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Modernising education and training: a vital contribution to prosperity and social cohesion in Europe

Draft 2006 joint progress report of the Council and the Commission on the implementation of the "Education & Training 2010 work programme"

{COM(2005) 549 final

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1. INTRODUCTION

"Europe must renew the basis of its competitiveness, increase its growth potential and its productivity and strengthen social cohesion, placing the main emphasis on knowledge, innovation and the optimisation of human capital." (European Council conclusions, March 2005)

As underlined by the Council and the Commission in their 2004 Joint Interim Report on the implementation of the Education and Training 2010 work programme[1], urgent reforms of Europe's education and training systems are needed in the medium-and long-term, in order to help to ensure that all citizens, the economy, and European societies in general, are able to face up to the challenges of the 21st century.

The mid-term review of the Lisbon strategy in 2005 has reinforced this message: while the broad mission of education and training systems is to serve society as a whole, they are of particular importance in helping to guarantee a return to sustainable growth and creating more and better jobs.

This Commission Staff Working Paper, which accompanies the Communication "Modernising education and training: a vital contribution to prosperity and social cohesion in Europe" (draft 2006 joint Council/Commission report), charts progress in implementing the Education and Training work programme since 2004, and thus provides an update of the 2003 Commission Staff Working Paper covering the first two years of implementation of the work programme[2]. The 2004 Interim Report stated that progress would be followed up every two years on the basis of information to be provided from Member States on developments at national level.

Each of the 32 countries participating in the work programme submitted a national report, structured on the basis of a guidance note from the Commission, which requested concise information relating to the major priority areas of the 2004 Interim Report, i.e. the relationship between national policies and the Lisbon agenda; investing more and more efficiently in education and training; implementing lifelong learning strategies; reforms of higher education and vocational education and training (VET); and developing the European dimension of education and training. Countries were asked to provide, in 20-30 pages, key information concerning strategies or policies either already in place or in the planning stage, specifying progress made and main obstacles encountered, along with measurable changes and trends.

A cross-country analysis of the national reports, according to these priority areas, is presented in sections 2-7 below[3]. Section 2 examines the growing relationship between the Lisbon

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[1]   'Education and Training 2010: The success of the Lisbon Strategy hinges on urgent reforms', 3 March 2004 (doc. 6905/04).
      http://europa.eu.int/comm/education/policies/2010/doc/jir_council_final.pdf.

[2]   Commission Staff Working Paper: 'Implementation of the Education and Training 2010 work programme'. Supporting document for the draft joint interim report on the implementation of the detailed work programme on the follow-up of the objectives of education and training systems in Europe (COM (2003) 685 final).

[3]   The cross-country analysis was prepared with the support of external consultants from the Qualifications and Curriculum Authority (QCA), London, UK, and the European Institute for Education and Social Policy (EIESP), Paris, France.

strategy and national education and training policies, including the development of in-country mechanisms to coordinate the implementation of the Education and Training 2010 work programme, and the impact of international comparative data on shaping national initiatives. Section 3 gives an overview of Member States' priorities for reform and investment, as well as of trends in levels of public investment, and measures for increasing investment by individuals, households and employers. This section also takes stock of countries' efforts to increase the efficiency of investments, and to monitor the effectiveness of their education and training systems. Section 4 assesses Member States' progress in adopting and implementing national strategies for lifelong learning, in view of the deadline of 2006 fixed in the 2004 Joint Interim Report. The coherence and comprehensiveness of strategies is discussed, and national progress in relation to key lifelong learning objectives is reported, including against the EU benchmarks for education and training adopted by the Council in 2003. Finally, an overview of the challenges and obstacles to creating a culture of lifelong learning in Europe is presented. Section 5 addresses higher education reform, both in relation to the Bologna process, including structural reform, and the Education and Training 2010 work programme, including the key issues of governance, attractiveness and innovation. Section 6 looks closely at Member States' efforts to improve the quality and attractiveness of VET, including through the implementation of the tools developed under the Copenhagen process, and also through policies to increase participation in VET, to address the needs of low-skilled groups and older workers, to improve links with the labour market and to enhance the professional development of vocational teachers and trainers. The final part of the cross-country analysis concerns the European dimension of education and training, both in terms of mobility, where policies and measure to promote mobility of students, pupils and teachers are reported, and in terms of the European dimension in national curricula at primary and secondary level, and in teacher education.

