four years after starting upper secondary school, we note firstly that almost half (45%) of the 1995 cohort left school without our being able to determine with any certainty whether they obtained qualifications, and secondly that over a third (37%) are still in upper secondary education. However, special needs students are entitled to up to five years upper secondary education. Therefore, most certainly more students will eventually complete their education with some form of qualification. Furthermore there are 6% who have received a certificate of qualification (partial qualification), i.e. the students have passed some subjects, but not all.(2) Just over 12% of vocational students obtained a vocational qualification within the normal time of four years, and barely 1% obtained the entrance qualification required for higher education. However the really interesting question here concerns the conditions that contribute to qualification attainment. That is the topic of the rest of the article.

What role does the students' functional level play for qualification attainment?

It is probable that the extent of the students' functional difficulties affects their chances of achieving a qualification. This is the first aspect we need to discuss. We will start with the first data collection in spring 1996, which gave an overview of how the class teachers and school counsellors assessed the various problem conditions concerning students with special educational needs. This survey provided us with insight into the basis for the special provisions for each pupil.(3)

These problems were registered using thirteen different indicators which encompass difficulties of a physical, psychological or social nature. Counsellors and class teachers placed each student in one of four categories - ranging from none to very great difficulties - for each of the problem indicators. The four categories for each indicator were explained in more precise terms in the registration form (cf. appendix in Båtevik, Kvalsund and Myklebust 1997). However, in the present analysis individual problem conditions are not used but rather an additive index, based on the thirteen indicators, as the measure of functional level.

This index can then be subdivided in different ways, for example into quartiles.(4) We then discover that there is a dividing line between the weakest quartile and the rest of the students. Students in the fourth quartile (those with the lowest functional level) are clearly worst, with only 6% of them achieving a qualification. In the third quartile 15% achieved a qualification, the result for the second quartile was 12% and for the first quartile (those with the highest functional level) 16%. Since there is hardly any difference between students in the three best quartiles, functional level is presumably not a decisive factor in qualification attainment.

What promotes greater qualification attainment - special or mainstream classes?

The purpose of special provisions is to help the students on their way through upper secondary education. It is therefore important to know what kind of provisions help to achieve this goal. The types of provisions for special needs students can, however, vary a great deal. Help and support may be given in mainstream classes, in groups of eight or groups of four, as individual lessons outside the class or remedial lessons within the class. A personal assistant or the use of various technical aids are also possible. These remedial measures can also be combined. This great variation is documented by Kvalsund and Myklebust (1998:62 - 64).

This diversity makes the picture rather vague when analysing the relationship between special provisions and qualification attainment. This article therefore takes one fundamental distinction as its starting point, namely whether special provisions in the first year were made exclusively within the framework of a mainstream class or whether they were made in various types of small groups. We then obtain two equally sized groups. Slightly less than half (49%) of the vocational students are provided for exclusively within the framework of mainstream classes while the remainder (51%) are provided for in other ways, primarily in different types of special classes. These groups also display very different degrees of qualification attainment.

Of the students for whom provisions are

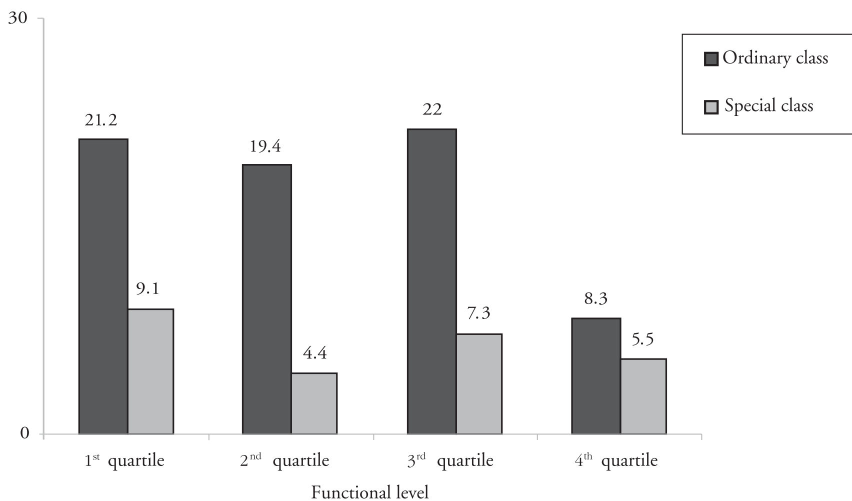
(2) The Norwegian system of qualification certificates is described in more detail by Skårbrevik and Båtevik (2000).

(3) However, we should bear in mind that a diagnosis is not an indisputable fact, but rather a vague indication of the problems the students have to cope with. It may often be a "thin description" (cf. Gillman et al. 2000: 396) based on fleeting consultations with experts. Moreover, it must be stressed that these diagnoses are often social constructs rather than objective categorisations (Kvalsund and Myklebust 1996:106). Such diagnosis is more a registration of what is lacking than a mapping of resources. It is unfortunate if classification becomes more important than prevention and treatment (cf. Parmenter 2001:274-275).

(4) The basis for the division into quartiles is not the 438 vocational students from the 1995 cohort but the total number of special needs students (760) included in the follow-up material from both the 1995 and the 1994 cohorts.

Figure 3

Percentage achieving a vocational qualification or the entrance qualification for higher education after four years. Distribution according to functional level and class type in the first school year. 438 special needs students starting vocational education courses in autumn 1995.



made exclusively in mainstream classes during the first school year, just over 19% achieve a qualification after four years. The corresponding figure for students for whom provisions are made in special classes is 6%. This is a marked difference and would seem to suggest that the greatest possible number of special needs students should receive help in mainstream classes. However, there are several factors that must be included in the analysis.

Control for other variables - are mainstream classes still best?

It would be easy to assume that the use of different types of classes is due to students with severe functional disabilities being placed in special classes and students with less severe functional difficulties in mainstream classes. And there is in fact a tendency to do this, but the difference between the types of class is not so great. Only about 60% of the students in the first quartile (with the least overall functional difficulties) attend mainstream classes exclusively. The same applies to 30% of the pupils in the fourth quartile. The pupils in both the second and the third quartiles divide almost equally between main-stream and special classes. The small extent to which functional level determines class placement may be due to several factors. Firstly, the idea of inclusion is considered important in many places, which means that provisions are made in mainstream classes for as many as possible, regardless of functional level. Secondly, demographic factors limit the number of special classes possible in each school. In addition, both diagnosis and class placement may naturally be somewhat random in individual schools.

This variation makes some interesting analyses possible. It allows us to compare student categories with almost the same functional level, but with different types of provisions. This comparison is shown in the figure below:

In the case of students at the lowest functional level (fourth quartile) it does not seem to matter much whether they are provided for in mainstream or in special classes. For the others, however, the class placement in the first year is crucial. At every functional level students for whom provisions are made within the framework of mainstream classes clearly fare best in respect of qualification achievement. However, before drawing the final conclusions, we must look at how other variables affect the interaction between functional level and class placement. The form of analysis best suited to this is logistic regression.([5]) The table below shows the variables included in the analysis:

Some of these variables have been presented earlier in the article. The new variables will be considered only briefly: Intensive measures are an indicator of help and support over and above placement in a specific class or group. The progression variable is relevant in this context because qualification is an end-product after many years schooling, in the course of which students from time to time move up a class, fall behind or drop out. This progression pattern is documented in figure 1. The chances of achieving a qualification must be greatest for those who at any given time are on schedule in their education, i.e. those who keep pace with students having a normal progression. Myklebust (2002) has thus shown that it is much easier to remain on schedule for those for whom all special provisions are made within the framework of a main-stream class. This variable has also been included

([5]) This form of analysis is most suitable when the dependent variable is a dichotomous nominal level variable, such as qualification attainment.

in the analysis in an attempt to avoid what Hagestad and Dannefer (2001:7) refer to as 'the time 1 problem', i.e. including independent variables from the first phase only in longitudinal studies. It is important to include the gender variable since the distribution among special needs students is biased, only a third being girls. On the other hand, the girls for whom special provisions are made have greater problems than the boys.

If we concentrate on the two columns on the right, we see that class type is the only variable to have a significant effect on qualification attainment after four years. The students for whom provisions in the first year were made exclusively in mainstream classes are almost three times (2.774) as likely to achieve vocational or higher-education qualification as those for whom provisions were made in special classes.(6) This also applies when we control for the effect of the four other independent variables using logistic regression.

Table 2

List of variables included in the logistic regression analysis.

Variable	Values
Dependent variable: Qualification achieved after 4 years by vocational students:	0. No vocational or higher-education qualification 1. Vocational or higher-education qualification
Independent variables:	
Class type 1st year:	0. Students for whom provisions are made in special classes 1. Students for whom all special provisions are made in mainstream classes
Functional level 1st year:	0. Quartile with the lowest functional level 1. Quartile with next lowest functional level 2. Quartile with next best functional level 3. Quartile with best functional level
Intensive measures:	0. No remedial measures other than group/class placement 1. One remedial measure 2. Two remedial measures 3. At least three remedial measures
Progression:	0. Not on schedule halfway through second school year 1. On schedule halfway through second school year
Gender:	0. Girls 1. Boys

Discussion and conclusion

Even if we control for other relevant variables the significance of class type is not lessened as regards qualification attainment by special needs students. Those for whom provisions are made exclusively in mainstream classes in the first school year(7) achieve a vocational or higher-education admission qualification more often than other special needs students.

These results are very similar to the pattern documented by Markussen for a sample of Norwegian special needs students who started upper secondary education in 1994. After controlling for social background, gender, diagnosis, primary and lower secondary school grades and age on starting school, the conclusion is that special provisions in mainstream classes gives the best results as regards qualification attainment (Markussen 1999:216). Similar findings have been reported from lower-level education in other countries, for example the Netherlands (cf. Karsten, Peetsma, Roeleveld and Vergeer 2001) and the USA (cf. Waldron and McLeskey 1998).

There is thus a great deal to indicate that far more students with functional difficulties achieve a qualification when special provisions are made within the framework of mainstream classes.

This can tentatively be explained by a so-called context stimulation hypothesis. The hypothesis postulates that the best qualification result will be achieved by special needs students in mainstream classes because in such classes they can more easily compare themselves with ordinary students. The group with whom they compare themselves, the reference group, consists of other pupils for whom qualification for a vocation or for higher education is the natural goal of the education. The class context will therefore stimulate the special needs students to perform better. If the reference group consists only of other special needs students in one small class, academic ambitions will rapidly fall off. Close teacher follow-up is therefore of little help in such classes. Blaug (2001:41) reasons along

(6) The result is the same if we use single indicators in the analysis - for example reading and writing difficulties - instead of an additive index for functional level. Students for whom provisions are made exclusively in mainstream classes are almost three times as likely to achieve a qualification as the others.

(7) The class placement in the first year has a great effect on subsequent placing. Approximately 90% of the special needs students in the 1995 cohort for whom provisions were made exclusively in a mainstream class in the first year continued in a mainstream class in the second year.

Table 3

How five independent variables influence the chance of achieving a vocational or higher-education qualification after four years. Special needs students who started vocational education courses in 1995. N=438.

	B	S.E.	Wald	Sig.	Exp(B)
Class type in 1st year	1,009	0,349	8,355	0,004	2,744
Functional level in 1st year	0,056	0,154	0,133	0,715	1,058
Progression halfway through 2nd year	0,519	0,327	2,511	0,113	1,680
Intensive measures in 1st year	-0,207	0,201	1,062	0,303	0,813
Gender	0,201	0,319	0,397	0,529	1,222

the same lines:

One thing learned from the famous Coleman Report ... it is that individual educational achievement is almost as much affected by the attitudes and achievements of other students in the class as by teachers, parents and general school resources.

Blaug (2001:42 -43) also argues against splitting the students into groups: '... anything which divides pupils in a school, particularly in terms of cognitive abilities, is virtually guaranteed to produce school failures.'

Grouping according to ability has gradually come to be regarded as a measure that creates inequality rather than levelling. Kerckhoff (1995: 483) is among those who claim this: '... grouping results in students in "high" ability groups moving ahead and those in "low" ability groups falling back in terms of academic achievement.' We thus achieve the opposite of what was intended. The manifest function is to create greater equality. But the latent function leads to a sorting that increases inequality. Kerckhoff supports his claim by referring to research in primary, lower secondary and upper secondary education.

This is an argument for inclusion in mainstream classes. The results presented in this article point in the same direction. The structural arrangements, such as placement in specific types of classes, seem to have a channelling effect that has a major impact on the qualification achievement of special needs students. An effective way of improving qualification is therefore to provide for as many as possible of the special needs students in mainstream classes. This will, however, also require the provision of greater resources for such classes.

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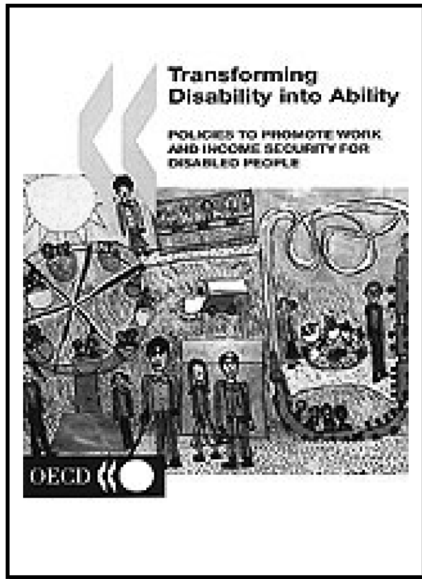

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Transforming Disability into Ability
Policies to Promote Work and Income Security for Disabled People

How OECD countries can reconcile the twin, but potentially contradictory, goals of disability policy has yet to be resolved. One goal is to ensure that disabled citizens are not excluded from society: that they are encouraged and empowered to participate as fully as possible in economic and social life, and in particular to engage in gainful employment, and that they are not ousted from the labour market too easily and too early. The other goal is to ensure that those who are disabled or who become disabled have income security: that they are not denied the means to live decently because of disabilities which restrict their earning potential.

This book provides a systematic analysis of a wide array of labour market and social protection programmes aimed at people with disabilities. Analysing the relationship between policies and outcomes across twenty OECD countries, it gives the reader a better understanding of the dilemmas of disability policy and of successful policy elements or packages. The report concludes that a promising new disability policy approach should move closer to the philosophy of unemployment programmes by:

- emphasising activation;
- promoting tailored early intervention;
- removing disincentives to work;
- introducing a culture of mutual obligations; and
- involving employers.

It finds that many countries' policies already include some elements which are important components in such a new approach.

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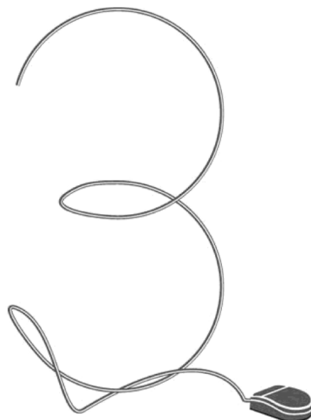

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Impact of the European Union on the vocational training system in Germany

European vocational education and training policy is subject to the guiding principle of subsidiarity. This forbids harmonisation and insists on consensus in policy matters on the basis of 'unity in diversity'. Against the background of globalisation and internationalisation of education, and particularly in the context of the debate about vocational education and training policy in Europe there are, nonetheless, increasing signs that this process of internationalisation, or at least of Europeanisation, is creating pressures on national VET systems. These pressures may not be easily defined or quantified, but they are forcing individual Member States to react to 'European' challenges. This analysis explores the opportunities and threats facing the German vocational education and training system as a result of this process.

Consideration of education and training in societies in transition of itself requires a broader perspective than when dealing with one country. The European context also provides too narrow a view of vocational education and training policy, which is closely influenced by conditions affecting employment systems. The effects of the process of European integration account for only some, possibly even the minority, of the influences governing national institutions. Hence, any discussion of transition focusing on vocational education and training policy which fails to look beyond the horizon of 'European unification' is incomplete in many important respects. I shall therefore examine first the outside influences which have a definite impact on the trend towards convergence of national structures.

Outside influences: modernisation, globalisation and internationalisation

The findings of modernisation theory

The term 'modernisation of vocational training' is without doubt one of the most common subtitles to appear in research on vocational education and training. However, modernisation is more than a fashionable label and when used as a technical term in the social sciences relates rather more closely to a theoretical context which was formulated in the European case by Stein-Rokkan (1972) and Peter Flora (1974) in the 1970s (see Münk 2000 for a full discussion). The key focus of interest of modernisation theory as a way of modelling specific types of social change is to illuminate processes of transformation occurring in similar ways in all modern societies, although not all at the same time. It is useful for analysis of the 'Europeanisation' of social structures because:

1. it is oriented towards past, present and future;
2. it emphasises the developmental and process-related nature of social structures;
3. it reflects the image of the modern industrialised society;
4. the logic of the development of industrial societies implicit in modernisation theory is potentially ubiquitous and hence inherent also in education and training systems;
5. despite the assumption of standard goals of development in industrialised societies, it demonstrates the structural inequality of these development processes in subsystems, both in internal systems of social action, and at the level of international and European comparison.

The premises of various types of modernisation theory are supported in large measure by sociological research into the structure of society. The results of research into social history (Kaelble 1987) reveal far-reaching convergence within Europe in family patterns, systems of employment, socio-cultural and urban environments, and the modern welfare state. Modernisation theory also points to developmental convergence throughout Europe at the level of social structure analysis (e.g. Hamm 1996, p. 52) and of a wide range of empirical evidence:

From the standpoint of social structure theory, the sociologists Hradil (1994, 1997) and Immerfall (1995), in particular, identify education and training systems, i.e. the implementation of mass education, expansion of education and training, and increased access for women to educational opportunities (Müller; Steinmann; Schneider 1997), as

key elements of modernisation, these developments in education being interpreted as proxies for 'common trends...of modernisation in a manner that is typical of Europe and which developed there historically' (Hradil; Immerfall 1997, p. 12 ff.).