Section 8 reports on the implementation of the Education and Training 2010 work programme at European level, noting developments in the broader framework of the mid-term review of the Lisbon strategy, and the transition from the first to the second phase of the implementation of the work programme. New developments such as the launching of peer learning activities, and improvements in the governance of the work programme, including a new Education and Training 2010 Coordination Group, are examined, as well as the state of play in relation to the priority areas of the work programme. As with the cross-country analysis, developments are reported in the perspective of an integrated approach, covering lifelong learning policies, the outcomes of the 'objectives' working groups, higher education in the Lisbon strategy and in the Bologna process, and finally the implementation of the Copenhagen process.

It is important to stress that the picture that emerges from the cross-country analysis (sections 2-7) does not constitute a comprehensive overview of the huge diversity and complexity of national situations. Rather, it aims to provide a synthetic account of the main priorities, concerns, areas of progress and results still to be achieved, expressed by the national authorities themselves.

Nonetheless, where it has been appropriate and useful to do so, the information in the national reports has been supplemented with information and data from other official sources, notably earlier contributions from the national level to the Education and Training 2010 work programme (e.g. the reports provided in 2003 on the follow-up of the 2002 Council Resolution on lifelong learning[4]; the reports provided in the context of the 'Maastricht' study

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[4]   Council Resolution of 27.06.2002 on lifelong learning, OJ C 163 of 9 July 2002.

on vocational education and training[5]). The results of the Bologna process on higher education have also been taken into account[6]. In addition, the Commission's 2005 progress report on indicators and benchmarks for Education and Training 2010 constitutes a key input as far as the measuring of progress in key areas of the work programme is concerned[7].

Most countries used established coordinating structures for the purposes of the exercise, or set up such structures, enabling them to draw in the contributions of other relevant ministries (notably employment), regional authorities (especially where responsibilities for education and training are devolved) and stakeholders (notably the social partners, and in some cases parents, teachers and students organisations).

2.   THE DEVELOPMENT OF NATIONAL POLICIES AND THE LISBON AGENDA

2.1.   The Lisbon strategy in national policies

Since the adoption of the Education and Training 2010 work programme, the Lisbon process for education and training at the EU level has developed rapidly, involving cooperation on the part of European governments and other stakeholders in the context of the open method of coordination (OMC). Over this time, Education and Training 2010, including the actions for higher education and for vocational education and training (the Copenhagen process), has become a clearer part of the national policy landscape, even though in most Member States participation in the linked work still remains to be extended to stakeholders beyond limited groups of policy makers.

Most of the 32 countries provide evidence in the 2005 national reports[8] that the Lisbon strategy is now a factor in their education and training policies. In this respect, and using the national reports as the source of evidence, the countries can be grouped into the following three categories:

1.   Countries in which many key aspects of the Lisbon strategy now form an integral part of the frame of reference for national policy development. This includes **Austria, Belgium** (**-nl** and **–fr**)**, Bulgaria, Croatia, Cyprus,** the **Czech Republic, Estonia, Finland, France, Germany, Hungary, Ireland, Italy, Latvia, Malta, Greece, Lithuania,** the **Netherlands, Poland, Portugal, Slovakia, Slovenia, Romania, Spain** and the **UK.** While some countries are actively implementing policies that relate closely to Lisbon, others, including candidate countries, are still mainly at the planning or preparatory stage.

2.   Countries where there is synergy between national priorities and the Lisbon strategy, although it cannot be said that the latter has shaped the former. Countries in this category are **Denmark, Liechtenstein, Luxembourg, Sweden** and **Turkey**. In the case of **Denmark** and **Sweden**, for example, the national reports describe the Lisbon

[5]   Maastricht study, 'Achieving the Lisbon Goal: The contribution of VET', 2004.
         http://www.europa.eu.int/comm/education/policies/2010/studies/maastrichtexe_en.pdf.
[6]   All the documentation to date can be found at the Bologna-Bergen website.
         http://www.bologna-bergen2005.no.
[7]   Commission Staff Working Paper of March 2005, "Progress towards the Lisbon objectives in education and training" SEC (2005) 419.
[8]   Will be available on the Education and Training 2010 web site from November 2005.
         http://www.europa.eu.int/comm/education/policies/2010/et_2010_en.html

programme as implicit not explicit, as the country develops towards a knowledge-based economy, and has met most of the five reference levels of average performance, or benchmarks[9].

3.   Countries where there is some link with the Lisbon strategy, but this remains 'at arms length'. This comprises **Iceland** ('at arms length') and **Norway** ('indirectly').