Globalisation

While outside influences, i.e. external to and not governed by the nation state, are implicit in themselves in modernisation theories, this situation has become a commonplace through use of the term globalisation. For a long time, sociology has been concerned with the issue of 'globalisation of social structures' (Hamm 1986), and according to the sociological debate referred to above on the 'Europeanisation of social structures' (Immerfall 1995, Hradil 1997), more recent discussion inspired by social structure theory appears to be looking for opportunities to establish Europe as some kind of counterweight between the two poles of 'globalisation' and 'nation-state' as a separate intermediate category in order to clarify 'how federal and international institutions are changed by the presence of the third, European level' (Schäfers 1999, p. 3).

In respect of vocational education and training, Zabeck (1999) reflects on 'the concept of vocational education and training in the age of globalisation of markets and shareholder value' and speaks in this context of so-called 'universalistic challenges to vocational education and training as a result of globalisation and Europeanisation' (Zabeck 1999), which he perceives as inescapable real pressures. Lastly, Greinert (1999) last year also raised the potential question of 'globalisation as a threat to national vocational education and training systems', treating it (idem, p. 14 et seq.) in the context of:

❑ the reduction in the volume of employment in technical and productive industries and in primary services that is typical of industrialised societies;

❑ the shift in the principles of business management (cost controlling) [1];

❑ the changes in employers' demands for skills [2].

Internationalisation of the education and training debate

The term internationalisation of the education and training debate refers on the one hand to what has become more or less a global concept, the 'knowledge society' and its wide range of variants (OECD 1994, 1996, Unesco 1996 and European Commission 1996); on the other, there are increasing signs that, as it says in the German 'Education Delphi', 'the internationalisation of education...will increase considerably by the year 2020' and 'mutual international recognition of educational qualifications and compatibility between international education modules' will also rise (bmb+f/Bildungs-Delphi, 1998 p. 43). Kuwan is more specific about this prognosis, foreseeing 'internationalisation of vocational training' through 'new internationally recognised qualifications' and 'Europe-wide provision of training courses using alternance systems' (Kuwan 1998, p. 5).

This is of course also connected with considerations of national education and training marketing, and is driven by a certain enthusiasm for technology in the context of web-based multimedia approaches to teaching and learning. One of the policy outcomes of this discussion, as the debate about Bachelor degree courses demonstrates, has been to make the German national education and training system more international and to facilitate links with others. But regardless of the extent to which they are true, these forecasts also point to a trend of increasing links between national education and training systems in an international context. Such a prognosis leads to the obvious conclusion that new transnational ways of working are gradually being developed at the level of policy development.

It is only sensible to discuss the Europeanisation of the German national system of initial and continuing education and training against the background of these more or less world-wide considerations; and this intermediate European position reveals in fact that the economic and legislative integration of the European Union has gone a good deal further than the citizens of the Union may be aware: the German Confederation of Industry, for example (FAZ 25.8.97), estimates that at least 60% of legislation that is of relevance to industry now originates in Brus-

(1) Greinert (1999, p. 15) explicitly stresses in this context that from this standpoint in-company initial vocational training loses its character and its status as a social obligation, especially in major companies operating globally and competing internationally.

(2) Greinert (1999, p. 15) argues further that the implementation of new organisational principles is showing up two additional factors in a situation of global competition: 'one technical, aiming at as complete integration as possible of information and communication in productive activities and services, and one organisational, aiming at an effective system of flexible wealth creation and working processes (Schumann 1994). The German industry model of skilled workers based on the dual organisational principle is unsuited, because of its rigid demarcation between skills, to these new principles of organisation and management (Kern; Sabel 1994).' Furthermore, the dual system was and still is 'primarily a system of training for production jobs, and less for the service sector' (ibid.).

sels - and in agriculture, this proportion has even reached more than 90%.

In the light of such findings, the political scientist Hartwich (1998) believes developments already to have gone so far that he can detect a 'Europeanisation of the German economic system'. The same applies in the field of law: nation states may retain significant sovereign rights, but over half of national (German federal) legislation already comprises ratifying legislation (Reuter 1995, p. 203).

The influence of European policy

The process of integration that has evolved over more than 40 years was motivated by economic considerations, as the former term 'European Economic Community' suggests. The substance of this process of integration, from the European Economic Community (1957) to the European Community (1986), the European Union (1992) and the Union Constitution proposed by the European Parliament in 1994 ([3]), and the debate launched this year (2000) by the German Foreign Minister at Humboldt University about a European federation of nation states (Fischer 2000), is the outcome of a lengthy political and, as experience clearly suggests, controversial discussion between the states involved, the principal concern being economic interests. At first sight, the institutional implementation of the process of integration is a matter for the legal system. First, the multinational process of integrating a constantly increasing number of Member States must necessarily take place voluntarily, i.e. through political discourse, secondly, it must be by agreement on the basis of common economic interests and thirdly, it requires step-by-step regulation in individual states under European treaties.

Economic development as a goal of European vocational education and training

The priority goals of European integration policy remain the achievement of free movement of labour and the promotion of mobility. The driving force behind the European Economic Community was primarily economic ([4]) and influenced the view of the European Commission from the outset, the human resources approach even today forming the most important nucleus of the argument for the European formula of 'competition between vocational education and training systems' (Koch 1998). Given the interface function of vocational education and training, the exclusive interpretation of training as a 'human resource' and the implicit instrumentalisation of vocational training deserves criticism just as clearly as its one-sidedness from the perspective of vocational education (Lipsmeier 1991; Lipsmeier; Münk 1994), even though there can be no doubt as to the role of vocational education and training as a factor in competition and choice of location.

The history of European labour-market policy provides a telling example of the effects of economically-oriented EU policy strategies: while the issue of unemployment, especially among young people (Münk 1999) was an essential spur to the introduction of EU action and training programmes in the mid-1980s, as well as for other measures under secondary legislation, a turning point was reached by 1997 at the latest with the launch in the early 1990s of the 'European Employment Pact' (1999) (Piehl; Timmann 2000) in the wake of the Luxembourg Process, whereby an active European and national employment policy was made a maxim of Community action as a response to the increasing pressure of the problem of around 18 million unemployed. Consequently, this call by Member States for an active employment policy was enshrined in EU primary legislation in the same year, namely in Articles 125 et seq. of the Treaty of Amsterdam.

The 'multi-level strategy' of the need for collaboration between the national and the European level proclaimed by Delors in 1993 in the White Paper 'Growth, Competitiveness, Employment' is now evident and effective in active employment policy: not only does the annual summary of 'National Action Plans' (NAPs) provided in the 'Joint Employment Report' published since 1997 allow for constructive comparison of best practices in national competition policies, but the obligation on Member States to produce these outcome reports is also based on a benchmarking approach, which implicitly increases potential control and influence by

([3]) See the report of the Institutional Committee on the European Union Constitution (DOC-DE/RR/244403 PE 203.601 final); adopted by the EP on 10.2.1994; concurring report of 17.3.1994 from the Bundestag [12/7074]; cf. Reuter 1995, p. 203.

([4]) In the Community action of the European Union, this primacy of economic concerns has for decades led to a close and, from the point of view of vocational education and training, extremely one-sided link with economic and employment policy strategies. The European Commission has consistently supported this instrumentalisation of vocational education and training as a tool of economic and employment policy in all statements, most recently in the White Paper of 1996 (see inter alia the Commission Memorandum 'Vocational Training Policy in the 1990s' (1991), the White Paper 'Growth, Competitiveness, Employment' (1993) and the White Paper 'Education and training, teaching and learning: towards the learning society' (1995)).

the Commission.

Given the primacy of economic concerns, as demonstrated in particular in the European Employment Pact, it is very clear from primary and secondary Community legislation that despite the principle of subsidiarity vocational education and training in Europe is seen as a continuum with fluid boundaries, but with increasingly precise shared goals.

The legal framework of European vocational education and training

The stages in this process of gradual harmonisation of legislation have left very obvious traces in education and training policy, as in other fields, since 1957 ([5]). The fact that there is wide disagreement over whether the articles on education in the Maastricht and Amsterdam Treaties extend, confirm or reduce Community law does little to alter this state of affairs (Wolfgramm 1992, Richter 1993, Feuchthofen; Brackmann 1994).

The issue of the legal framework of European vocational education and training policy is therefore central to any quest for outside influences on national policies: the pillars of European law on education and training are: first, primary Community legislation (see above); secondly, the secondary Community legislation enshrined in regulations adopted by the EU institutions under the EU treaties; thirdly, interpretative rulings by the European Court of Justice, and fourthly, non-binding declarations by Community institutions of the EU, or 'soft law' (provisions adopted by the Council, of the Education Ministers and the Commission meeting in the Council). The boundaries, however, are fluid since the ECJ has frequently transformed these originally 'soft' agreements into binding Community law, as in the case of the action programmes initially established voluntarily (see Reuter 1995, p. 205).

There are legal rules of relevance to vocational education and training at all four levels: primary Community legislation already contained regulations governing vocational education and training before 1992, not merely implicitly in the form of the basic principles enshrined therein ([6]) but also explicitly in Article 235 which, while safeguarding the principle of subsidiarity, grants general powers to the Community which apply to education and training policy ([7]). Hence the EEC had powers over education and training policy even before the Maastricht Treaties, albeit in the limited sense of accessory competence in education (see Reuter 1995, p. 205), for which no separate field of educational action was constituted.

At the level of secondary EU law, on the other hand, there are very many ways of influencing education and training policy directly, in the form of directives, guidelines and decisions, programmes, recommendations, opinions and other statements (resolutions, conclusions and reports; see Schröder 1991), which vary greatly in the degree to which they are legally binding. The first direct intervention in vocational education and training in 1963 ('Principles for implementation of a common vocational training policy' of 2.4.1963 ([8])) illustrates the wide implications of the principle of dynamic extension of EC law, according to which positions on education and training policy are expressed without there being any provisions for the allocation of competence at the same time (see Reuter 1995, p. 206).

The significance of this consistent strategy, especially at the level of secondary Community legislation, is clear if it is remembered that the EU institutions have succeeded over the years in developing out of specific education and training responsibilities an 'independent field of policy, even though its structure of competence is unclear' (Reuter 1995, p. 207). These guidelines, memoranda, statements of principle and white papers which comprise EU education and training policy mark out the boundaries within which the national and international debates about education and training policy as part of the 'European cause' have taken place for years, especially among the specialist community ([9]). It would also be hard to overestimate the significance of the education and action programmes also launched under secondary Community law (Müller-Solger 1993, Münk 1999). Although the legal basis of the pronouncements made at this level of secondary legislation is generally unclear, and the regulations themselves have no legally binding impact, they have without doubt driven and, usually at least, polarised European discussion of policy.

([5]) These are: the Treaties of Rome (1957), the Single European Act (1986), the Schengen Agreement (1990) and the Treaties of Maastricht (1992) and Amsterdam (1997).

([6]) These are the prohibition of discrimination (Art. 7), freedom of movement for workers (Art. 48), freedom of residence (Art. 52) and freedom to provide services (Art. 59).

([7]) Article 235 of the EEC Treaty reads: 'If action by the Community should prove necessary to attain, in the course of operation of the common market, one of the objectives of the Community, and this Treaty has not provided the necessary powers, the Council shall, acting unanimously on a proposal from the Commission and after consulting the European Parliament, take the appropriate measures.'

([8]) 'Principles for implementation of a joint vocational training policy' of 2.4.1963. In: OJ C 1388/63.

([9]) In the late 1980s these were, for example, the medium-term outlook for 'Education in the European Community 1989-1992', the medium-term guidelines 'General and vocational education 1989-1992', the Commission memoranda on higher education and vocational education policy in the early 1990s, the White Paper 'Growth, Competitiveness, Employment' (1993) and the 1996 White Paper 'Teaching and Learning - towards a learning society'.

Alongside hard and soft Community law, the rulings of the European Court of Justice are another key factor influencing national policies. In the case of Germany, the ECJ has brought dynamic change to vocational education and training because of its functional link with the four basic principles ([10]) of EU law. That is, it has been extended to all fields of education, thereby obviously considerably expanding the EU's competence to act (Schröder 1991) ([11]).

In what follows I shall therefore focus on the effects of this second level of Community legislation, which is central to the establishment of vocational education and training policy, on the assumption that the significance of primary Community legislation ([12]) for vocational education and training policy is largely undisputed, given that general, vocational and higher education have been the subject of treaties since 1992 (for an expert discussion of the implications of Maastricht see Berggreen 1992, Feuchthofen; Brackmann 1992, Konow 1992, Jarass 1994, Bardong 1994). Reuter (1995, p. 213) sums up primary and secondary Community legislation and the rulings of the ECJ by saying that 'both the historical background to the Maastricht Treaty (and the role of the ECJ) and the EU documents of the 1990s on education policy...[argue] against the assumption of a clear restriction of the competence' of the EU institutions.

Instruments of the European policy area of 'vocational education and training'

Given the principle of subsidiarity, the potential for the EU institutions to steer policy in any specific field of European policy is largely indirect, via secondary Community legislation. I should like to mention three examples: first, EU initiatives on the formulation of an overall European plan for education and training; secondly, the roles of the Structural Fund and of education and action plans; and thirdly, the significance of Commission recommendations in stimulating innovative planning.

The European Area of Lifelong Learning as an EU policy area

The preamble to the 1997 Treaty of Amsterdam was deliberately broad, resolving among other things: 'to promote the development of the highest possible level of knowledge for their peoples through a wide access to education and through its continuous updating.' This stated goal, large-ly a response to youth unemployment in the EU, recognisably inspired by concepts of the OECD (recurrent education) and Unesco (lifelong learning), prepared programmatically through the Commission memorandum and its two white papers of 1993 and 1995, and given supporting publicity through the proclamation of 1996 as the 'Year of Lifelong Learning', refers to the notion of a 'knowledge-based society' in which initial and continuing vocational training are accorded considerable importance as factors in competition and the choice of location.

In the context of the discussion about the need for lifelong learning, there is one other serious issue relating to the development of the social structure in Europe, the importance of which can scarcely be exaggerated: demographic change. Over time, European societies reveal structural similarities not only in economic statistics but also in demographic data. For 50 years the birth rate has been declining sharply throughout Europe, which will have huge consequences in the medium term because the effect of an average rise in life expectancy will within the foreseeable future no longer be able to cushion the fall-ing birth rate: human resources will be in short supply in Europe because the average age will constantly rise. Germany is the Member State where this effect will be felt first. This means, however, that the available resources must be used to best advantage, i.e. more effectively, for which purpose educat-ion, vocational training and particularly lifelong learning are a suitable tool of political policy, and may indeed be the only way out of the demographic dilemma.

The model of the 'learning society' outlined by the Commission states that lifelong learning is interpreted 'ever more strongly as combining formal and informal learning' (Sauter; Grünewald 1999, p. 199), so that in other words the interval model of recurrent education is increasingly being replaced by in-

([10]) i.e. Articles 7, 48 and 52 of the EEC Treaty on equality of treatment, non-discrimination, freedom of movement and freedom of residence.

([11]) Up until the Maastricht Treaties, the competence of the ECJ in the matter of vocational education and training rested on Article 128 of the EEC Treaty; since then, these rulings on vocational education and training policy, the most important of which have required provision of access to places of training, for example (cf. the judgment in the Gravier case of 1985, for instance, on the issue of student fees, the judgement in the Lawrie-Brown case on teacher training, etc.) rest on the secure basis of the text of the Maastricht Treaty.

([12]) i.e. especially Articles 126 and 127 of the Maastricht Treaty, and Articles 149 and 150 of the Treaty of Amsterdam.

tegrated concepts, emphasising 'self-directed and self-organised learning' (see for example OECD 2000; Lipsmeier; Clement 1999; Sauter; Grünwald 1999, p. 199). This emphasis was also predicted in the Delphi survey in Germany (Bildungs-Delphi) as a specific trend in German education, and encouraged in Germany, for example, during the debate on 'skills development' (Bernien 1997, Münk 2002).

The growing European debate on the importance of lifelong learning driven by the institutions of the European Union since the 1990s is not taking place in a vacuum, however, but against the background of national education and vocational training policies and in the context of wide-ranging international discussion by such bodies as Unesco, the World Bank and the OECD.

The starting signal for the key education policy debate on lifelong learning was given at the Lisbon summit in spring 2000, where Member States declared education to be the 'main issue' so to speak, largely because of the widespread assumption of the positive economic effects of a proactive education and vocational training policy, with the result that the summit became known as the 'Employment Summit'. In its final communiqué, the Lisbon summit of heads of government set a new strategic goal of making the Union 'the most competitive and dynamic knowledge-based economy in the world capable of sustainable economic growth and with more and better jobs and greater social cohesion.' (European Council 23-24 March 2000, p. 2).

Specific goals were set for education, in close alliance with the goals of the Luxembourg Process: a substantial increase in per capita investment in human capital, halving of the number of 18 to 24-year-olds with no more than a lower secondary leaving qualification, development of schools and training centres into local 'multipurpose learning centres' open to all, establishment of a canon of basic skills, promotion of mobility and development of a European model curriculum vitae (European Council 23-24 March 2000, p. 9).

Alongside the goal of equality of opportunity, the emphasis was on the concept of employability and on giving higher priority to lifelong learning as a basic component of the European social model 'by exploiting the complementarity between lifelong learning and adaptability through flexible management of working time and job rotation' (European Council 23-24 March 2000, p. 8). The 2002 Barcelona summit built logically on the Lisbon Process (see Rosenau 2002, p. 153 ff. for a fuller chronology), which was recorded in the conclusions of the Ministers of Education of the European Union under the title 'a competitive economy based on knowledge/education'.

In terms of content, these conclusions gave focus to the key position statements of 2000 and 2001: the European Commission 'Memorandum on Lifelong Learning' of 30 October 2000, the 'Commission report on the concrete future objectives of education and training systems' of 31 January 2001, and the 'Commission Communication: Making a European area of lifelong learning a reality'. These built on the implications of the Lisbon summit and set out a detailed description of a networked, knowledge-based society based on lifelong learning and thereby guaranteeing economic development and social cohesion and welfare.