Different aspects of the Lisbon goals are integrated in the European Youth Pact, which calls for actions for young people in employment, social inclusion, education and training and family-work balance, to be developed in a consistent fashion. The education and training strand of the Pact is built on elements of Education and Training 2010, with particular reference to the Lisbon process. The Pact does not feature explicitly in the national reports, given the timing of its adoption by the European Council (March 2005). Nonetheless, developments underway in the Member States can be traced throughout this report[10].

2.2.   Evidence of a growing relationship between the Education and Training 2010 work programme and national developments

If Europe is to achieve the economic, social and environmental goals agreed at Lisbon, then action geared to meeting medium-and long-term objectives is needed. This will necessitate setting the conditions for improved investment in knowledge and innovation and accelerating and delivering the reforms already agreed. For education and training, a closer correspondence between the national goals and programmes and the Lisbon objectives and actions was called for by the 2004 Joint Education Council and Commission Report on 'Education and Training 2010', with the development of coherent and comprehensive lifelong learning strategies defined as the mechanism that could bring a clear focus on medium-and long-term developments. The 2005 national reports indicate, compared to the situation as assessed in 2004, a dynamic and strengthening relationship between the European and national levels of policy making and work programmes.

Most of the countries, certainly most of the EU Member States, have to a considerable extent adopted a common set of concepts and tools to describe how their policies are developing. In other words, a common language now exists to describe to one another and to the European Commission what partners are aiming to achieve in their implementation of the Education and Training 2010 work programme. The way in which the writers have reported is now closely aligned to:

-       The objectives and priorities of Education and Training 2010. Governments have not only accepted the importance of the common objectives and priorities, but also

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9   Council conclusions of 5 May 2003 on reference levels of European average performance in education and training (Benchmarks) (2003/C 134/02).

10   The action lines of the education and training strand of the Youth Pact are: 1) Ensuring that knowledge matches the needs of a knowledge-based economy and to this end encouraging the development of a common set of core skills, in this context, concentrating primarily on the problems of drop-outs from the school system (see section 4.3.2); 2) Expanding the scope for students to undertake a period of study in another Member State (see section 5.3); 3) Encouraging mobility of young people by removing obstacles for trainees, volunteers and workers and their families; for researchers, stepping up ongoing initiatives under the Marie Curie programme (see section 7.1); and 4) Developing, between Member States, closer cooperation on transparency and comparability of occupational qualifications and recognition of non-formal and informal education (see sections 4.3.3, 4.3.4, 6.1). See also section 8.4.

gained experience of the collaborative work in the first phase of the Education and Training 2010 work programme.

- The five reference levels of European average performance in education and training (benchmarks). The European Commission now reports progress annually, on a country-by-country basis. In particular, many countries are now strongly aware of how they fare comparatively.

- The specific actions generated through the Bologna process (such as the European alignment of the cycles of higher education) and the Copenhagen process (such as the recognition of informal and non-formal learning, and targeting specific groups).

The five reference levels of average European performance, or benchmarks[11], are one of the tools for monitoring the implementation of the Education and Training 2010 work programme. While they do not define national targets, national actions are contributing to their achievement. Nonetheless, many countries report that they are using – to varying degrees – the EU benchmarks in the definition of specific national targets for education and training (**AT**, **BE** (**-fr** and **–nl**), **CY**, **CZ**, **DK**, **EE**, **ES, FI**, **FR**, **HU**, **IE**, **LT**, **LV, NL**, **MT, PO, PT, RO, SI, SK** and **TR**[12]). For example, **Austria** has established an action plan based on EU benchmarks, but with higher targets, **Slovenia** and **Spain** have translated the EU benchmarks into national targets and the **Netherlands**' education benchmarks action plan links national developments to the EU benchmarks. **Sweden** reports a close follow up of the Lisbon objectives in the field of education and training and it was the first country to launch a national status report on the implementation of the Education and Training 2010 work programme.

Since the situation as assessed in the 2004 Interim Report, the content of most Member States' national reports, and in some cases associated countries, has moved on from making quite general statements to include specific references to progressing or adapting policies, goals and objectives that have been agreed at the European level. Furthermore, these are to a greater extent expressed in terms of specific targets and outcomes. The relationship between the Education and Training 2010 work programme and the ways in which countries report on the development of national priorities and programmes has thus become closer in the short period between 2003 and 2005.

2.3. **In-country mechanisms to coordinate national policies with Education and Training 2010**

Most of the reports make reference to arrangements for coordination to connect the Education and Training 2010 work programme to national policy processes. We can largely distinguish between four approaches that countries report[13]:

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[11]   Op. cit. See also section 4.3 and section 5.9.