The six key programme messages of the Memorandum were the creation of new basic skills, higher investment in human resources, innovation in learning and teaching methods, greater attention to non-formal and informal learning, vocational counselling and guidance, and the goal of bringing learning physically closer to learners (European Commission, Memorandum 2000). In referring this programme back to Member States, the Commission stressed that lifelong learning and the circumstances of its social context (globalisation) posed a common challenge to all Member States that was structurally similar: 'While we must preserve the differences of structure and system which reflect the identities of the countries and regions of Europe, we must also recognise that our main objectives, and the results we all seek, are strikingly similar. We should build on these similarities to learn from each other, to share our successes and failures, and to use education together to advance European citizens and European society into the new millennium' (European Commission 2001, p. 15). Consequently, the 'open method of coordination' was introduced, for the purpose of 'spreading best practice' ('peer review') and 'achieving greater convergence towards the main EU goals' (European Council, Lisbon 23-24 March 2000, p. 11).

In essence, this open method of coordination (defining objectives and then checking how far those objectives have been achieved) means a new framework for cooperation between EU Member States on education policy (see Fabian 2002, p. 126 on this aspect), aiming at a approximation of national policies, competing to create the most successful education and employment policies.

It is particularly remarkable that the open method of coordination rests on a decision by the Ministers of Education of the Member States. At least from the German perspective, the old, more or less traditional objection by Member States that the Commission was pursuing an inappropriate and unlawful policy of intervening in education no longer holds because the representatives of the Member States had a share in framing the decision, and were jointly responsible for taking it. Henceforward, this criticism would appear to have shifted to a level low-er in the German federal system and to be forcefully expressed by the Ministers of Education in the Bundesrat, which believes that it sees in the new open method of coordination 'the danger that it could open the way to coordination of education policy by the Community'. (773rd Session of the Bundesrat, stenographer's report, quoted by Rosenau 2002, p. 156 ff.)

e-Learning and mobile learning as tools of lifelong learning

The prospect of an educational biography marked by continuing lifelong learning has acquired a new dimension through new multimedia-based IT technologies. 'Learning that is supported by...ICT...is therefore not limited to "digital literacy" (...) but may encompass multiple formats and hybrid methodologies, in particular, the use of software, Internet, CD-ROM, online learning and any other electronic or interactive media' (Cedefop 2002, p. 5-6).

The advantages of e-learning and the direct connection with the core issue of lifelong learning are self-evident (decentralised, individualised learning that is not time-bound and can be used flexibly, greater equality of opportunity provided that broad access to the technology is guaranteed: see, for example, Esser; Twardy; Wilbers 2001). e-Learning is also, so to speak, a genuinely European form of teaching and learning because it transcends the borders of national vocational education and training systems by its very essence and by virtue of its structure and can therefore be used without restriction throughout Europe for teaching and learning - if we may forget the problem of language for the moment.

The Commission's 'e-learning initiative' is a logical response to this development and regards e-learning, and lately also 'mobile learning', as an opportunity to 'modernise the economy', offering 'all citizens, especially young people, the knowledge and support...to succeed in the knowledge-based society' (after Prodi, EU News 6/2003). A Europe-wide Cedefop 'survey into the use of e-learning in training and professional development in the European Union' (Cedefop 2002, p. 4) suggests that e-learning has 'a key role in the pursuit of the EU's policy objective...of making the EU the most competitive and dynamic knowledge-driven economy in the world.'

The Commission's e-learning initiative therefore also sets out to improve the quality of learning - even though a Cedefop study recently found that over 50% of EU citizens, and as many as 64% in Greece, were not familiar with 'ICT skills' (Cedefop 2003, p. 8-11). The large number of projects launched by the Commission in the context of the e-learning initiative (under Comenius, EQUAL, Leonardo, IST and elsewhere) is in itself evidence of the targeted awareness of the problem in education, and particularly in labour market-oriented vocational training policy, but also demonstrates that considerable shortcomings have yet to be overcome in this field. These are less of a technological problem than a problem of teaching methods and, in the broadest sense, an educational challenge, and also call for quite new teaching and learning arrangements such as new organisational and institutional structures.

The EU policy area of promotional programmes

The ESF and education programmes

The restructuring of the structural funds for the years 2000 to 2006 makes no fundamental change to the previous key task of structural

support in order to strengthen economic and social cohesion through measures to promote employment in structurally weak regions. There is therefore an obvious similarity with the employment policy objectives of the European Union Treaty (Article 150), and support for the European employment strategy and employment guidelines is implicitly contained in the new arrangements. Links between the ESF and the employment promotion activities of the EU may well grow further in future since greater complementarity between structural funds and action programmes is aimed at, and some of the resources may also be used to expand vocational education and training measures (bmb+f 2000, p. 205 ff.).

The action and education programmes launched by the EU since 1985 have had an even greater influence than the ESF. Under Articles 126 and 127, the Commission adopted 'Guidelines for Community action in education and training' in May 1993 as a key element of secondary (soft) Community legislation. In these it announced that it would 'act to complement the measures of Member States and create a common framework in order to coordinate Community and national efforts and to restructure the education programmes (Socrates and Leonardo)' (Reuter 1995, p. 212). Together with the 1993 White Paper 'Growth, Competitiveness, Employment', these set out the cornerstones of a thoroughgoing modernisation of European vocational education and training, both accentuating the labour market and competitive function of vocational education and training, and arguing for promotion of the 'European dimension in education', a rise in the quality of training and greater innovation in education as a whole (European Commission, White Paper 1994, p. 144 et seq.), under the banner of coherence between education, training and culture in Europe.

These funding programmes operate in many different ways, which cannot be quantified exactly: within countries they may be used to legitimise national support for education; they create dependencies and blur boundaries of responsibility (see, for example, Sieveking 1990); they provide a structure for international cooperation from a European policy perspective, and not only serve as an instrument of comparative benchmarking between competing vocational education and training systems, but also mean that the European dimension must be taken into account if sponsorship is to be retained. The extraordinary importance of these EU initiatives under soft Community law is demonstrated by the rise in participation and in interest among Member States, especially since the launch of Leonardo: it would be difficult to exaggerate the value added to vocational education and training by this at least potential 'Europeanisation' of national vocational education and training policy since these programme activities frequently stimulate debates about reform in individual states.

The EU policy area of Commission planning recommendations

Planning recommendations made under secondary Community legislation are by their nature diffuse and devoid of legal force. It is therefore not surprising that the Commission has not so far put forward a coherent plan for either initial or continuing vocational education and training, but has merely launched a assorted collection of individual suggestions and measures. This suits the subsidiary, complementary role accord-ed to the Commission under the EU Treaty. In the past, a series of these suggestions has proved fruitful and politically unproblematic. The numerous national projects initiated or taken advantage of by a whole series of Member States under the Leonardo da Vinci programme should be mentioned particularly in this context, alongside the Council Recommendation of 30 June 1993 on access to continuing vocational training, which has been associated with a large number of individual concrete proposals ([13]), and the efforts of the EU to enhance the quality of vocational education and training.

The main focus has nonetheless been on recent attempts to achieve the goal of transparency of vocational education and training systems, and of accreditation and evaluation. Bjørnåvold (1998, p. 44) comes to the critical conclusion, however, that 'much information and experience comes from the bottom up...but that the inherent potential of the many initiatives is not fully exploited.' It can be assumed, Bjørnåvold (1998, p. 44) continues, 'that the exchange of information' will as a whole remain 'too modest, the interpretation inadequate and the mechanisms to promote exchange and interpre-

([13]) e.g. the measures to improve planning of in-company continuing training, help for SMEs, provision for groups facing difficulties in the labour market, development of teach-ing and learning methods, etc.

tation of information insufficiently developed' until measures achieve some degree of control and permanence.

It can be observed overall in respect of efforts at greater transparency in European vocational education and training systems that there has been recognisable progress in methodology (ESAS - 'European Skills Accreditation System') and in content, following a lengthy process of recognition, alignment - which generally failed - and more recent schemes of individual portfolios and skills passports (see Bjørnåvold 1998, p. 24 for an overview of portfolios).

One secret of the success of these recent schemes for accreditation and validation of formal and informal skills certainly lies in their consistently decentralised organisation and above all in the fact that this type of validation does comparatively little to threaten the sovereignty and competence of Member States in educational planning, even though there is much talk of the suspicion that harmonisation is aimed at convergence of European systems (e.g. Bjørnåvold 1998, p. 32), which has given rise to reservations in Germany, for example.

Although these and other innovative planning recommendations are not legally binding in formal terms, some particular suggestions for innovation have in the past become the focus for conflicts of interest between the EU institutions and the Member States of the European Union. These conflicts of interest demonstrate the critical potential of EU intervention in planning in the policy area of 'vocational education and training' which, at least in the 1990s, regularly provided the nucleus for national resistance.

The conflict of interests between European integration and national sovereignty

Until the 1980s it was accepted that the conflict of interests between European planning recommendations and national intentions was less severe in the states on the edges of Europe with a shorter history of vocational training systems than in the core states of Europe: the former were looking forward to 'development assistance', although this cannot be reduced merely to economic support, while the latter were more concerned with maintaining the institutional structures of their vocational education and training systems.

There have been many such conflicts, and national interpretations prove decidedly selective: Germany, for example, welcomes the Commission recommendations to expand apprenticeship, but is a fierce opponent of the Commission proposal for a European system of accreditation, particularly of individual skills that are not formalised and certified but are acquired through the process of learning while working: this notion is in line with the nature of the British system, for example, but runs counter to the strictly formalised, certified system of German initial vocational training.

The same applies to the controversies over the five-stage scheme introduced by the Commission, and to what might be termed the conflict of paradigmatic objectives over the Commission proposal for modularisation of initial vocational training, which is based on the British system that has now been in place for decades (Münk 1997, p. 100 ff.).

The German reaction to modularisation demonstrates two things. Firstly, it shows that that the Commission's aim of making structures of initial and continuing vocational training more flexible is only realistically likely to succeed if it does not fundamentally threaten the structure of establish-ed systems; secondly, the German Federal Government's retreat from its initial stance of complete rejection reveals that the Commission's role as innovator, catalyst and driving force for dynamic integration is largely being fulfilled. In respect of Germany, Hanf even observes a 'long-term impact of the Europeanisation of the notion of occupations...merging the concept of occupation with modularity' (Hanf, 1998, p. 157).

In view of the fundamental conflict of aims between integration and national sovereignty, the example of the debate over modularisation also shows that it is not appropriate, and is indeed impossible, to impose a so-called pan-European vocational education and training system: the implicit message is to observe the motto 'unity in diversity'. On closer examination, this is also supported by the theoretical findings presented at the beginning.

([13]) e.g. the measures to improve planning of in-company continuing training, help for SMEs, provision for groups facing difficulties in the labour market, development of teaching and learning methods, etc.

Unity in diversity - A reconsideration of the theoretical findings

The opening remarks on global and/or European trends of convergence of social structures should be relativised as follows. Neither the perspective of modernisation nor that of social structure theory excludes variations. In fact they both systematically allow for these through differences in timing or path of development, and widely differ-ing findings of social structure analysis in respect of the structural development of vocational education and training systems. The core finding is in fact that the structure of education and training systems is 'not a matter of chance but the result of specific cultural value orientations and social and economic circumstances' and that 'vocational training in particular [reflects] national dividing lines' (Müller; Steinmann; Schneider 1997, p. 185).

The overall purpose of the historical comparative study by Greinert (1999) cited at the beginning was not in fact to demonstrate convergence throughout Europe but the opposite: to give details of the historically and socially conditioned and therefore irreversible differences that have grown up between European nation states in their vocational education and training systems.

Comparative results of social science research also confirm the European belief in 'unity in diversity': Heidenreich, for example, asserts that what matters is 'to take account of the context of vocational training and education, with its interdependencies and strategic links with the cultural system' (Heidenreich 1991, p. 53). Some representatives of German research into vocational and commercial education (Georg 1997 and Deissinger 1999) have in recent years contributed to the debate about vocational training by reviving the 1970s 'theory of social effects' of Maurice, Sellier and Silvestre (1982), with the aid of which the underlying causes of social developments and the structural influences of national traditions and cultural practices can be identified. Lutz (1991), in particular, proves by comparing France and Germany that despite having comparable technology and economies, national peculiarities and differences can be observed in the organisation of industry and labour. Lutz and Veltz (1989, p. 218) see the specific way in which 'vocational skills are taught' in countries as being a 'key causal and explanatory factor'.

The thesis of convergence, which is so plausible in theory, would appear from the detailed social structure of vocational education and training systems to be based on a consensus that might be called 'similar in intention, dissimilar in form' rather than some vast macro-structural millenarian vision.

The 'Unitas Multiplex' strategy of adaptation rather than adoption

Lastly, it cannot clearly be identified whether changing conceptual trends in vocational education and training systems have direct European causes or are the result of pressures to adapt, however expressed, which are somewhat intangible: the process of political integration, primary and secondary Community legislation, the trend towards globalisation with its pressures of competitiveness and rationalisation, and the development of new technologies and modern ways of organising work, all create immense pressures, largely independently of the process of European integration. Furthermore, not only are these technological and economic pressures, which are typical of industrialised societies, transnational, but the social and economic functions of vocational education and training themselves also reveal a great degree of similarity in modern industrialised and knowledge-based societies. This structural similarity is found not just in the challenges but also in the problems to be overcome throughout Europe - by way of example I would once more mention the traditional European problem of youth unemployment.

However, it can be stated at least in respect of Germany that opinions have recently been expressed by the Federal Government, in the 'Vocational Training Reform Project', for example (Deutscher Bundestag 1997) ([14]), and even in trade union position papers (Hans-Böckler-Stiftung 1998) ([15]), which cling to the basic principles of the dual system and hence to the concept of occupations, and reject modularisation after the British model. However, these reform statements also clearly demonstrate a readiness for fundamental change and have a certain European flavour.

([14]) This reads (Deutscher Bundestag 1997, p. 3 f.): 'The Federal Government holds to the concept of occupations as the basis for the content and structure of recognised training occupations. High priority is given to occupational status in Germany, extending beyond the world of work as a marker of social identity. Occupations defined nationally as a framework for structuring the content of vocational train-ing provide transparency in the labour market and ensure occupational flexibility and mobility. Training in occupations offers specialist preparation for a wide range of chang-ing applications in many different fields of activity. It therefore promotes personal skills, thinking and action which extend beyond the confines of narrow fields of employment. This cannot be provided by the step-by-step addition of modules offering preparation for specific jobs. Occupational training as preparation for initial entry to the world of work and as the basis for lifelong learning, on the other hand, is the more modern concept, offering greater security for the future.'

([15]) This committee of experts takes the European term 'lifelong learning' literally and proposes replacing an 'institutionally oriented by a process-oriented conception of continuing education' (Hans-Böckler-Stiftung 1998, p. 42) in the sense of the restructuring of people's lives and their educational and working careers and family activities. The process-orient-ed conception is framed so broadly that the authors believe that modularisation can be reconciled 'in principle with the concept of occupations', albeit it in a specific form, not just in continuing education and training but explicitly also in initial training (by shortening basic training and bringing forward training periods) (Hans-Böckler-Stiftung 1998, p. 16).

The development of the debate on education and training policy, and of the theoretical discourse in the 1990s, also signals that highly controversial concepts such as modularisation and accreditation are nonetheless being given serious consideration. In Germany this is partly because such a perspective is required for the very contemplation of reform, without the need immediately to question the system - this applies particularly to the history of the German reaction to modularisation. Europeanisation of the structure of vocational education and training is therefore not only conceivable in theory but also empirically discernible, at least in outline.

In conclusion, it is therefore impossible to say with the desired certainty whether vocational education and training is being Europeanised. According to the current state of research, it is clear that there is no question of there being a real European vocational education and training system. However, it appears equally clear that it is no longer feasible, for example, to consider the development of the German system of initial and continuing vocational training in its own terms and within its own framework. As Hanf (1998, p. 148) states, European vocational training policy has for at least a decade been developing increasingly into 'the systemic environment'. The impact of the process of mutual dialogue, which takes place as it were under the umbrella of European policy guidelines and objectives, is obviously a kind of osmosis, leading to a gradual spread of a wide variety of elements and approaches with a European dimension ([16]).

This process of dialogue is adaptive in nature and therefore scarcely threatens the conceptual heart of the vocational education and training systems in Europe, which are historically and socially unique. But it is also very clear that to ignore this process of integration would genuinely endanger the structural survival of these very systems.

The leitmotiv of 'unity in diversity' and Edgar Morin's vision of a 'Unitas Multiplex', drawn from cultural sociology, are therefore more than a compromise formula. Even in the context of scientific analysis, the concept of 'Unitas Multiplex' has a very specific meaning, which concerns the economic and legal essence of the process of European integration: Europeanisation of vocational education and training is, if only because of differing social and historical paths of development and on grounds of national sovereignty, not a synonym for the standardisation of vocational education and training. But it does, as is stated in the 2000 Vocational Training Report, make a challenging demand for fruitful 'competition between education systems' and for 'individual education and training systems to look at their own strengths and weakness, to try new ways and to create and build on a shared set of European training principles and criteria' (bmb+f 2000, p. 201 ff.).

([16]) The effects of this process can definitely be explained in terms of modernisation theory, as argued at the outset, and can therefore be compared with the creeping socio-economic effects of globalisation.

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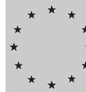

Measurement of training activities

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Inadequate methods for measuring training activities are a basic problem in explaining variations in training activities and organisational or personal success in interaction with training etc., as well as for statistical comparisons among countries, industries, professions or demographic groups. The manifold methods used primarily are only adequate for application in the privileged segment of governmental organisations and other big organisations such as enterprises with a highly developed training culture. In contrast - using a rough distinction - for unprivileged population and organisation segments the methods are less suitable. This study presents a possibility for bridging this gap with a new ratio called TrainingActivityDegree (TAD). The first-time empirical TAD data reported here demonstrate practical applications of the ratio in statistics and in context with statistical methods.

Introduction

Vocational training activities are primary measures for improving organisational and individual competitiveness and success. Numerous authors have emphasised the need for further training to adapt swiftly and improve the qualification of entrepreneurs and employees. This, in turn, delivers the ability to cope with dynamic economic and technological changes, innovations, and sociostructural developments in the labour market, improving international competitiveness through higher quality and cost-effectiveness (e.g. Bates, 2001; Cedefop, 1998a; Conlin and Baum, 1994; Cooper et al., 1997; Fayos-Sola and Jafari, 1997; Freyer, 1988; Hinterhuber, 1997; Hjalager, 1994; Icking, 2000; Langer, 1989; Langer, 2003a; Moutinho, 2000; OECD, 1996; Rosow and Zager, 1988; Smeral, 1994; WTO, 1994). Huge investment in training activities (Lakewood Research, 1998∞ indicates a need for qualified research, planning, and controlling techniques.

In view of the generally acknowledged importance of training, universally applicable methods for measuring training activities should be available. Such a method was required for an empirical study of the accommodation trade, for which 'tourism industry' is often used synonymously (Freyer, 1988; Kaspar, 1991; Leiper, 1999), of Central European Alpine regions in Austria and Bavaria (Germany). However, an examination of statistics and a survey of publications on the measurement of training activities yielded few usable results, as shown below. As a result, an adequate method of measuring training activities had to be developed according to specific criteria. For this purpose, the 'TrainingActivityDegree' ratio (TAD) was developed.

The new method had to go beyond the reporting of simple statistical values. It needed the potential to show the individual's readiness and willingness to participate in training, thereby providing an indicator that could also be used in theoretical models to explain variations in training activity, and, further, to explain the effect of training on the success of individuals or enterprises. To ensure such statistical and theoretical applicability, a fundamental decision was made to focus on non-monetary values rather than the standard monetary values commonly used in economic models. The use of monetary values is problematic because they fail to take into consideration expenditure aspects (and income aspects, too, if low income hinders training participation) which have an impact on the degree to which participation in training activities can be measured. For example, the same training measure could be available at three different prices: standard market price, reduced price and cost-free, depending on the subsidies available. Moreover, the same training measure could have different prices even if subsidies do not exist. As a result, even simple statistical values provide a distorted picture. In contrast, time investment, although not perfect, can be a decisive indicator of the individual's readiness to participate in training. It seems particularly appropriate in an age where many perceive they have little time, giving rise to opportunity costs.

An additional issue in measuring training activity is the applicability of a method in all branches and sectors of the economy, worldwide. Using the example of the current study, Central European tourism fundamentally differs from other industries, being dominated by medium and large-scale organisations which generally feature well-organised human resource management and training structures, e.g. the public sector or the finance sector. In contrast, the tourism industry is dominated by small-scale enterprises or small businesses (Langer, 1988b), officially defined by the European Commission as enterprises with 1 to 50 employees, though most, in practice, have 10 or fewer. The executives or management of such enterprises are characterised by a lack of special knowledge of human resource management and a lack of time for management duties because they are concerned with a wide variety of tasks (Feleppa, 1998; Kailer and Scheff, 1998). The appreciation of the need for human resources development is diminished by the fact that

owners or managers often lack a clear concept of the relationship between training and performance (Boer et al., 1997).

Furthermore, the example of small tourism businesses shows specific features which influence training measures and, consequently, the compilation of reliable training activity data. First, seasonal fluctuations require many employees in the tourism industry to change their place of employment twice per year. As a result, employers view training investments as uneconomical and avoid them (Becker, 1964). Because employees often finance training activities themselves, and, in many cases, pursue training activities during periods of (seasonal) unemployment, employers are not involved in, and, therefore, normally only partially informed of, employees' training activities. Second, the sector is mostly composed of employees qualified at low and medium level and a high rate of women (about 60%) and of young people with a short-term employment or trade perspective (Langer, 1984; Langer, 1988a), who often do not aspire to getting ahead and generally do not keep a record of training measures. The third factor is related to the entrepreneurs themselves. Often their education level is also moderate, their attitude towards training is one of distance, and they usually do not keep a record of their training because they are not active in the job market. Fourth, these structural factors are exacerbated by the absence of a general system for reporting education, training, and development. Finally, the training market is dominated by a broad range of suppliers who provide services to individuals and do not have an overview of the total activity of a single person.

In light of these factors, it is not surprising that there is an absence of useful and reliable training activity data. To exacerbate further the problem of gathering information, there is an extreme variation in the duration of training measures in the tourism business. Employees and employers in this sector mainly participate in relatively short-term training activities in the order of a few hours, one day, several days, a week, or - in a few cases such as language courses - several months and longer (Langer, 2000-01; Langer, 2000-02).

These industry characteristics, together with the involvement of groups, employees and employers in empirical research, cause decisive problems regarding the measurement of training activities. It is not possible to opt for an organisation-specific and low-cost method of measurement, examples of which have been described by Bates (2001) and Weber (1985), among others. This challenging situation resulted in an effort to develop a method for worst-case situations that also would be applicable in as many situations as possible.

Review of literature

The review of literature covered a diversified, broad-spectrum survey of publications in the field. It is presented very briefly and selectively here (for more detail see Langer, 2000-01). First, it covers the general topic of education, further vocational training and human resources in search of a universally applicable solution for the measurement of training activities. A second objective is to identify the problems and implications of new solutions by discussing the current situation.

Demanded features of measuring methods regarding training activity

Methods of measurement are analysed according to their ability to meet two demands. The first is sufficient usability for a valid and reliable assessment and effective presentation of training activities. In addition, the use in explanatory micro- and macro-economic models of society is a major requirement for:

(a) analysis of training activity variation among individuals (employed, unemployed) and their success as labour market participants;

(b) the success of firms (with a focus on micro-enterprises) as influenced by training activities.

In such analysis, it seems appropriate to assume that the benefit of training activities can be measured on a yearly basis. However, it may be that, in the early months (even the first year) success generally, and strategically, is low. This means that for analysis of training success at the micro-level of the individual or organisation, activities must be assessed over longer periods, e.g. three years or more.

The second demand is the usability of a method for all training segments (individuals, organisations) including the segment that has a systematic and highly developed training culture. This group can generally be described as comprising governmental organisations, the finance sector, some of the manufacturing sector plus larger enterprises or small and medium sized ones in specialist sectors. These have a training culture that allows simple methods for measuring training activities, i.e. assessing activities over short periods, such as four weeks, or longer times, such as a year. However, the selected measuring method must also work satisfyingly in industries with fragmented and sometimes chaotic training cultures, often characterised by unsystematic training activities, low training activity rates and long breaks between training activity. It must also deal with small enterprises (often in the service sector), low wage industries, and specific demographic segments such as women fitting their careers around children or people in sectors with low qualification requirements.

Measuring methods used in various contributions

Contributions in the last seven years to studies of human resources management, education and further training in tourism, and in general in English and German speaking areas rarely focus on measuring training activities (e.g. book-length publications of Bardeleben et al., 1996; Cedefop, 1998a and 1998b; Gee and Fayos-Sola, 1997; Go et al., 1996; Mullins, 1995; OECD, 1996; e.g. articles and conference reports of Airey and Johnson, 1999; Ashley et al., 1995; Barrett et al., 1995; Barrows et al., 1995; Dionne, 1996; Fayos-Sola and Jafari, 1997; Guerrier and Deery, 1998; Leiper, 1999; Okeiyi et al., 1994; Richards, 1998). Articles and conferences deal mainly with higher education, management development, or human resource development as a managerial technique of medium and large-scale organisations, while education, training, and development of employees and self-employed individuals without much formal education (mainly employed at small enterprises) are largely ignored.

Subject matter more closely related to measuring training activities can be found in, for example, Harrison (1996), with a comparison of training at large businesses based on their financial human capital investment. Unesco (1997) employs a 'gross enrolment ratio' for the comparison of gender disparities in school participation, without addressing the topic of further training. Publications by Cedefop (1998a and 1998b) on vocational education and training (VET) deal with a variety of aspects relevant to the quantification of training activities, including a distinction between formal education and non-formal learning, as well as further statistical documentation of educational activities. The OECD publication about "Lifelong learning for all" (1996) includes documentation of educational activities, including time series of the number of courses offer-ed and the percentage of further training activities by age groups.

Cooper et al. (1996) describe individual instruments that are especially important for the improved reporting of educational and training activities:

(a) the accreditation for prior experiential learning (APL), which records past educational activity (Bjornavold, 2001: 110 et seq.) and is part of the national vocational qualifications (NVQs) in the UK;

(b) credit accumulation transfer schemes (CATS), which are closely associated with making educational systems more modular, flexible, and individualised;

(c) the CEUs (continuing education units) of IACET (International Association for Continuing Education and Training), which can be regarded as credits in the area of further training, where the activities are calculated in hours (IACET, 2003).

Such well-documented educational and skill development activities make it possible to determine a fairly reliable individual Training ActivityDegree. In order to measure further training activity at industry level through such systems of documentation, however, the concepts must be expanded to include employees in lower and mid-level positions and the executive staff of micro-businesses. The record of achievements in the UK is a good example of such a concept.

In the future, bridges could be built between systems that record training activities for the purposes of certifying personal qualifications on the one hand, and, on the other hand, the quantitative measurement of training ac-

tivities developed in this study for statistical and scientific purposes. Furthermore, attention should be paid to the TEDQUAL system as a method enabling 'a form of voluntary standardisation for dealing with quality issues in tourism education and training' (Cooper et al., 1997). A conversion of this proposal into a standardisation of the quality of educational provisions could lay a foundation that would render the inclusion of qualitative factors, together with a quantitative documentation of training activities, considerably easier in the context of an expanded TAD.

It is to be emphasised that non-monetary training activity indices play an important role in theoretical explanatory models of education and training. They are used as dependent variables in explanatory models of the behavioural sciences and of human resource management theory, or in empirical ad hoc models (e.g. Bardeleben et al., 1996; Bates, 2001; von Rosenstiel, 1984; Weber, 1985) as well as in economic models (e.g. Becker, 1993; Mincer, 1974) as supplementary values for missing monetary input values (investment in human capital). Based on equilibrium theory, economic models postulate that educational activities influence the dependent variable 'salary'. Building on this foundation, the works of Becker (1964) and Mincer (1974) led to an explanatory model in which the homogeneity assumption of the equilibrium theory concerning the factor 'work' was omitted and non-monetary benefit and cost categories were considered.

In contrast, social science models (e.g. Bates, 2001; von Rosenstiel, 1984; Weber, 1985) use specific training activity indices as dependent variables. One of the described outcome measures of Bates (2001), the 'subjective measure of training', reports training days within one year, self-reported by training participants. In this case the index should be identical with the TAD (see TAD description and specifications below). The problem is that a one-year period often is too short to attain valid results because the impact of those employees in the explanatory model who have attended longer courses in each of three previous years and did not (or were not allowed to) participate in training courses during the observation period is ignored. If Bates' subjective measure were extended to a longer observation period, it would come close to the features of the TAD. Bates uses the term 'objective measure', defined as organisation-sponsored training events (not day units), whereas the outcome measure by 'event' only should be employed if the events have a very similar duration (e.g. 3 weeks each). Furthermore, the 'objective' character is a problem if the organisation is not aware of training measures outside of the workplace.

Measuring methods used for official training statistics

Insufficiencies must also be emphasised concerning the official training statistics of the European Commission, especially with regard to micro-enterprises with fewer than 10 persons (European Communities, 2002). Methods and definitions are described in reports on continuing vocational training surveys (CVTS) conducted in 1994 (regarding 1993, CVTS1) and 2000/2001 (regarding 1999, CVTS2) and in reports on the labour force surveys (LFS). Both have incomplete and not continuously clear descriptions of the characteristics of censuses of training activity data (European Commission, 1997; Nestler and Kailis, 2002; European Communities, 2003; Statistik Austria, 2003) summarised below.

Compared to the definition below, which restricts training to formal training activities, the Eurostat term training includes a heterogeneous mix of formal and informal development activities (European Commission, 1997: p. 85 and 102; European Communities, 2003: p. 51 and 90). It is not clearly identifiable whether training is defined in the same way in CVTS and LFS; in fact, there seem to be notable differences. This may cause basic problems regarding the valid measure-ment of formal training itself and for valid comparisons of training activity data within the Commission's statistics.

CVTS considers only training activities which are financed by enterprises for their employees, so use of the term vocational training (Nestler and Kailis, 2002) or in German ***Berufsbildung*** (European Commission, 1997) seems questionable and misleads. In 2003 there was a change in German publications (European Commission, 2002; Statistik Austria, 2003) with the term ***betriebliche Weiterbildung*** being used to greater descriptive effect; this could roughly be translated as company-internal training or even as on-the-job training. The term vocational can be translated as ***beruflich*** in German and

would be interpreted as an umbrella term, including company-internal training as one of various types. Of major importance are activities organised by individuals (financed by themselves or by other institutions) these are not covered by the CVTS concept. In contrast, LFS includes both types of continuing vocational training and, in this respect, delivers more information.

CVTS considers a short period of one year and LFS considers the very short reference period of training activities in the last four weeks only.

CVTS counts the number of training hours as a part of paid working hours used for one or more training activities during the one-year period. The data are provided by the employers. In contrast LFS analyses the statements of individuals between 15 and 64 about themselves. LFS considers only one activity, the longest course in terms of hours, even if two or more have taken place. The focus is the 'usual number of hours', for one activity in a typical week of this activity. Time spent on homework is excluded, even though this may be a most effective way of learning.

CVTS only covers enterprises, mainly those employing 10 persons and more, including working proprietors (Statistik Austria, 2003). Furthermore, the report ***Key Data on Vocational Training in the European Union*** (European Commission, 1997) on CVTS results also contains LFS results relating to self-employed individuals (businesses with-out employees) covering the age group from 30 to 59. It must be noted that the LFS (European Communities, 2003: p. 51) potentially gives a more complete picture of training activities in the European Union, because all labour market segments are included. In addition, all training activities are seemingly included, whether relevant or not to the respondent's current or future job, according to ISCED (International Standard Classification of Education - Unesco 1997).

CVTS counts the individual duration of training activities measured in working hours (not in training hours). The data are presented as various ratios (European Commission, 1997; Nestler and Kailis, 2002) as well as average data on training hours of individuals (Statistik Austria, 2003). Hours of vocational training self-financed and independently organis-ed by employees are not considered in CVTS data. In contrast, LFS (European Communities, 2003) includes all types of training hours, though only over the preceding four weeks and only for one activity.

In summary, different definitions of training, distinct time peculiarities (deficits), reduced inclusion of training activities and segment-based selection of individuals, which occur in varying combinations, together add up to an insufficient calculation of training activities. There is the impression that the European Commission evolves its activities based on a concept of training culture which is typical for the European Commission itself, the public service sector in general, lobby organisations or large enterprises in the finance or manufacturing sector with well-organised departments and systematic personnel development and training activities. There seems little appreciation of the less privileged sectors - organisations and employees such as micro-enterprises, the self-employed, the unemployed and women who temporarily stay out of labour market (e.g. to care for children) - that are often financially exhausted, badly organised, discriminated against and exposed to distorted competition. These are frequently self-fund-ing and train in their leisure time. Although the majority of European enterprises (Schmiemann, 2002) and citizens belong to these categories, privileged thinking and its permutation inter alia when implementing surveys, seemingly dominates. Even though exercises such as the LFS surveys consider each labour market segment and each training activity, the surveys are hampered by the various weaknesses described, are presented in a hesitant manner and accessibility is unsatisfactory. The problem is the lack of a general method of assessing training activities adapted to the training culture of the unprivileged majority. Of course, such a universal method should be fully applicable for the privileged segment too and so allow valid comparisons of training behaviour for all segments of individuals and of organisations.

Definitions and measurement procedures of the OECD, which are described in detail in a manual (OECD, 1997), deliver a further definition of training which obviously differs considerable from those of the European Commission. One variation is that, in a survey of education and training the OECD recorded '... up to three training courses taken during the previous twelve months' (O`Connell, 1999).

The Australian Bureau of Statistics (ABS) has a highly developed terminology and measurement procedure (ABS, 2003). However, there are limitations in terms of current aims. The compilation covers a maximum of four activities (instead of including each), the period of one year is very short in respect of the fragmented training cultures of various segments (sectors, small enterprises, women, etc.) and there strike some questionable delimitations of the term 'learning' in relation to formal, non-formal and incidental learning. Additionally, the term training remains unclear. It obviously is a combination of formal and non-formal training if the definition is used for comparison (see below). This mix may be of distorting influence if searching for a valid picture of (formal) training activities only.

The official statistics in Germany (bmb+f, 1998; Kuwan et al., 1996; Pannenberg, 1995) and in Austria (OSTAT, 1992; Zeidler, 1990) are especially relevant because the current research was conducted in these countries. These statistics, like the procedures discussed before, show specific handicaps of measuring training activities (Langer, 2000-2001) which are discussed in the summary below. It must be emphasised, that a reporting purely of events (participation) without recording time units such as hours or days is insufficient.

A comparison of these training measurement procedures from national or supranational organisations, which are of major relevance to current objectives, first shows differences in definitions and procedures and, second, shows that they do not fulfil specified requirements:

a) definitions of training, as delivered by the five organisations, are questionable to varying degrees as well differing from each other, so that international comparisons are invalid. Additionally, intranational comparisons between industries or employment segments may be affect-ed, caused by variations in training as a result of different learning cultures.

b) the procedures are not sufficient for comparisons and for academic research because:

❑ they take a one-sided view, focused on well-organised training (the privileged sector). For the (very significant) remainder, the picture of training participation may be biased by very limited recording of activities (four weeks, one year) which is a particular problem in industries and population segments with infrequent training participation. In addition, the limited reference period does not take into account that training effects may be long lasting.

❑ the picture of training participation can be biased in two ways by limited recording of activities: a) it may cover only one activity, or a maximum of three or four activities in the reference period; b) it may only cover training activities during work time (as in the CVTS). However, the total activity is relevant if effects are considered.

❑ selective recording, e.g. only the employed, only enterprises with 10 and more employed persons.