[12]   AT-Austria; BE-nl-Belgium (Flemish community); BE-fr-Belgium (French community); BG-Bulgaria; CY-Cyprus; CZ-Czech Republic; DE-Germany; DK-Denmark; EE-Estonia; EL-Greece; ES-Spain; FI-Finland; FR-France; HR-Croatia; HU-Hungary; IE-Ireland; IS-Iceland; IT-Italy; LI-Liechtenstein; LT-Lithuania; LU-Luxemburg; LV-Latvia; MT-Malta; NL-Netherlands; NO-Norway; PL-Poland; PT-Portugal; RO-Romania; SE-Sweden; SI-Slovenia; SK-Slovakia; TK-Turkey; UK-United Kingdom.

[13]   It is important to stress that this categorisation does not constitute a comprehensive overview of national coordination mechanisms. Certain countries could thus feature under more than one category. However,

- <u>Ad hoc consultative arrangements</u>, (e.g. **EL, HR**, **IS, LI, NO, RO** and **TK**).

- <u>Education ministries hold regular seminars or conferences</u>, with reporting or monitoring processes established (e.g. **BG**, **IT and LU**) and across authorities in federated States (e.g. **DE**). Often these involve social partners and other stakeholders.

- <u>Inter-ministerial standing arrangements</u> involving in particular the education and labour ministries and usually social partners, with a reporting process (e.g. **AT, BE(-fr** and **–nl**), **CY, DK, EE, EL, ES, FI, FR, IE, LT, MT, NL, PT, SE,** and **SI**). **Latvia** describes how the range of economic and employment policies are taken into full account, and a range of authorities and stakeholders involved. **Poland** has arrangements that bring together education and training, employment, and the regional and sectoral dimensions of planning. The **UK** also has joint international arrangements between the education and employment ministries, which involve social partners, as well as the devolved administrations, each of which have their own territorial responsibilities for lifelong learning.

- <u>Coordination arrangements that bring under a single strategic umbrella all aspects of the Lisbon programme</u>, by linking most of the economic, employment, research, innovation, environmental, inclusion and education and training aspects (e.g. **CZ, HU** and **SK**). **Slovakia** has a competitiveness strategy for 2010, linking education, training, employment, science, research, innovation, entrepreneurialism and the information society.

According to the national reports, cooperation also takes place in some cases across national borders in geo-regional clusters. The clearest example is the well-established Nordic Council of Ministers (cited as an important impetus by **the Nordic countries**). This is an expanding geo-regional, collaborative network that sits between the national and European levels that could be taken up in other parts of Europe, just as regional and sectoral collaboration already provides another trans-national feature in many European countries.

2.4.   The impact of international comparative data on shaping national initiatives

Beyond the influence of the open method of coordination and the Education and Training 2010 work programme, many countries acknowledge the influence of OECD surveys. PISA in particular is cited as having a strong impact on policies to raise standards and initiate reform in several countries. **Denmark, Germany, Hungary, Liechtenstein, Norway**, **Slovakia** and **Austria** illustrate this most clearly. In **Germany** and **Norway** PISA is reported as having, in effect, the strength of a driver. In **Austria**, the PISA 2000 results are mentioned as contributing to the policy decision to streamline the school curriculum and split it into core and additional areas, while the TIMSS results led to the innovation in maths, science and technology teaching project. This has had a clear influence on concentrating policy reforms aimed to improve basic competences in compulsory schooling. **Poland, Turkey** and other countries mention the helpful impact on policy formation of OECD country reviews and other reports.

In terms of adult learning, the international surveys are cited infrequently as an influence on policy. Exceptions include **Ireland**, which records that the International Adult Literacy

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the categorisation aims to provide a synthetic account of the main arrangements, expressed by the national authorities.

Survey (IALS)[14] has had a considerable impact on national policies for adult learning and continuing vocational training, **Luxembourg**, whose report indicates why the Labour Force Survey data does not give an accurate picture for the country, and **Denmark** who has implemented the recommendations from the IALS study. **Ireland** also mentions the impact of the OECD/European Commission research and publications on guidance. **Lithuania** specifically mentions the impact of the second Information Technology Survey.