Specific problems of such national and supranational training data must also be point-ed out. The availability of data in general, and of micro-data in particular, may be limited by data protection concerns. If train-ing data are available, then deficits regard-ing the usability in academic research normally exist because of the need for specific research questions which cannot be considered in general statistical surveys.

Finally it must be emphasised, that correlation of organisational and personal variables is normally not possible with the data from the organisations discussed above, which is partly of relevance to the current research project. An exception are the CVTS data, though the spectrum of queries is limited to the subject of training itself and does not include general organisational data. So, this objective only can be reached by gathering data in organisations concerning the organisation itself (e.g. success data, training culture, positioning) as well as individual data for executives and employees.

Review of the situation

Huge investment and numerous activities relating to education, training, and human resources document the importance of these subjects. This underlines the importance of the development of meaningful

statistics and streamlined research, an important objective itself and also a necessity in decision-making on investment in human capital by policy-makers, public organisations and private enterprises.

However, it is apparent that understanding of the measurement of training activities in many respects is insufficient. The significance of official statistics is affected, e.g. the examples of the European Union, Australia, Austria and Germany show different configurations, making inter-country comparisons difficult. The methods employed do not characterise all industries and training segments adequately and the methods are so problematic that the validity of measurement is questionable. In addition, research mainly focuses on isolated training situations in organisations which allow the application of specific output measures in combination with low-cost survey methods. The value of such organisation-specific findings lags behind the options, particularly as the possibility to attain universal findings by qualified methods in some cases nearly is achieved.

The present literature review points to the existence of a current lack of knowledge. An absence of a commonly accepted method is evident even in countries with intensive efforts in this field. Since no existing method seemed appropriate to achieving the desired research objectives, a new method had to be developed. However, public statistical data would not allow testing of the hypothesis because major variables which influence the extent of training activities or success are not covered.

Development of a new method for measuring training activities

Based on a distinction of the terms training, education, and personal development (or learning) the term TrainingActivityDegree (TAD) is introduced, further specified by terms for education and development activity ratios, followed by technical details about its measurement, its representation, a suggestion for categorisation and main applications of the new ratio.

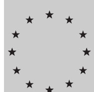
Definition and delimitation of the term training

The terms education, training, or development (in relation to learning) are sometimes used interchangeably, sometimes with different meanings, e.g. education or training each being used to include the others (e.g. Cedefop, 1998a; Go et al., 1996; Torkildsen, 1992). Currently, development, or personal development, is used as an umbrella term which can stand for all development processes from the start of life (even before birth). It can be subdivided into formal development, at school or in organised train-ing courses, and informal development, such as everyday learning, or informal learning, for which the literature sometimes uses 'non-formal' development (Cedefop, 1998a and 1998b, Vol. II; Bjornavold, 2001). The current research related to vocational training of adults demands distinction between different development activities: education, training and informal further development. An alternative term for development is learning, as used by the Australian Bureau of Statistics (ASB, 2003), which is very similar and accents the characteristic of conscious activity.

This delimitation of the term training and of training activities from other development activities is necessary because it decisively influences the value of the TrainingActivityDegree ratio. In addition to the delimitation of the term training, the mode of calculation, the observation period of training activities, and the selection of activities (e.g. training regarding specific contexts such as profession, organisation, industry) are important influencing factors on the ascertainable value of the TAD.

It is important to note that terms such as 'training', 'further training', 'continuing education', 'continuing training' or 'continuing learning' are used synonymously in this paper.

Education is a formal development activity, covering the general and vocational basic education of children and adolescents at school. It serves the primary systematic acquisition of job qualifications (expert skills, knowledge, experience), perhaps with a formal degree. Mostly it is strongly organised and takes place at technical colleges, basic vocational schools and universities. Normally,



education is the main occupation of a person, with reduced or no employment during this period. A further delimiting characteristic of education as opposed to training is that education takes place to the extent of half a day or all day for a period of at least five more or less consecutive months. If, however, educational activities take place alongside employment (e.g. three hours once or twice per week) and there is no formal graduation, then, even if this activity lasts several years, it is called further training rather than basic vocational education. An Italian course with sessions of two hours per week over a longer period (perhaps some years) is a typical example of such a case.

Further training is a formal development activity like education and, as a rule, is marked by the following main characteristics: more or less systematically and formally organised, led by an instructor, short to medium duration, undertaken alongside some gainful occupation or in periods of unemployment. It can take place at training institutions as well as in enterprises or even by way of an educational trip. Usually it follows basic education, but not necessarily, because training can also be used for the creation of (narrowly defined) basic abilities of unskilled employees to perform a specific task. In summary, further training in the German language area serves to consolidate, expand, and renew basic knowledge, to retrain for new qualifications, and to develop new specific skills for narrowly defined work areas.

Further informal development takes place without an instructor, away from schools or course facilities and without any systematic (formal) organisation. Instead, it arises out of everyday work or everyday life, either quite unconsciously or in a more purposeful way (e.g. private study with literature) and therefore is often a by-product of work and leisure activities. Informal development activities include using the media, self-study material, learning on the job along with possible instructions from colleagues or supervisors, visiting fairs, attending conferences, travelling 'with one's eyes open', or also a change of enterprises and jobs. It can also occur in a more targeted scheme as self-study which, however, clearly differs from externally organised self-study as basic education or further training such as correspondence courses.

This delimitation is necessary and helpful, but if one considers the potential diversity of development activities it is impossible to draw a clear boundary between formal and informal further development activities in each individual case; the transitions are fluid and the classification must thus sometimes be decided. A trend can be observed, moving away from education and towards training on the firm's premises and towards integrated learning at the work place. Therefore, in the future, academia, further training institutions, etc., will probably have to consider an increasing mixture of education, further training, and informal development activities that will often take place at work. Also, distance learning and systematic (computer-supported) self-tuition are expected to increase and must therefore be more carefully noted as factors influencing qualification development. These developments significantly cloud the boundary between further training and informal development activities. The characteristics 'organised' and 'guidance by an instructor', however, offer an unambiguous delimitation in most cases.

Operational definition of the term 'TrainingActivityDegree'

The TrainingActivityDegree is defined as the total of further training activities during a limited period (e.g. five years). For example, where the activity unit is measured in days and the duration unit is measured in years, the TAD is the ratio of 'average training days per year' (Langer, 2000-01), calculated as: activity units (days) divided by duration units (years). As one can see, the formula can be used for a variety of time variable combinations for both activity unit (hours, days) and duration unit (months, years).

For the first-time use of TAD data, presented below, the activity unit is the day. As limited and uncertain memory is a significant obstacle to the collection of data over longer periods such as years, the aim was to avoid false expression of exactness by using day units instead of hour units. In gathering the data, half days and whole days were established as the calculation units (0.5 day; 1.0 day; 1.5 days; etc.), where half-day units are 4 hours (with a span from 1 to 5 hours) and day units are 8 hours (span of 6 to 10 hours,

if completed on 1 day). It should be noted that the empirical observations mostly occur around four hours and seven to eight hours (see in detail Langer, 2000-2001). If a training unit is originally specified in hours, e.g. 120 hours, then the factor '8' is used for computing the day units, in this case 15 days. The factor '8' would also be used for a transformation of TAD values between day and hour units.

The observation period, represented by the duration unit, can vary. In the current research, which examines the further training of workers in the accommodation trade in Germany and Austria, the observation period was determined to start at the age of 18, or at the completion of vocational education if later than the age of 18. For the period of observation, several variables were selected, including the 'total relevant period' (trp). In practice, the total relevant period can extend to 50 years, covering the full potential period for training in worklife.

Decisions on the observation period must be preceded by an analysis of the disadvantages and advantages of each. A one-year period demands relatively high precision in interviewee statements; however, it is very short and only can be applied in situations with a general high level of training in an organisation or industry; even in such cases, the probability of a bias by mistake could be high. For the accommodation trade, which in general shows a low level of training participation and often interruptions of many years (perhaps because there is no actual necessity for training), research periods of 5 or 10 years, or even the total relevant period, must be preferred, although relatively inexact data on the frequency and the duration of individual training activities have to be expected. Furthermore the question arises as to what relevance training activities which occurred, for example, 15 years ago could have in a model using TAD as a dependent variable for determining current training behaviour. In such a model, age would also play an important role as an explanatory factor.

The selection of eligible training activities for the measurement of the TAD mostly depends on the objective of the research or the statistics. For example, participation in obligatory courses may be excluded if the object of the research is the TAD in relation to attitudes and situational factors of individuals. In contrast, obligatory courses are to be included if the object of research is the effect of training on income in relation to the TAD or a correlation between the TAD and career (Riley and Ladkin, 1994). A further selection criterion is the topical subject of training measures, which can be limited e.g. to the current occupation, to the organisation of employment, to the industry, or to any training measures during the total relevant observation period.

Computation of the TrainingActivityDegree

The computation of TAD can be demonstrated from its first application.

The following concrete questions for assessing the TrainingActivityDegree were part of an extensive questionnaire, preceded by a definition of 'further training' including a delimitation regarding basic education and informal development activities. On this basis, 'personal further training activities undertaken hitherto', i.e. those activities since finishing basic education up to the date of the interview, were to be stated in a table.

The statements about training activities were collected through extensive questioning, allowing sufficient time for the interview. Occupation-specific training activities for the current occupation and further training activities for former or future occupations outside the accommodation and restaurant trade were considered. The following questions do not only yield important information on the partial aspects of training activities but also served as an aid to memory for the interviewees during the data collection process:

(a) training activities: topic and organisation of training measures (e.g. individual schooling on the job, course in a group);

(b) provider and place of training (name of the provider, schooling rooms, hotel, etc.);

(c) reason for training (obligatory for occupation, need of a certificate, interest, etc.);

(d) dates of training activities (if possible: day/month/year) and duration of each measure (hours, days, weeks, months);

Result regarding the gathering of time aspects with item (d):

years	activities and duration of activities (days, hours per day)	**sum per activity** in day units
1998	a five-day course about 'health food', each day approx. 8 hours	5.0
1999	a half-day (4 hours) instruction on the job about 'industrial hygiene'	0.5
2000	no activity	0
2001	a one-day course about 'Viennese sweets' (7 hours)	1.0
	a three-day course about 'human resources management', with two days approx. 8.5 hours and one day 4 hours	2.5
2002	no activity	0

sum of years: 5 **sum of training days: 9.0**
computation: 9.0 **training days: 5**
years = 1.8 **training days per year (TAD = 1.8)**

(e) other time aspects (week days, time of day);

(f) rough cost-benefit evaluation of individual training activities and of the stimulus to future course attendance.

The average training day units per year are calculated with the statement on time aspects (d) together with the number of relevant years. The calculation can be illustrated by the following example of a maximum five-year reference period from 1998 to 2002 with specific training measures of a cook as interviewee (survey conducted in January 2003).

The result is a total of nine training days attended in five years, giving a TAD of 1.8. Minor adjustments such as the charging of seven-hour days or of 8.5 hour days as standardised eight-hour days are accepted.

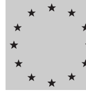
Categorization, representation and applications of the TrainingActivityDegree

TAD data are interval scaled and, as such, are well suited to use in statistical analysis. However, for presentations in tables or figures a categorisation by individual features grouped in ordinal scales is necessary. The first step towards forming categories is a screening of data distribution; rough indications were provided by trials in various sectors and by pilot interviews. This distribution yielded large differences, e.g. between the financial sector and the accommodation trade. Further, the TAD data in the latter show a broad spectrum of observations starting with a focus in the range between 0 to 3.5 and decreasing frequencies to values around 10 and above; in individual cases values between 30 and even 40 average training days per year were documented (Langer and Naschberger, 1999-2001; Langer and Naschberger, 1999-2002).

The relatively few training activities in the accommodation trade required narrow stages in the low-activity categories and increasingly wider stages in correlation with the decreasing frequency. This staging is also based on the assumption (Langer, 2000-01) that if the distribution of TAD data is focused on zero or very low, finer gradations can be explained by certain configurations of influence factors, whereas, for an increasingly higher TAD, the width of the appropriate TAD category can be attributed less to configurations of general exogenous influence factors than to coincidental individual factors.

The number of categories will depend on various factors such as the sample size, the distribution of specific TAD data, the research objectives, and an acceptable size for the data presentation. As a general model, a 10-step category system has been developed (Langer, 2000-01). As was the case in the current project, if a large number of low TAD values and very few high values occur, it is necessary to reduce the spectrum of categories, e.g. by summing up the highest category. In the current example, seven categories were defined with a range from category 1, TAD is zero (inactive person) = 0 days/year up to category 7, TAD is fairly high to extremely high = 10.0 or more days/year. This seven-step category system has been employed for the presentation of data in figure 1 and further a four-step system is demonstrated in table 1 (both see below).

Since the TAD is a ratio with a potential for manifold specifications, it is necessary to use acronyms and abbreviations for an efficient presentation, e.g. for the specification



of the observation period (5 or 10 years, total relevant period = trp):

version 1: TAD5 TAD10 TADtrp

version 2: TAD-5 TAD-10 TAD-trp

Further specifications according to individual theoretical and empirical goals can be:

❑ individual person (ind) or organisation such as enterprise or other (org);

❑ sector such as industry, branch, trade etc. together with specification (e.g. finance sector = fin, pub = public sector, tou = tourism sector);

❑ country specification (international abbreviations), e.g.: UK, US, D, A;

Practical examples of combined specifications are:

- TAD10, org, US or TAD-10/org/US

- TAD3, ind, fin, uk or TAD-3/ind/fin/UK

At the present state of research (Langer, 2000-1) three main applications of the TrainingActivityDegree ratio can be described:

❑ statistical recording of training activities to allow comparative analysis, e.g. between countries; explanatory or dependent variable in explanatory models (Langer and Naschberger, 1999-1; Bernini et al., 1999; Langer, 2000-1; Langer et al., 2001); other statistical applications;

❑ evaluation of the success of training investments on the meso- or macro-level of industries and countries;

❑ evaluation of individuals (or of groups) in the recruiting process, with regard to performance in the workplace or to success of training investments at micro-level (human resources management of organisations).

Examples for the application of the TAD in statistics, in comparisons, and for testing hypotheses are shown below.

Empirical Method

The data in this study were gathered in the context of a larger transnational survey and analysis project regarding the Austrian and Bavarian Alpine tourism industry, focused on the extent of training activities and on explaining variations of training activities.

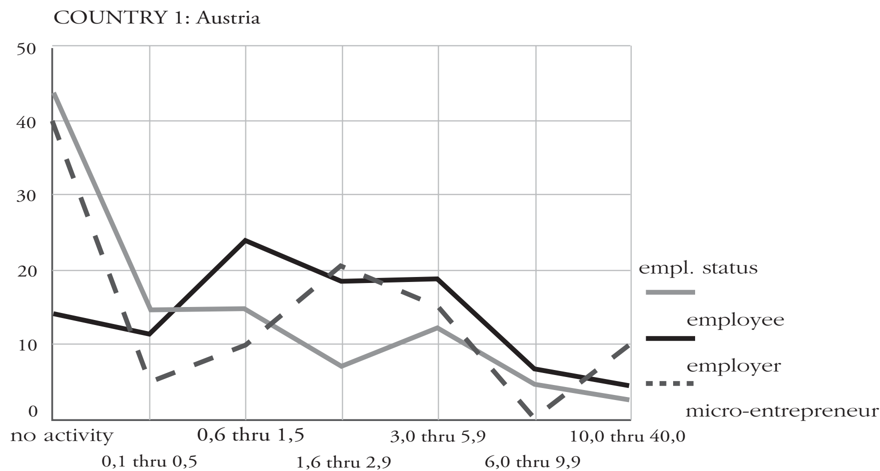
Setting and sample

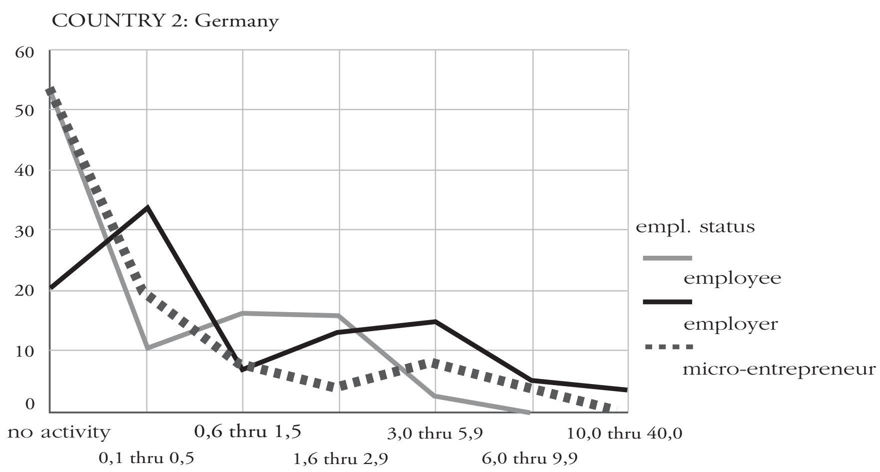
The empirical research process included 4 consecutive steps (see details in Langer and Naschberger, 1999-2001; Langer, 2000-01): expert interviews (approximately 5 per country), pilot interviews with entrepreneurs and employees (approximately 25 per country), an exploratory small sample (approximately 100 interviewees per country) and a final large sample (approximately 430 interviewees per country).

The results of this first use of the TrainingActivityDegree come from an exploratory quota sample. This accepted approach was sufficient for gaining a first solid insight, without claiming representative statistical results. A random sample is possible in the entrepreneur segment but the employee segment is affected by lack of data due to the European law on privacy. Even the quota method meets limitations when applied to the accommodation trade (for statistics problems in tourism see also Latham, 1989), because population data are restricted due to inadequate statistical records. The necessary population quotas have to be roughly calculated on the basis of several data sources. Statistical problems also arise through seasonal fluctuations, which are typical for this branch, and also over the qualifying date (taking the day of data collection in high season or outside the season causes a significant difference in employees counted).