2.5. Conclusions

In 2005, the Education and Training 2010 work programme (including the actions for higher education and for VET) has become a much clearer part of the national policy landscapes. Most countries provide evidence that the Lisbon strategy is a significant factor taken into consideration as they develop their education and training policies, and most indicate that many key aspects of the Lisbon strategy form part of the frame of reference for national policy development. In 2005, the national reports are now closely aligned to the objectives and priorities of Education and Training 2010, including the EU benchmarks and the specific actions generated through the Bologna and Copenhagen process. Many countries are now strongly aware of how they fare comparatively, particularly in terms of the EU benchmarks. Many of the countries have established or are establishing specific national targets in relation to the five benchmarks. The OECD PISA study is a strong international frame of reference; this is much less the case with surveys of adult learning, such as IALS which is based on relatively old data. As a consequence, OECD is in the process of developing a new survey on adult competencies. The Commission is also defining EU data needs, which is a first step in an increased cooperation with international organisations active in this field in accordance with the Council Conclusion on New Indicators of 24 May 2005.

Most countries are developing coordination arrangements to connect the Education and Training 2010 work programme to national policy processes. In some cases this is *ad hoc* under the leadership of the education ministry, although increasingly ministries have now developed (or are developing) more formal processes, which may involve the social partners and other stakeholders. A large group of countries has developed a wider process for involving a range of ministries that have a stake in education, training and lifelong learning. Only a few link all stakeholders to address all the different facets and aims of the Lisbon strategy, to integrate lifelong learning with the economic, employment, research, innovation, environmental, inclusion and cohesiveness aspects of the Lisbon goal. This, and involving wider publics and more actors, would be a strong step forward, since education and training policy tends still to be rather compartmentalised.

3. INVESTING MORE AND MORE EFFICIENTLY: FOCUSSING REFORM ON THE KEY AREAS

3.1. Priorities for reform and investment

Countries vary considerably in how they report on their priorities for investment in education and training. Some discuss priorities in very general terms (e.g. increasing participation and access or quality). Some are quite specific about the areas (levels/phases/policies) where extra funding will go. Other countries mention many areas but largely in aspirational terms. On the

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[14] The International Adult Literacy Survey (IALS) was an interview-based survey administered by OECD and Statistics Canada and conducted between 1994 and 1998 in three rounds.

whole the reports do not give a precise picture of where new financial investments are going and how large these investments are.

The areas most frequently mentioned as reform priorities are in general terms consistent with the Education and Training 2010 objectives but not identical in the way they are described and the emphases given. The most frequently emphasised priorities in the reports are[15]:

- Developing skills for the knowledge economy

- Improving training and development for teachers and trainers;

- Improving standards and quality in compulsory and post-compulsory schooling

- Improving quality assurance systems;

- Ensuring access to ICT for all; and

- Expanding higher education enrolment/ Implementing Bologna/ internationalising higher education.

According to the national reports, all countries are prioritising the development of skills for a knowledge-based economy and for economic competitiveness. Equally, virtually all countries indicate that social inclusion – in terms of increasing equal opportunities – is a defining component of their lifelong learning strategy or policy. There is, in this context, quite widespread discussion of increasing access for certain groups (such as immigrants, ethnic minorities). Enhancing access to learning is mentioned more in relation to young people and formal education than to adult employees and work-based training, however. Investment in pre-school and learning opportunities for older citizens are also less emphasised. Initiatives to enhance social cohesion in the broader sense, for instance through promoting active citizenship and through equalising educational outcomes, are also less frequently mentioned as priorities, most probably because the guidelines for this reporting exercise did not specifically request information in relation to this.

The general priorities specified contain much reference to both economic and social factors. Several countries (e.g. **AT**, **BE** (**-fr** and **–nl**), **DK, FI** and **SE**) describe a balance in their policies between economic and social objectives. High performing countries such as **Finland** and **Sweden** also point up how difficult it is to reach some target groups successfully. The approach taken in the **UK** report, while making a priority of the social inclusion agenda, implies that if the economic (productivity and growth) and employment agenda (high employment levels, skills, employability) is successful, the social agenda can be addressed more readily in consequence. **Italy**'s prioritisation of policies illustrates a similar logic, while **Estonia** frames its lifelong learning strategy as part of competitiveness.

In terms of barriers to progress, financial constraints on spending on education and training are identified as a restraint on achieving a balance between competing policy priorities. A wide range of countries (including **BE-nl, BG, CY, CZ, FR, LV, MT, PL, PT** and **RO**) emphasise economic constraints that have a limiting impact on achieving the whole range of policies.

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[15] The categories deployed here are derived from the reforms mentioned in the national reports, which have been aggregated into generic categories.

It is notable that secondary and higher education are given more attention in the reports than other levels of education such as pre-school and primary education and adult continuing education and training. Continuing vocational training (CVT) seems to be a priority mostly in countries with higher levels of spending on education generally (e.g. **AT**, **DK, FI**, **SE**, and the **UK**). There is a clear priority accorded to higher education in the reports from new Member States and candidate countries. The European Training Foundation (ETF) has underlined[16] the need also to prioritise secondary and initial vocational education and training (IVET), given the importance of intermediate level skills in these countries. As is the case for all countries, there is a danger of trading one policy area off against other policy areas, thus affecting the coherence of lifelong learning strategies.

3.2. Increasing levels of investment

The national reports, in general, do not provide detailed information on how patterns of investment have been adapted in order to confront priority reforms. Most data provided relates to formal education and there are very few data on aggregate public and private spending on education and training.

The Commission progress report on indicators and benchmarks 2005[17] indicates that although public expenditure on education and training as a percentage of GDP fell slightly[18]between 1995-2000, there has been an upward trend since 2000, at EU level and in most Member States. The data show strong differences in spending levels between countries, with a few spending over 7.5 % of GDP and some, even though their spending is increasing, spending less than four %.

In the national reports, a number of countries record recent increases in public expenditure on education and training as a proportion of GDP (e.g. **BE-fl, CY**, **CZ, EE, EL, ES, NL, SE, SK** and the **UK**) while others mention targets for future increases[19]. A number of reports mention specific areas where levels of public funding are increasing. **Austria** notes a 25 percent increase in school spending, 1995-2005; **Bulgaria** notes a fourfold increase in government spending on employment training from 2002-4; **Cyprus** notes planned increases in spending for lengthening the school day, teacher training, improving school buildings, and ICT; the **Czech Republic** notes planned increases in spending for higher education; **Denmark** mentions plans for increases for ICT, VET and adult education; **Malta** notes substantial increases in government spending notably for higher education and vocational education and training, and **Iceland** for curriculum reform and university expansion.

Several new Member States mention that levels of funding are inadequate to reach their policy targets in general (e.g. **CZ, HU** and **SK**) or in relation to particular areas, such as **Romania** in relation to teacher training targets. The **Polish** report notes the serious under-investment in capital expenditure and the **Croatia** report says the country needs another 1%

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[16]   European Training Foundation (ETF) Report, 'VET Financing in the New Member States and Candidate Countries', 2005.

[17]   See the Statistical annex of the Communication 'Modernising education and training: a vital contribution to prosperity and social cohesion in Europe'.

[18]   However, in real terms public expenditure on education and training increased on average by 1.9% per year from 1995 to 2000 and even by 3.8% since 2000.

[19]   The ETF Report (2005 ibid) found that public spending on education as a proportion of GDP since 1995 decreased slightly Estonia and the Czech Republic and markedly in Latvia and Slovakia. It increased in Hungary, Poland, Cyprus, Lithuania and Turkey. Public expenditure relative to GDP in ten new Member States was similar to that in the EU 15, but Candidate Countries spent considerably less.

of GDP to fund its reform programme and that it has inadequate resources to co-fund Socrates and Leonardo da Vinci initiatives.

There is a widespread recognition that reaching the targets (national and Lisbon) requires additional investment. Most attention in the reports is devoted to public expenditure, although many countries refer to the need to increase investment from other sources. Many reports discuss the importance of EU funding (European Social Fund (ESF) and PHARE etc.) or funding from other sources such as the European Investment Bank or the World Bank. However, the question of how to encourage more private investment in education and training internally is not treated very systematically in the reports. Notably, the reports indicate that measures to increase individual and household investment in education and training are developing more successfully than those aimed at increasing employer investment. There is little evidence of an overall increase of employer investment in training.

Countries generally perceive the need to increase significantly investment in human capital in line with the Lisbon goal. They also generally perceive that public expenditure cannot meet all the future spending requirements, and that private investments also need to be made. The State is expected to fund compulsory schooling, and the majority of initial post-compulsory education and training. In some countries the State also takes responsibility for funding second-chance education for adults who have low levels of qualification and lack personal funds to acquire basic skills and secondary level qualifications. However, countries increasingly expect individuals and firms to contribute to the costs of adult continuing training and higher education where there are high private rates of return. Little evidence, though, is provided on levels of private investment, and particularly company investment, which are thought to vary significantly between countries.[20]