Participants in the quota sample were 217 workers in small accommodation enterprises (Bed and Breakfast, inn, hotel) in summer 1998, with 103 interviewees in Austria (42 employees, 41 employers, 20 micro-entrepreneurs) and 114 in Bavaria (37 employees, 53 employers, 24 micro-entrepreneurs). The employees work for the employers in the sample (mostly pairs of one employer and one employee). These employers are owner-managers or entrepreneurs (or, in a few cases, dependent managers) with between 2 and 49 full-time employees. Micro-entrepreneurs are owner-managers with no more than one employee. These segments are treated as 3 samples, each fitting the population data concerning age and gender; altogether approximately 60% are female). These three samples are represent-

Figure 1: TrainingActivityDegree (TADtrp) of three employment segments in the accommodation trade in Austria and Germany





TrainingActivityDegree (total relevant period)
Sample: 214 cases, no missing case; percentage (%) of valid cases; TAD in average days per year;
Note: instead of dots we use commas as a separator betwen whole number and fraction.
Source: Langer and Naschberger, 1999-1 and 1999-2 (Leonardo project "Training requirements in tourism", exploratory survey 1998)

ed together in the total sample category in some instances. In the case of the respective quotas for individual segments they could represent the 'working people of the accommodation trade'. However, this is not a valid assumption since the ratio of population data to quota data is very different in each of the three occupational segments, e.g. there are considerably more employees than employers in reality but not in the sample. In general, the significance of the results is limited to the interviewees included in the sample (Langer and Naschberger, 1999-2001).

Field research

The data collection was conducted through face-to-face interviews with a questionnaire conducted by highly qualified interviewers. This assisted the low refusal rate, first because those surveyed in the tourism industry prefer a comprehensive personal interview rather than completing a questionnaire on their own and, second, it enabled clarifying questions, thereby ensuring high quality responses. The sampling and collecting process was subjected to an external autonomous quality control, which confirmed the high quality (Langer and Naschberger, 1999-2001).

Statistical analysis

A further methodological aspect is the statistical analysis of the quota sample results, which followed the principle of exploratory data analysis (EDA). The interval-scaled TrainingActivityDegree data are not distributed normally but follow an F distribution. For this reason only non-parametric methods can be employed in the research on differences and correlations.

Results

The survey of the data was a main objective of the underlying project since only vague data existed up to this point. It should be mentioned that previous sources, including official statistics and results of various studies (Boer et al., 1997; European Commission, 1997; Langer, 1988a; Schmidt, 1996; Zeidler, 1990) indicated a low level of further training activities among employers and

employees of small tourism enterprises in general.

The data are partly presented by diagram and cross-tabulation and they test differences of feature characteristics for the attributes 'country', 'employment status', 'age' and 'gender'.

Comparisons of three employment segments in two countries

Diagrams, a table, and statistical test methods are used for the comparison of TAD results of the employment segments.

Figure 1 (see below) demonstrates clear differences in the TAD according to employment status. Similar pictures are found in both countries, with employees and micro-entrepreneurs featuring a high percentage of 'no activity'; in Germany this is over 50%. The employer segment shows a noticeably lower figure for 'no activity'. In the majority of cases, they prove the most active segment.

The following tests of these TAD results in the three employment segments, within the particular country and between the countries, confirm the visual analysis in figure 1, because they show highly significant differences.

If the two-tailed significance level is 0.05 or higher, then there is not quite enough evidence to reject the null hypothesis that the observations are independent. This may be the case for the comparisons (2) of each of the employment segments between the countries. Although the test of the total sample (1) in the two countries yields a significantly higher TAD in Austria, the null hypothesis can almost be rejected on the superior 0.01 level, supposedly caused by the increased sample size. The tests within the countries (3) yield highly significant results for independent observations in the segment 'employer' in relation to 'employee' in both countries. This counts as well for the pair 'employer' versus 'micro-entrepreneur' in Germany, while the tests for the other pairs do not allow rejection of the null hypothesis.

Database:
Exploratory survey in 1998 (description see above) in the accommodation trade with samples of three employment segments in two countries (A = Austria, G = Germany); altogether six samples which can be pooled to a total sample. Most of the interviewees (approximately 75% overall) have finished school education, e.g., referring to the Austrian educational system, the combination of primary school or lower secondary school and vocational education up to three years. Some (approximately 10%, mainly women) have completed the primary education level only, or they have finished a secondary and, in a few cases, even tertiary education. It should be observed that the interviewees are mostly a demographic group with "standard education" and with a more or less reluctant activity behavior in regard to formal education, learning, and development.

Data:
ratio scaled data of the variable TADtrp (note: figure 1 presents these data ordinal-scaled); F distribution;

Test hypothesis:
null hypothesis - the population means are the same of each of the independent groups tested in pair;

Test method:
non-parametric test of median difference, Mann-Whitney, Asymptotic Signific. (2-tailed);

Abbreviations:
A = Austria, G = Germany; p = significance level;

Test results:

(1)	total sample (A) * total sample (G)	p = 0.014	
(2)	employee (A) * employee (G)	p = 0.312	
	employer (A) * employer (G)	p = 0.051	
	micro-entrepr. (A) * micro-e (G)	p = 0.116	
(3)	employee * employer	p = 0.003 (A)	p = 0.007 (G)
	employee * micro-entrepreneur	p = 0.397 (A)	p = 0.815 (G)
	employer * micro-entrepreneur	p = 0.243 (A)	p = 0.005 (G)

Employment segments (grouped by country), tested by gender

Differences of training activities by gender are often reported, so a general working hypothesis could argue that female workers participate less in training than male workers. However, in the accommodation trade the gender-related working hypothesis would be identical with the test hypothesis that says there is no difference. (Database, test hypothesis, and test method see above.) Table 1 demonstrates exploratory results for the Austrian and German accommodation trade.

The comparison of column rows for female and male groups in table 1 shows slight differences for the individual employment segments (and the row total); this picture is confirmed by the tests.

Table 1: TrainingActivityDegree (TADtrp) in the accommodation trade in Austria and Germany, cross tabulated by 'employment status' and partitioned by gender

gender				employment status: employee	employer	micro-entrepreneur	row total
male	TAD trp-c4	no activity in the relevant period	cases % of employment status	13 52,0%	9 17,6%	6 42,9%	28 31,1%
		very low thru low: 0,1 thru 0,9	cases % of employment status	6 24,0%	10 19,6%	4 28,6%	20 22,2%
		low thru moderate: 1,0 thru 2,0	cases % of employment status	3 12,0%	11 21,6%		14 15,6%
		middle trhu very high: 3,0 thru 200	cases % of employment status	3 12,0%	21 41,2%	4 28,6%	28 31,1%
column cass sum			cases % of employment status	25 100,0%	51 100,0%	14 100,0%	90 100,0%
female	TAD trp-c4	no activity in the relevant period	cases % of employment status	25 47,2%	8 18,2%	15 50,0%	48 37,8%
		very low thru low: 0,1 thru 0,9	cases % of employment status	10 18,9%	16 36,4%	4 13,3%	30 23,6%
		low thru moderate: 1,0 thru 2,0	cases % of employment status	8 15,1%	6 13,6%	2 6,7%	16 12,6%
		middle thru very high: 3,0 thru 200	cases % of employment status	10 15,1%	14 31,8%	9 30,0%	33 26,0%
column percentage sum			cases % of employment status	53 100,0%	44 100,0%	30 100,0%	127 100,0%

Source: Langer and Naschberger, 1999-1 and 1999-2 (Leonardo project "Training requirements in tourism", exploratory survey 1998)

The test of the total sample (217 interviewees), grouped by gender, shows a slight higher TAD of male interviewees (mean ranks: f = 106, m = 114); however, the difference is not significant ($p = 0.328$) and the null hypothesis therefore cannot be rejected. The picture of results repeats for tests of the individually paired gender segments.

Discussion

This paper has focused on describing the development of a universally applicable method for the measurement of further training activities and an example of using this method in statistics and statistical analysis. The description starts with a definition of

terms in the field of training and development, which in future ought to be extended towards a multilingual approach, e.g. by extending current standards of Cedefop publications. A clear distinction between basic education, further training (continuing education) and informal development would be a substantial advance for international comparative research and statistics as well, since use of non-comparable data is detrimental. Even simple statistical comparisons are affected substantially by different definitions. Because of the potential for substantial variances, hypotheses and explanatory models must not be formulated and tested without a clear definition of the dependent variable 'training' or other output measures; otherwise the result could be substantially different and be neither externally valid nor reliable.
For analytical models of behaviour related to formal training, on the one hand, and informal development, on the other, the distinction between these types of development is particularly important because both are fundamentally different and could have differing relevance for the various worker segments. For example, the hypothesis can be formulated that people with little basic education have a disposition towards informal development processes like learning by practical actions (at the work place), experience in several organisations, or learning by brief instructions. In contrast, formal development measures often are avoided because they are equated with sitting at school, listening to a teacher, experiencing discomfort and undertaking exhausting examinations. Some learning types do not function well in school-type learning, which is why the current trend towards combinations of formal and practical (informal) learning processes should meet their requirements better. These reflections on the advantages of informal and the disadvantages of formal learning situations reinforce the need to distinguish between the strengths and weaknesses of formal training. A conscious decision to undertake training, normally including specific expenditure and time costs, differs fundamentally from informal development, though formal training normally allows a relatively rapid and targeted acquisition of qualifications. However, despite the fact that the difficulties of distinguishing between formal and informal development will increase in the future due to the trend to combine the two, the distinction between purely informal development, undertaken by everyone, and formal training should be respected in research.

Test results:
segments of the total sample:
- 2 countries: A = Austria, G = Germany;
- 3 employment segments: employee, employer, micro-entrepreneur;
- 2 gender segments: f = female, m = male;

(1) female total * male total	p = 0.328
(2) employee (f) * employee (m)	p1) = 0.640 (A); p1) = 0.555 (G)
employer (f) * employer (m)	p = 0.236 (A); p = 0.964 (G)
micro-entrepr. (f) * micro-e. (m)	p1) = 0.437 (A); p1) = 0.259 (G)

p1) In these cases the SPSS programme due to low frequency of segments automatically tests with the Exact-test;

In addition to the definition problem regarding the term 'training', other potential problems which can distort activity data measured by the TAD must be addressed; one such potential problem is inadequate definition in questionnaires leading to incorrect statements by interviewees. Confusion of the length of the observation period can cause interviewees erroneously to assign further training activities to the selected observation period, e.g. including training activities from the year 1994 even though the observation period is from 1996 to 2001. Interviewees may also forget to report individual training measures as a whole or report a wrong number of training days. Measuring the TAD in rough day units instead of hour units can distort the result as can inadequate categorisation or statistical treatment of TAD data (in detail see Langer, 2000-01; Langer, 2003b). Yet similar potential errors can arise with the use of other output measures, which normally have additional significant problems. That is why the TAD is presented as a new option for bridging the knowledge gap, complete with suggestions for its definition, varying observation periods, categorisation, representation, and application examples. The TAD is a potential inclusion in efforts towards a new commonly accepted method for measuring training activities universally.

The examples of the TAD being used in statistics and testing hypotheses have demonstrated its practical benefit for scientific work as well as for administrative and political purposes.

Regarding the original research objective, the determination of the extent of training

activities in the Austrian accommodation trade, the TAD measurement is significantly higher than has been supposed in anecdotal situation reports and conjectures in recent years. The exploratory results of the current investigation contradict such perceptions, even if there are few interviewees who participate continually in further training and thus exhibit a higher TAD, e.g. an average of 10 or more training days per year. In any case, a great number of workers in tourism have taken part in further training at least occasionally and this result is definitely new. Nevertheless, it should be admitted that the average TAD should be relatively low in comparison to many other industries. Unfortunately, comparative TAD data do not exist at this point.

It must be pointed out that the TAD, as it is defined here, measures the quantity of training activities and nothing else. Quality aspects such as the training offer, the learning effect during training periods, and the implementation of new knowledge, remain untouched. These factors are of substantial relevance if the effect of training activities, e.g. on the income of employees or of the performance of organisations, is analysed. These aspects are even of relevance with regard to the long-range development of an individual TAD, because bad or futile training experience can cause a negative attitude, or at least absence from training activity (Bates, 2001). As such a tool, in terms of a combined ratio of quality and quantity factors is important, future research could develop a new method.

Finally it should be emphasised that the TAD data presented here are rough first-time results of a newly developed instrument for assessing and presenting training activities. In the future, data quality could be raised by a refinement of the whole survey process, including increased time inputs. Limits on costs or access to exact data will often prevent this, at least for a complete sample. As a tolerable solution to obtaining sufficient information about data quality, a small control sample could be obtained through very exact collection of training data. This would, among other things, require spending much time on the survey and using serious sources such as organisation data, information from training providers, accounting documents, certificates or confirmations of participation in courses. The recording of training participation, for which the Record of Achievements in the UK is a good example, may also contribute.

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Europe International

Information, comparative studies

Lifelong learning: potential and constraints with specific reference to policies in the United Kingdom and Europe / Paul Ryan.
International Labour Office - ILO, In-Focus Programme on Skills, Knowledge and Employability
Geneva: ILO, 2003, 33 p.
(Skills working paper, 15)
ISBN 92-2-113658-2; ISSN 1609-8412

In this paper Paul Ryan takes a critical look at lifelong learning policies as they have evolved in recent years, particularly in Britain and elsewhere in Europe: goals and content; attributes of lifelong learning; trade unions and partnership.

Labour market and social policies in the Baltic countries.
Organisation for Economic Cooperation and Development - OECD
Paris: OECD, 2003, 181 p.
ISBN 9264100067

The Baltic States - Estonia, Latvia and Lithuania - have made impressive progress since the early 1990s. They have now almost completed their preparations for accession to the EU. Most elements of labour-market and social policy have been thoroughly reformed over the past decade. However, several difficult policy questions need to be addressed in response to changing economic conditions. This OECD Policy Review analyses the key issues facing each country given its specific economic and social trends. It draws both positive and negative policy lessons from OECD experience. It also identifies Baltic policy initiatives, such as pension reforms, which are more advanced than those adopted in most OECD countries. Fac-ing high unemployment, modest incomes and more unequal income distributions than many European countries, Baltic policy makers have limited room for manoeuvre. In employment policy, a paramount goal must be to improve the institutional framework for innovation and job creation. Social spending needs to be contained because taxes and social insurance contributions are relatively high, placing a heavy burden on employment. This report provides detailed information and policy recommendations in five topical areas: labour law; 'active' and 'passive' labour market policies; pension reform; long-term care of the elderly; and social assistance benefits as a last resort.

Entrepreneurship and local economic development: programme and policy recommendations.
Organisation for Economic Cooperation and Development - OECD
Paris: OECD, 2003, 240 p.
ISBN 9264199780 (en)

The scope, number and growth of programmes supporting entrepreneurship and microenterprise across OECD member countries is striking. Much of the policy interest in encouraging entrepreneurship reflects a belief that the creation of new firms will help achieve important economic and social objectives. Increasing rates of enterprise creation is an almost universal concern for local authorities and for central governments wishing to combat localised economic distress. However, despite the extent of policy interest, few studies have systematically examined the relationship between the birth of new firms and local economic development. This publication examines the principal routes through which enterprise creation and development can impact on local economies. Empirical evidence on the relationship between entrepreneurship and local economies is reviewed. It is shown that while entrepreneurship is a critical component of local economic development, the promotion of entrepreneurship does not constitute a developmental panacea. A number of potential limits to entrepreneurship-oriented strategies - and how these limits might be countered - are considered at length. This book sets out detailed policy recommendations for both national and local levels of government. These recommendations cover three thematic areas: strategy, finance and programme design. It is hoped that these guidelines will assist local and central governments in designing and implementing cost-effective entrepreneurship strategies and programmes. This publication also describes the types of research that should be undertaken in order to

improve understanding of the key policy issues.

European Union: policies, programmes, participants

Common Position (EC) No 48/2003 on 16 June 2003 adopted by the Council, acting in accordance with the procedure referred to in Article 251 of the Treaty establishing the European Community, with a view to adopting a multiannual programme (2004 to 2006) for the effective integration of information and communication technologies (ICT) in education and training systems in Europe (*e*Learning Programme)
European Parliament and the Council of the European Union.
Official Journal of the European Union C 233 E3, 30.9.2003, pp. 24-34 (2003)
Luxembourg: EUR-OP, 2003

This is the common position for the Decision establishing the eLearning Programme, which is a multi-annual programme for the improvement of the quality and accessibility of European education and training systems through the effective use of information and communication technologies (ICT) from 2004 to 2006.
URL: http://libserver.cedefop.eu.int/vetelib/eu/leg/copo/2003_0048_en.pdf

Council Resolution of 6 February 2003 on Social Inclusion - through social dialogue
Council of the European Union
Official Journal of the European Union C 39, 18.02.2003, pp.1-2 (2003)
Luxembourg: EUR-OP, 2003

Returning back to the problem of social inclusion, the Council adopted a resolution in which it invites the Commission: 1) to continue to promote social dialogue and partnership in the context of an enlarged Union as a means of promoting social inclusion at national, regional and local levels; particular emphasis should be placed on prevention, including keeping people in jobs, and remedial measures; 2) to ensure that particular attention is paid to the full integration of social inclusion in the economic and social strategy of the Union; 3) to continue to collect and analyse national, regional and local examples of social inclusion through social dialogue and partnership, in order to help disseminate examples of good practice, in terms of stake-holders, target groups and models for collaboration.
URL: http://libserver.cedefop.eu.int/vetelib/eu/leg/res/2003_c39a_en.pdf

Council Resolution on 15 July 2003 on Social and Human Capital Building social and human capital in the knowledge society: learning, work, social cohesion and gender
Council of the European Union
Official Journal of the European Union C 175, 24.07.2003, pp.3-6 (2003)
Luxembourg: EUR-OP, 2003

With this Resolution the Council calls on Member States to consider the social and human capital elements in the planning, development and implementation of their policies and initiatives, in particular as regards the following areas: learning, work, social cohesion, and gender. 'Human capital' is defined as 'knowledge, skills, competencies and attributes embodied in individuals that facilitate personal, social and economic well-being' and 'social capital' as 'networks and participation in public life together with shared norms, values, culture, habits and practices, trust and understanding that facilitate cooperation within or among groups to pursue shared objectives.
URL: http://libserver.cedefop.eu.int/vetelib/eu/leg/res/2003_175b_en.pdf

European eSkills summit report: Copenhagen. 2002
European Commission; eSkill summit Industry Consortium; European Union. European Presidency
Brussels: EUR-OP, 2003. - 31 p.
ISBN 92-894-5494-6

The eSkills summit is a unique opportunity to learn how the e-skills challenge has been and can be successfully addressed by stakeholders in both the public and the private sectors. These initiatives range from individual projects targeting specific groups in society to high-level policy actions that have been endorsed by EU Heads of State and Government. Different forms of partnership have also been formed as a means of bringing stakeholders together and ensuring that synergies are created and that efforts are not being duplicated. The purpose of this page is to capture as many of these initiatives as possible to award recognition to those that are making great strives towards

the ultimate goal of bridging the e-skills gap in Europe.