3.3. Measures to increase individual/household investment

3.3.1. Cost Sharing

Increasing private individual investment through cost-sharing policies is the most commonly cited means of increasing investment in the reports. Such policies normally involve the charging or raising of tuition fees, in many countries accompanied by the provision of government loans or grants for those from families less able to pay. Tuition fees are most commonly mentioned in relation to higher education. A number of countries have or are about to introduce fees in higher education (e.g. **AT** since 2001, **DK** (for foreign students), **ES, RO, SK, TR** and the **UK**) and some are currently deliberating on the issue (e.g. **MT, PO, RO,** and **SE**-for students from outside Europe). Some countries, including the **Czech Republic,** have discussed and rejected such policies. A few countries have recently introduced, or are about to introduce, tuition fees for adult education (**DK** and the **UK**). Tuition fees for private or independent schools also represent a form of cost sharing when these schools are part subsidised by government (e.g. **FI**). Countries vary considerably in the prevalence of private schools and the degrees of government subsidy for them, but a number of countries, including **Norway** and **Slovakia**, refer to the increasing prevalence of private schools and policies adopted to make the foundation of new private schools easier.

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[20]   Commission Staff Working Paper, Progress towards the Lisbon objectives in education and Training: 2005 Report, Brussels, 22.3.05, henceforth referred to as 'Commission Progress Report on indicators and benchmarks 2005'.

The provision of loans to students is mentioned in a number of reports. This includes **Iceland** (fully repayable and income contingent)**, Norway** (for foreign students and study at private universities), **Estonia**, **Slovakia** (under legislation), **Finland, Latvia** (for study abroad), **Slovenia, Sweden, Turkey** and the **UK.** Some countries make these convertible for those graduating within the time limit into tax-deductible loans (**Finland**) or grants (**the Netherlands**). The provision of grants for higher education students are also mentioned in a number of reports, specifically **Austria**-means tested; **Germany** – stressing their portability for studies abroad; **Cyprus** and **Estonia** – for study abroad; **Finland, Greece, Malta**-under consideration; **Slovenia** and **Sweden**. It is notable that most countries introducing fees for higher education do accompany these with some kind of loan or grant system to support the less affluent students. Grants for post-school study are a notable feature of the Nordic countries (including in some cases grants for high school study) as well as being characteristic of a number of new Member States.

3.3.2. *Tax incentives*

Many countries mention the use of tax incentives as means to encourage individual/household investment in education and training (e.g. **CY, FI, HU, LT, MT, PT, SI** and **TR**). Tax incentives can take a number of different forms and can be targeted to different groups of persons in respect of different categories of personal education and training expenditure[21].

3.3.3. *Vouchers*

Tax incentives which encourage choice amongst users of education and training and which can be used either in the private sector or in public institutions have also been introduced in a number of countries, including in the form of the Individual Learning Accounts where government co-funds with individuals (e.g. **Scotland** and **Wales** in the **UK**). **Slovakia** has launched a system issuing vouchers for primary school pupils participating in extra curricular activities. The Commission's analysis of the 2003 national Lifelong Leaning Reports also found evidence of Lifelong Learning Accounts in **Austria, Belgium** and the **Netherlands**[22].

The reports do not give data on how much additional investment from individuals has been raised from the above measures. On the other hand, one may assume that substantial additional investments have been forthcoming in countries introducing student tuition fees. The reports frequently note that participation in higher education has risen and, where the introduction of fees applies, has not been adversely affected.

3.4. Measures to increase employer investment

3.4.1. *Tax incentives*

Most frequently mentioned policies to encourage employer investment in training involve forms of tax incentives for employer training (e.g. **AT, EE, ES, FI, FR, NO** and **RO**)[23].

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[21] The ETF Report 'VET Financing in the New Member States and Candidate Countries' (2005) noted widespread use of tax subsidies to employees incurring personal training costs in the new Member States and candidate countries.

[22] EC, 'Implementing Lifelong Learning Strategies in Europe: Progress Report on the follow-Up to the 2002 Council Resolution on Lifelong Learning'.

[23] The ETF Report 'VET Financing in the New Member States and Candidate Countries, 2005 identifies tax incentives for training for employers in Bulgaria, Estonia, Cyprus, Hungary, Malta, Poland and the Czech Republic.

Levies, typically in the form of a company payroll tax, which is placed in a collective fund to be distributed to employers who train, is also relatively common. Statutory Levies, where government organises re-distribution of funds, are common in Southern European States (e.g. **CY, EL** and **ES**) and also in new Member States and candidate countries[24]. Sectoral levies, channelled into mutual funds organised by the social partners, tend to be more common in northern Europe (e.g. **DK, FR** and **NL**) but have made little headway in the new Member States where the organisation of social partnership tends to be weaker. Several countries report current discussions about the introduction of levies (e.g. **IT** and **PL**).