Framework of actions for the lifelong development of competences and qualifications: first follow-up report 2003.
Union of Industrial and Employers' Confederations of Europe - UNICE
European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest - CEEP
European Association of Craft and Small and Medium-sized Enterprises - UEAPME
Brussels: UNICE, 2003. - 69 p.

The first follow-up report, issued in March 2003, describes how the framework of actions has been included in social partner activities as regards the development of competences and qualifications in Member States. It also gives information on the actions taken at cross-industry, sectoral and company level, illustrated by examples of good practice where appropriate.

Intercultural competence / Gerhard Neuner [et al.]
Neuner, Gerhard
Council of Europe - COE
Strasbourg: COE, 2003. - 146 p.
ISBN 92-871-5169-5 (fr)
ISBN 92-871-5170-9 (en)

This collection of four articles offers a radical new view of intercultural competence. It places language teaching in a wider context, demonstrating that it has political and ethical implications of the kind found throughout education. Language teaching is not just a professional skill, but a social activity of major significance in the contemporary world.

Proceedings of the twentieth CEIES seminar labour statistics - towards enlargement: Budapest, 14 and 15 November 20002.
European Advisory Committee on Statistical Information in the Economic and Social Spheres - CEIES
Luxembourg: Office for Official Publications of the European Communities, 2003. - 200 p. - (Theme 1 - General statistics)
ISBN 92-894-5296-XISBN 1725-1338

The seminar on 'Labour Statistics - towards enlargement' follows a trend set in earlier seminars organised by the subcommittee on Social Statistics to discuss in depth social issues that require input from varied statistical fields. Precursors are among others the seminar on Social Exclusion (London, 1999), on Education and Training Statistics and the Functioning of the Labour Market (Thessaloniki, 2000), on Health and Safety at Work (Dublin, 2001) and the seminar on Life-Long Learning (Parma, 2001). The aim of this seminar is to bring together data users and producers to discuss data availability, user needs, statistical lacunae, limitations of currently available data and their treatment in the light of new policy needs and priorities; and consider what can be done to respond more effectively to the changing needs and policy context in the future. Overall, this seminar will make a contribution to the discussion on challenges put forward on labour-market issues by enlargement to the candidate countries and the existing member states of the Union and policy considerations. The particular objective of the seminar will be to inform participants from the EU Member States about the experiences of the accession countries and provide the opportunity to highlight any possible difficulties or problems that may be encountered. This should initiate an exchange of information between producers and users of statistics, of labour market experts in the Member States and the applicant countries. It is intended if possible to identify specific labour market phenomena occurring in the candidate countries. Special statistical issues, such as how to measure and present the informal labour market, the gender gap, sectoral and educational differences, and different levels of labour costs would be of particular interest. Another principal theme of the seminar will be the predicted labour migration and projections after enlargement.

Recognition issues in the Bologna Process
Bergan, Sjur
Council of Europe - COE
Strasbourg: COE, 2003. - 292 p.
ISBN 92-871-5150-4

The Bologna Process, aiming to establish a European Higher Education Area by 2010, is the most important higher education reform process in Europe since the immediate aftermath of 1968. Making it easier for students and holders of higher education qualifications to move around Europe is one of the key goals of this process, and facilitating the recognition of qualifications is one of the preconditions for this goal to be realised. This book sets out to take stock of

the recognition of qualifications in Europe, and to highlight policies that will help make the European Higher Education Area a reality. The authors are recognition specialists and higher education policy-makers from several countries in Europe and worldwide.

Second annual report on the implementation of innovative measures under Article 6 of the European Social Fund regulation during 2001 / presented to the ESF Committee on 17 December 2002.
Brussels: European Commission- Directorate-General Employment and Social Affairs, 2003. - 31 p.

These measures were directed at a wide range of organisations working in or around the labour market. Project promoters include social partner organisations operating at regional, national and European level, vocational training institutions and universities, independent research institutes and foundations as well as private companies, development agencies and NGOs. All projects are based on a partnership approach with social partner organisation. Projects were required to be transnational in scope, i.e. directed at staff of enterprises in two or more Member States. Transnational activities include actions aimed at the exchange of experience, expertise and good practice, the transfer and adaptation of methods and tools, and the joint development of new approaches and pilot projects in response to demands and needs in different Member States. The projects address one or more of five themes, under the general heading of 'Adaptation to the new economy within the framework of social dialogue', namely: 1. Anticipation of economic and social change; 2. Use of Information Society tools in the framework of social dialogue; 3. New approaches to Corporate Social Responsibility; 4. Modernisation of work organisation; 5. Promotion of lifelong learning.
URL: http://libserver.cedefop.eu.int/vetelib/eu/pub/commission/dgesa/2003_0004_en.pdf

Trade union memorandum to the Italian Presidency of the European Union July- December 2003
European Trade Union Confederation - ETUC
Brussels: ETUC, 2003. - 11 p.

In its memorandum to the Italian Presidency, the ETUC proposes policies to strengthen the European social dimension. According to John Monks, ETUC General Secretary, 'The Intergovernmental Conference must ensure a democratic, modern and social Constitutional Treaty for Europe. The Union must launch an emergency package of measures, consistent with the Lisbon goals, to address the immediate problems facing Europe and pursue the commitment to more and better jobs based on economic, employment and social cohesion policies'.

From the Member States

AT Erwachsenenbildung im Wandel: theoretische Aspekte und Praxiserfahrungen zu Individualisierung und Selbststeuerung.
[Adult training undergoing changes: theoretical aspects and practical experiences related to individualisation and self-guidance.]
Gary, Christian; Schlögl, Peter
Österreichisches Institut für Berufsbildungsforschung - ÖIBF
Vienna: Österreichisches Institut für Berufsbildungsforschung, 2003, 288 p.
ISBN 3-901966-05-6

Österreichisches Institut für Berufsbildungsforschung, Wipplinger Straße 35/4, 1010 Wien, Tel. (43-1) 3103334, Fax (43-1) 3197772, E-mail: oeibf@oeibf.at, *URL: www.oeibf.at*
In the current discussions on educational policy as well as in education practice, 'individualisation' and 'flexibilisation' are widely used terms. Expectations in relation to the concepts of self-directed, self-guided and self-responsible learning are high: the aim is to better meet the increasing demand for upgrading vocational skills and for continuing vocational training (CVT) while being able to take into account more efficiently individual education targets and needs. What are the challenges institutions for adult training and CVT have to face in this context? What are the consequences and chances for institutionalised adult learning? In this publication, Austrian and German authors explore possible future scenarios of CVT and skills training in Austria. This compi-

lation of contributions aims to serve as a starting point for creating concepts for organisational development and the development of offers and for analysing the topic in more detail.

BE La formation professionnelle continue: l'individu au cœur des dispositifs / Jean-Luc Guyot, Christine Mainguet, Béatrice Van Haeperen. [Continuing vocational training: the individual as the focus of legal provisions]
Brussels: De Boeck, 2003, 379 p.
(Economie, société, région)
ISBN 2-8041-4306-6

'Based on various theoretical references and an analysis of original data, the studies compiled in this work help to throw finely shaded light on continuing vocational training seen from the angle of the individual. After first setting out the new contexts of continuing training, the work goes on to deal with the training of persons in employment and job-seekers. The contributions address the following themes: factors determining access to continuing training, reasons for dropping out, the impact of training on horizontal or vertical mobility, its effects on salary trends, its outcome in terms of socio-occupational work integration, and the pedagogical aspects of training in a work situation. The institutional and organisational dimensions of training will be examined in a later work.'

HR Social dialogue in southeast European countries: possibilities, limitations, perspectives: a comparative study / Darko Marinkovic. Action Plan for the Promotion of the Culture and Practice of Social and Civil Dialogue in the South Eastern European Region. Final Conference.
Thessaloniki. 2002
Belgrade, 2002, 92 p.

The subject of the project described is the concept and practice of the establishment and development of social dialogue in the countries covered by the Stability Pact. This issue encompasses a whole range of different aspects and is connected with all key areas of the life of society. This comparative study will encompass social dialogue in the following countries: Albania, Bulgaria, Serbia, Montenegro, Kosovo, Croatia, Bosnia and Herzegovina, Republika Srpska, Romania and FYROM.

CZ National action plan of employment 2003. Ministry of Labour and Social Affairs
Prague: Ministry of Labour and Social Affairs, 2003, 46 p.

In its Programme Declaration 2002, in the section on employment, the Czech Government proclaimed the achievement of full effective employment as the strategic goal of its term of office. The Government Programme Declaration stated, inter alia: 'The priority aim of the Government's active employment policy is to include the best efforts for reduction of unemployment, with the focus on the regions of North, Central and South Moravia and North-West Bohemia. The Government will support projects whose implementation will result in significant creation of new jobs, preferably within the regions at risk, and in the continued development of small and medium-sized enterprises. The Government will engage in steps which provide incentives to people to seek and maintain their jobs. In order to achieve these plans, the Government will present the new Employment Bill that will, inter alia, approximate employment policy instruments to the systems applied throughout the EU Member States. The Government will update the National Action Plan of Employment annually'.
http://www.mpsv.cz/files/clanky/4819/emp_2003_1.pdf

DK Statusundersøgelse af forsøg med kombinationsaftaler i erhvervsuddannelserne. [An investigation of experiments with combination agreements in vocational and educational training.] Andersson, Jens; Piil Hansen, Morten Danmarks Erhvervspædagogiske Læreruddannelse - DEL
Århus: DEL, 2003, 29 p.
DEL, Rosenørns Allé 31, DK-1970 Frederiksberg C., Tel. (45-35) 247900, Fax (45-35) 247910, E-mail: del-lib@delud.dk, URL: *http://www.delud.dk/*

In 2001, a new Act on Vocational Education and Training came into force in Denmark. One of the changes to be implemented was a new scheme for 'combination practical training agreements' in which training in the compensatory practical training scheme could be combined with practical training in companies that have been approved to provide part of the practical training. In order to experi-

ment with this new scheme, a number of experimental projects were initiated under the FoU programme. This publication documents the results of those experimental projects. The focus is on the number of combination agreements that have been entered into and on the barriers that the vocational colleges have encountered in promoting this new scheme. The preliminary results show that there are major problems in persuading enterprises to enter into combination agreements. So far only 35 combination agreements have been concluded.

Læring på jobbet: strategier og systematik, ideer og metoder.
[On the job learning: strategies and systematic approaches, ideas and methods.]
Astrup Christensen, Albert; Gottlieb, Susanne. Undervisningsministeriet - UVM, Uddannelsesstyrelsen
Copenhagen: UVM, 2003, 96 p.
(Uddannelsesstyrelsens temahæfteserie, nr. 6-2003)
ISBN 87-603-2314-0
Undervisningsministeriets forlag, Strandgade 100 D, DK-1401 Copenhagen K, Tel. (45-33) 925220, Fax (45-33) 925219, E-mail: uvm@uvm.dk, *URL: http://www.uvm.dk*

Teachers at vocational colleges face a number of challenges. They have to be able to differentiate teaching according to different types of students with different levels of proficiency. They have to be able to plan, implement and evaluate new types of training and take into account the learning pathways of the individual students. As a consequence, continuous competence development to keep the teacher skills up-to-date with new challenges has become a vital element in the colleges' strategies. This report forwards recommendations on how the colleges can work strategically and systematically with competence development on-the-job and in cooperation with colleagues, e.g., in teacher teams. The publication includes a number of practical tools that the colleges can use in their work formulating and implementing a strategy for developing the competences of both middle management and teachers.
http://pub.uvm.dk/2003/joblaering/

EE Access to adult learning in Estonia / Talvi Märja.
Adult learning: for employment and citizenship: international conference.
Kaunas. 2003
Kaunas: VMU, 2003, 6

As Estonia is becoming a full Community Member from 2004, the most important task is to acknowledge the new educational paradigm, which has been worked out by the European Commission and mostly emphasises the following: lifelong learning as a new possibility for all; the need to widen access to learning, especially to adult learning; the importance of building a new learning area. The Estonian Minister of Education initiated the process of elaborating a strategy for lifelong learning by calling outstanding persons from different fields of activities to draw up the White Paper on Lifetime Learning in Estonia. In order to given the working group members a better background for their work, some surveys were initiated for collecting the necessary data. The paper discusses the results of the surveys on adult learning, also the possibilities and current prospects of building the area of lifelong learning in Estonia.
http://www.vdu.lt/alearning2003/II%20Dalis/Talvi%20Marja_en.doc

FI Quality management of apprenticeship training: recommendation for use in apprenticeship training / National Board of Education.
Helsinki: OPH, 2003, 39 p.
ISBN 952-13-1683-7
Opetushallitus / Kirjasto, PO Box 380, FIN-00531 Helsinki, Tel. (358-9) 77477234, Fax (358-9) 77477869, E-mail: kirjasto@oph.fi, *URL: http://www.edu.fi/julkaisut*

Quality management (TQM) of apprenticeship training is considered to be a strategic tool for the organisers of training, such as the apprenticeship centres and offices, units or schools that are in charge of its management and supervision. The publication contains introductory texts on quality management along with attendant recommendations, whose aim is to assist the organisers in establishing for themselves suitable quality systems that will also work in practice. The appendices contain a list of the targets used in evaluating the quality of apprenticeship training, the terminology and quality concepts used in apprenticeship training, and a list of recommended reading on TQM.
http://www.edu.fi/julkaisut/quality.pdf

FR Démarche compétence: les partenaires sociaux mobilisés: dossier.
[The competence approach: social partners mobilised: dossier]
Anger, Michel; Sarazin, Béatrice
Travail et changement, No 287 (Avril 2003), p. 7-19
Lyon: ANACT, 2003
ISSN 1251-9200

Skills and competences, like qualifications, are leading subjects of social discussions. Last January ANACT-Agence Nationale pour l'Amélioration des Conditions de Travail (National Agency for the Improvement of Working Conditions) co-organised a seminar on this subject with the confederations of trade unions representing the employees. This dossier summarises the main points discussed on that day: how enterprises came to the competence approach, what tool should be used to evaluate the competence approach, how such an approach can be implemented in an economic sector or in an enterprise, finally, the opinion of the unions on the risks and advantages of the competence approach. The following contributions were compiled. Competence and negotiation: always an animated social dialogue, by Michel Anger. Method: from forward management of employment to the competence approach, by Michel Parlier. Tools: an evaluation grid - interview given by Olivier du Roy to Michel Anger. SPL Dentelles: tulle-makers recognised and their standing enhanced, by Christian Jouvenot. Lecomble and Schmitt (Pyrénées-Atlantiques): competences - a firm foundation, by Béatrice Sarazin. Union organisations: 'The tone has changed...', extracts compiled by Michel Anger and Michel Parlier.
http://www.anact.fr/competence/index.html

Devenir une vraie entreprise apprenante: les meilleures pratiques / Daniel Belet.
[How to develop into an effective learning organisation: the best practices]
Belet, Daniel
Paris: Editions d'Organisation, 2003, 217 p.
ISBN 2-7081-2836-1

In this work Daniel Belet gives practical advice on how to make an enterprise a learning organisation. After an examination of the strategic stakes involved in personnel management, he gives an in-depth presentation of the concept of the learning enterprise and proposes a general approach for the development of organisational learning, taking the examples of some enterprises as the basis.

DE Delphi-Erhebung zur Identifikation von Forschungs- und Entwicklungaufgaben in der beruflichen Aus- und Weiterbildung / Walter Brosi, Elisabeth M. Krekel und Joachim Gerd Ulrich.
[Delphi survey to identify research and development tasks in vocational education and training and continuing vocational training.]
Brosi, Walter; Krekel, Elisabeth M.; Ulrich, Joachim Gerd; Bundesinstitut für Berufsbildung - BIBB
Bonn: BIBB, 2003. - 32 p. - (Wissenschaftliche Diskussionspapiere / BIBB; 65)
ISBN 3-88555-731-2

In the context of a nation-wide Delphi study, the Federal Institute for Vocational Training (BIBB) interviewed experts about their views on the most important research and development tasks in the area of vocational education and training and continuing vocational training. The survey was designed to identify gaps in vocational education and training research and to place the planning of research on a broad footing. The first part of the publication is devoted to an overview of the development of the Delphi method and presents the results of a preliminary study carried out in 1999; the second part introduces conceptual considerations and research strategy decisions; part three explains the design of the multi-stage survey; and part four considers the extent to which in retrospect the results of the survey support these considerations and decisions.

Deutsche Berufsbildungskooperation weltweit: Potenziale erkennen, Synergien nutzen / Gisela Dybowski und Michael Gajo.
[German vocational education and training partnerships worldwide: recognising potentials, exploiting synergies.]
Bielefeld: Bertelsmann Verlag, 2003. - 65 p. + CD-ROM
ISBN 3-7639-0995-8
Dybowski, Gisela; Gajo, Michael
Bundesinstitut für Berufsbildung - BIBB

The report contains information on German vocational education and training partnerships in 45 selected countries. It is based on

a study that was designed to collect information on the approaches and structural elements of German vocational education and training efforts abroad and to provide an overview of ongoing projects, partnerships and the experiences of German institutions in the area of international education cooperation. The CD-ROM contains the 45 relevant country profiles and descriptions and the most important German institutions in the area of international vocational education and training partnerships.

GR Vocational Training Dynamic Development with a European Perspective: organisation of vocational education and training.
Organismos Epangelmatikis Ekpaidefsis kai Katartisis - OEEK
Athens: OEEK, 2003, 6 p.
OEEK, Ethnikis Antistaseos 41, Nea Ionia, GR-14234 Athens, Tel. (30) 210279000, Fax (30) 2102709144, E-mail: tm-t-v@oeek.gr, *URL: http://www.oeek.gr/*

The Organisation for Vocational Education and Training (OEEK) is the agent that plans, organises, operates and supports the initial vocational training in Greece. It has administrative and economic independence and is supervised by the Ministry of National Education and Religious Affairs. Furthermore, it establishes and manages all 130 Public Vocational Training Institutes operating in Greece and supervises the 65 private Vocational Training Institutes.

HU Leonardo da Vinci: the first phase of the Leonardo da Vinci programme in Hungary.
Tordai, Péter; Mártonfi, György
Leonardo National Agency; Tempus Public Foundation
Budapest: Tempus Public Foundation, 2002, 86 p.

Hungary joined the Leonardo da Vinci programme on 1 September, 1997. In the first application rounds, Hungarian institutions had a chance to launch 106 mobility projects and 36 pilot projects and could participate as partners in another 246 projects.

IE Benchmarking education and training for economic development in Ireland.
Expert Group on Future Skills Needs
Dublin: FORFAS, 2003, 62 p.
FORFAS, Wilton Park House, Wilton Place, IRL-Dublin 2, Tel. (353-1) 6073000, Fax (353-1) 6073030, E-mail: info@forfas.ie, *URL: http://www.forfas.ie/*
The European Commission recently adopted European benchmarks for education and training across five broad categories: early school leavers; graduates in Mathematics, Science and Technology; population having completed upper secondary education; key competencies; and lifelong learning. Nationally the Expert Group on Future Skills Needs has recognised the need for the establishment of a systematic process of benchmarking education and training in Ireland against other developed countries. By benchmarking a range of agreed indicators relating to education and training, this report aims to provide the context for the Expert Group to make recommendations in certain areas and set realistic comparative targets where feasible. Eleven key indicators were selected for examination, four long-term and seven short-term indicators, with the former assessing the 'stock' and the latter the 'flow' of educated and skilled labour force in Ireland. Sections 2-5 of the report present long-term indicators. Both national and international data on demographic trends, labour force participation rates, literacy, and educational profile of the population are presented. Sections 6-12 analyse short-term indicators relating to performance to school-leaving certificate, apprenticeships, further education, higher education, postgraduate education, adult participation and company training.

Awards and qualifications: a survey of learners and employers.
National Qualifications Authority of Ireland - NQAI
Dublin: NQAI, 2003, 36 p. + appendices
NQAI, 4th Floor, 6-9 Trinity Street, IRL-Dublin 2., Tel. (353-1) 6127080, Fax (353-1) 6127095, E-mail: info@nqai.ie,
URL: http://www.nqai.ie/

The purpose of these two surveys carried out in 2002 was to benchmark awareness and attitudes, and to inform the introduction and implementation of the National Framework of Qualifications. One in five Irish adults claims awareness of the National Framework of Qualifications. FÁS-Training and Employment Authority enjoys the highest recognition of all awards bodies in the state, followed by the Dublin Institute of Technology and the National University

of Ireland. The study surveyed learners on the perceived usefulness of the main awards/qualifications in terms of gaining employment, contributing to personal development and creating further educational/training opportunities. Employers were asked which, if any, of a number of stated awards or qualifications were particularly relevant to their industry sector and they were asked to rate their importance in their companies' recruitment procedures. In general, employers appear to rate work experience as the more important factor influencing recruitment. Although FÁS/City and Guilds/Trade qualifications are highly relevant in a number of sectors, just one in seven employers consider the awards to be essential. The greater the company size the more essential the qualification becomes, due perhaps to more formal recruitment procedures. Overall, the majority of employers feel that standards set for qualifications in Ireland reflect the needs of employers fairly well.
http://www.nqai.ie/surveyoflearners.pdf

LT Profesinis rengimas: tyrimai ir realijos Vocational Education: Research and Reality = Berufsbildung: Forschung und Realitat scientific editor Rimantas Lauzackas
[Vocational Education: Research and Reality]
Vytauto Didziojo Universitetas (Vytautas Magnus University) - VDU, Profesinio rengimo studiju centras (The Centre for Vocational Education and Research)
Adult learning for employability and citizenship. Kaunas. 2003
Profesinis rengimas: tyrimai ir realijos = Vocational Education: Research and Reality = Berufsbildung: Forschung und Realitat, 6
Kaunas: Profesinio rengimo studiju centras, 2003, non-paginated p.
ISSN 1392-6241
Vytautas Magnus University, Centre for Vocational Education and Research, Donelaicio str. 52 - 424, LT-300 Kaunas, Lithuania, Tel. (370 - 37) 323584, Fax (370 - 37) 323581, E-mail: prsc@smf.vdu.lt,
URL: http://www.vdu.lt/Social/PRSC_an.html

This publication is dedicated to the international conference 'Adult Learning for Employability and Citizenship'. The aim of this publication is to present research on adult learning in Lithuania and other European countries and to give a general overview of existing experience: the aim is to encourage politicians and society to address adult learning as an immediate factor contributing to social welfare, and to initiate measures and ensure lifelong learning.
http://www.vdu.lt/Leidiniai/ProfRengimas/2003-6en.html

LU L'économie solidaire au service du développement des communes Luxembourgeoises: un projet de société.
[An economy of solidarity which serves the development of local communities in Luxembourg: a project of society]
Ojectif plein emploi - Ope
Luxembourg: Ope, 2003, 27 p.

The idea underlying an economy of solidarity is that the cause of the current economic crisis is the transition of society from a post-industrial and tertiary era into an era of knowledge, competences and mutual services which are the response to a social demand. Within the market economy there is a movement which tries to attenuate the difficulties brought about by concentration on the market alone, and the movement is called the social economy. Its role is not to reflect on changes in thinking, but to come to the aid of groups that have been, or are at risk of being, brushed aside by the system.

PL Leonardo da Vinci, National Observatory programme, centre international
cooperation, forum programme, study visits = Leonardo da Vinci, Narodowe Obserwatorium program, centrum program wspólpraca miedzynarodowa, forum program, wizyty studyjne.
Biuro Koordynacji Ksztalcenia Kadr, Fundusz Wspólpracy - BKKK
Warsaw: Task Force for Training and Human Resources Cooperation Fund, [2002?], unpaged
Task force for training and human resources Cooperation fund 00-444 Warsaw, Górnoslaska 4a, Poland, Tel. (48-22) 6253937, Fax (48-22) 6252805, URL: www.bkkk-cofund.org.pl

This brochure provides a short overview of the current programmes and projects run by the Task Force for Training and Human Resources Cooperation Fund. The programmes particularly mentioned are the Leonardo da Vinci programme, the Cedefop study visits programme, the National Observatory - Vocational Education and

Training and the Vocational Guidance Forum. There is also a short paragraph on bilateral cooperation between Poland and Japan.

PT Future of education in Portugal: trends and opportunities - a prospective study / Roberto Carneiro.
Carneiro, Roberto
Lisbon: Ministério da Educação, [2003], various pagination
Ministério da Educação, Av. 5 de Outubro, no_ 107, P-1050 Lisboa, Tel. (351-21) 7931603, Fax (351-21) 7964119, E-mail: cirep@min-edu.pt, URL: http://www.min-edu.pt

This report first contains a chapter on the challenge - 20 years in which to overcome 20 decades of educational disadvantage. Then it deals with the vision and the reference scenario and finally with the bases for a new social contract.

SE Bringing education to life: reaching hard-to-read learners by creating innovative approaches to adult and community learning / a UK-Sweden initiative.
Foreign and Commonwealth Office; National Institute of Adult Continuing Education - NIACE
Leicester: NIACE, 2003, 62 p.
ISBN 0-90335-987-1
NIACE, Publication Sales, 19b De Montford Street, UK-LE1 7GE Leicester, Tel. (44-116) 2044216, Fax (44-116) 2854514, E-mail: orders@niace.org.uk, URL: http://www.niace.org.uk/

The British and Swedish governments set up this joint project to share knowledge and best practice on lifelong learning with the aim of increasing participation. This guide presents factors to be considered when providing and structuring learning provision for hard-to-reach learners.
http://www.fco.gov.uk/Files/KFile/Project_BringingEducationToLife.pdf

SI Social dialogue and the economic and social council of Slovenia / Miha Grah;
European Training Foundation - ETF
Action Plan for the Promotion of the Culture and Practice of Social and Civil Dialogue in the South Eastern European Region. Final Conference. Thessaloniki. 2002
[Turin]: ETF, [2002], 4 p.

Social dialogue as practiced in developed European countries has been present in Slovenia since its transition to a market economy at the end of the 1980s. It was formally introduced with the establishment of the Economic and Social Council of Slovenia (ESC) in 1994. The aim of the ESC is to discuss issues primarily concerning social agreement and wage policy.

ES Fondo Social Europeo y formación continua.
[European Social Fund and Continuing Training]
Fundación Tripartita para la Formación en el Empleo.
Madrid: Fundación Tripartita para la Formación y el Empleo, [2003], Sin paginación
Fundación Tripartita para la Formación en el Empleo, Tel. (34-91) 3009400, Fax (34-91) 7599698, URL: http://www.fundaciontripartita.org

After some comments on the functions of the Structural Funds as financial instruments for European Union interventions, the focus turns to the actions of the European Social Fund in Spain, specifically its priority lines of action; its programming and implementation; the interventions of the ESF as regards continuing training as well as the functions of the Tripartite Foundation for Training and Employment as the body responsible for administering the aids for continuing training initiatives. There is also a short list of the European and national standards applicable to continuing training initiatives and the continuing training system.
http://www.fundaciontripartita.org/publicaciones/folletos/fse.jsp

Financiación de la formación: inicial, ocupacional y continua / Esteve Oroval Planas, Teresa Torres Solé.
[Financing of training; initial, vocational and continuing]
Revista de Educación, Nº 330 (2003) , p. 171-185
Madrid: INCE, 2003
ISSN 0034-8082

This article analyses the financing sources of the three training subsystems making up the national vocational training system, as this is considered to be a key factor both for active employment policy and for the development of competitiveness in enterprises.

SE Akademisering och professionalisering: barnmorskans utbildning i förändring/evalyn Hermansson. [Academisation and professionalisation: midwifery education in transition.] Göteborgs Universitet;
Göteborg: Acta Universitatis Gothoburgensis, 2003, 207 p.
(Göteborg Studies in Educational Sciences, 200)
ISBN 91-7346-473-2; ISSN 0436-1121;
Acta Universitatis Gothoburgensis, Box 222, S-405 30 Göteborg

This thesis focuses on changes in midwifery education as a result of different social and educational policy reforms. The aim of the thesis is to analyse how demands of professional relevance and a scientific foundation of midwifery education have been affected by changes in the education system and the changes formulated as competence requirements for the profession, and to identify the conditions that have influenced the study programme.

UK Basic skills in the workplace: a research review / John Payne.
London: Learning and Skills Development Agency, 2003, 79 p.
ISBN 1853388319;

This report identifies recent English-language research on basic skills in the workplace. It attempts to record and analyse what has been written about the subject and to provide an overview of the field. It seeks to provide information that will: inform policy regarding the expansion of workplace basic skills as part of the government's basic skills strategy; inform practice by established and new providers of workplace basic skills; inform decisions about future research priorities.

Credit systems for learning and skills: current developments / Tony Tait.
Leicester: LSDA, 2003, 18 p.
ISBN 1-85338-859-9;
Learning and Skills Development Agency, 3 Citadel Place, Tinworth Street, UK-London SE11 5EF, Tel. (44-20) 7962 1066, *URL: http://www.lsda.ac.uk*

This publication is designed to: reflect on credit developments for learning and skills over the past 10 years; review current developments, especially in England and as they relate to the learning and skills sector; consider ways in which credit could and does support a range of priorities in terms of government policy; set out LSDA's views and current approach to credit; set out key recommendations for taking forward credit developments in the future.
http://www.lsda.org.uk/pubs/dbaseout/download.asp?code=1466

Developing new vocational pathways. Office for Standards in Education - OFSTED;
Online: OFSTED, 2003, 15 p.
OFSTED, Alexandra House, 33 Kingsway, UK-London WC2B 6SE, Tel. (44-20) 74216800, *URL: http://www.ofsted.gov.uk*

In September 2002, eight new GCSE subjects were introduced as part of a programme to develop further vocational provision. The subjects are: art and design, business, engineering, health and social care, information and communication technology (ICT), manufacturing, science, and leisure and tourism. During the autumn and spring terms 2002/03, Ofsted made 93 visits to schools involved in introducing and providing the new courses. Based on this relatively small sample, this interim report summarises the main findings and key issues arising by June 2003.
http://www.ofsted.gov.uk/publications/docs/3374.pdf

ReferNet – European network of reference and expertise

Cedefop

European Centre for the Development of Vocational Training
P.O.Box 22427
GR-55102 Thessaloniki
Tel.(30)23 10 49 01 11 General
Tel.(30)23 10 49 00 79 Secretariat
Fax (30)23 10 49 00 43 Secretariat
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http://www.cedefop.eu.int
http://www.trainingvillage.gr

BIBB

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Tel. (31-73) 68 00 619
Fax (31-73) 61 23 425
http://www.cinop.nl/

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Vlaamse Dienst voor Arbeidsbemiddeling en Beroepsopleiding
Intercommunautair documentatiecentrum voor beroepsopleiding
Keizerlaan 11
B-1000 Brussels
Tel. (32-2) 50 61 321
R. Van Weydeveldt
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Reinald Van Weydeveldt, Documentation
E-mail:rvweydev@vdab.be
Web address:http://www.vdab.be

OEEK

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Ethnikis Antistasis 41 and Karamanoglou
GR-14234 Athens
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E-mail: tm.spoudon@oeek.gr
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Fax (30-21) 02 71 97 66
http://www.forthnet.gr/oeek/

FÁS

Training and Employment Authority
P.O. Box 456, 27-33 Upper Baggot Street
IRL-Dublin 4 Dublin
Jean Wrigley, Consultant Librarian
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Tel. (353-1) 60 70 538
Fax (353-1) 60 70 634
http://www.fas.ie/

abf-Austria

IBW
Institut für Bildungsforschung der Wirtschaft
Rainergasse 38
A-1050 Vienna
Prof. Thomas Mayr, Director
E-mail: mayr@ibw.at
Tel. (43-1) 54 51 67 10
http://www.ibw.at/

CIRIUS

Center for Information og Rådgivning om International Uddannelses- og Samarbejdsaktiviteter
Fiolstræde 44
DK-1171 København K
Svend-Erik Povelsen, Senior Adviser
E-mail: sep@CiriusMail.dk
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Servicio Público de Empleo Estatal
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INOFOR

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Tel. (358-9) 77 47 71 24
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http://www.oph.fi/

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http://www.skolverket.se/

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Qualifications and Curriculum Authority
83 Piccadilly
UK-W1J 8QA London
Tom Leney, UK ReferNet Coordinator
E-mail: leneyt@qca.org.uk
Tel. (44-20) 75 09 53 92
Fax (44-20) 75 09 69 77
http://www.qca.org.uk/

MENNT

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Web address:
http://www.teknologisk.no/

NCVER

National Centre for Vocational Education Research Ltd.
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AU-SA 5000 Station Arcade
Dr Tom Karmel, Managing Director
E-mail: exec@ncver.edu.au
Tel. (61-8) 82 30 84 00
Fax (61-8) 82 12 34 36
http://www.ncver.edu.au/

EVTA

European Vocational Training Association
Rue de la Loi, 93-97
B-1040 Brussels
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Tel. (32-2) 64 45 891
Fax (32-2) 64 07 139
http://www.evta.net/

EFVET

European Forum of Technical and Vocational Education and Training
Rue de la Concorde, 60
B-1050 Brussels
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E-mail: h.vanaalst@kpcgroep.nl
Tel. (32-2) 51 10 740
Fax (32-2) 51 10 756
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European SchoolNet

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European Commission

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http://europa.eu.int/comm/dgs/education_culture/index_en.htm

Eurydice

Le reseau d'information sur l'éducation en Europe
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International Centre for Technical and Vocational Education and Training
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Fax (49-228) 24 33 777
http://www.unevoc.de/

ILO

Centre international de formation de l'OIT
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Fax (39-011) 69 36 535
http://www.itcilo.org/

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Overseas Vocational Training Association
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JP-261-0021 Chiba-shi,
Nobuhiro Uehara, Managing Director
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http://www.ovta.or.jp/

KRIVET

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ILO/BIT

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Dr Jane Barney, Documentalist
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Department for Education and Skills
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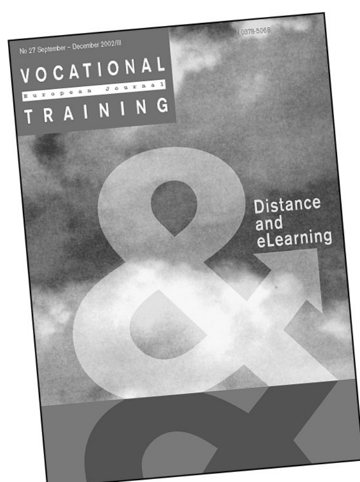

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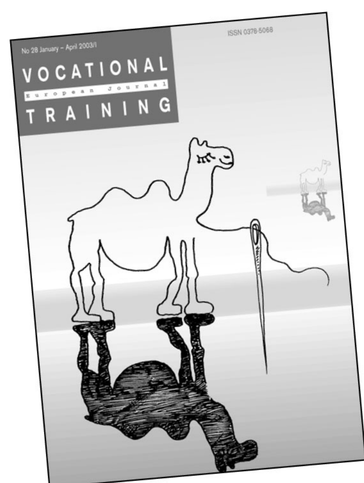

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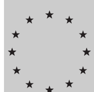

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