3.4.2. Co-financing

Co-financing by government is another means for encouraging employer investment in training. The Governments in **Bulgaria** and **Cyprus** are co-funding workplace training with employers and in **Belgium-nl** since 2001 the Government has paid up to half the cost of work-based training, assessment and guidance through *'Training and Guidance Cheques'*. The Government co-funds the apprenticeship system in **Denmark** and in the **UK**. In **France**, the government grants specific tax exemptions to employers, which includes training provisions in job contracts with young people under 26 years of age and adults over 45 years of age. Arrangements for employers to contribute to the costs of educational institutions (as with equipment for vocational schools in **France** or the sponsoring of university Chairs in **Iceland** and **Finland**) may be considered as another form of co-financing.

Private Public Partnerships (PPPs) represent a particular form of co-financing generally involving educational institutions sub-contracting private suppliers to manage and maintain buildings or to provide other non-teaching educational services[25]. This type of arrangement would seem to be increasingly prevalent. **Poland** has launched an act on PPPs in 2005. **Ireland** is using PPPs for school building management and maintenance, as is the **UK**. The reports from **Belgium-fr, Estonia** and **Portugal** mention PPP arrangements in place for VET and higher education (**PT** also mentions PPPs for pre-school education and adult education and training), and the reports for **Hungary** and **Spain** note ongoing discussions for the same. The **Croatia** report also emphasises the importance of PPPs. There are many examples of PPPs around the provision of ICT services. The 2003 Lifelong Learning Reports gave little evidence of a growth in PPPs[26], so the evidence here suggests new developments in this area.

Other measures for encouraging greater private investment in education and training relate to the supply side. Increasing the transparency and reliability of qualifications is likely to encourage individual and employer investment in training by making it easier to value the outcome of such investments, although this is not explicitly discussed in the reports. The effort in many countries to reform their qualification systems to conform to more precise specifications of skills and competences, as well as the changes toward greater transparency involved in the Bologna process, should add to the transparency of qualifications and encourage greater investment in education and training. In general, improvements in the quality of education and training provision would be expected to encourage more investment

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[24]   Ibid.

[25]   The Education and Training 2010 Working Group E paper 'Making the Best Use of Resources' based on 2004 Survey found evidence of PPP type initiatives in Flanders, Denmark, France, Hungary and the UK. The ETF Report 'VET Financing in the New Member States and Candidate Countries', 2005, found PPPs the Czech Republic, Slovakia, Lithuania and Turkey, often for the development of ICT.

[26]   European Commission: 'Implementing lifelong learning strategies in Europe: Progress report on the follow-up to the Council resolution of 2002, EU and EFTA/EEA countries' (December 2003).

in education and training amongst individuals and employers. Achieving higher quality in provision is a major priority throughout most of the reports.

3.5.   Increasing the Efficiency of Investment

A number of reports discuss in general the importance of making better use of resources, but many are not specific about the means to do this. Generally, quantitative goals are not set for efficiency gains and there is little evidence provided that measures adopted are increasing efficiency[27]. Increasing efficiency through improving quality is the major theme for reform for most countries. Measures to reduce the costs of achieving given outputs are less frequently discussed. The main areas where policies are noted for improving cost efficiency relate to institutional regulation and management and funding allocation systems.

3.5.1.   Decentralisation

Many reports (e.g. **AT, BG, CY, EE, ES, FR, HU, LT, PT, RO,** and **SK**) mention reforms to decentralise decision making (to regional, local or institutional levels) as a way of improving cost efficiency (i.e. by making institutions more aware of costs and bringing decisions making closer to demand). Increasing institutional autonomy, including in relation to budgets, is one form of this specifically mentioned in a number of reports (e.g. **AT, BE–nl, DE, FR, ES, NL, NO** and **SI**). In addition to noting the potential gains of decentralisation in terms of improving cost efficiency, a number of reports also note unwelcome effects in terms of increasing fragmentation, for example **Hungary**, or increasing inequalities between institutions or regions.

3.5.2.   Funding Systems

Decentralisation often involves parallel changes in funding allocation mechanisms. Devolution of control to institutions often means changes towards lump-sum budgets or block grants where the institutions have more discretion over how to spend the budgets. This is thought to lead to more cost efficient decisions. There is an increasing trend towards this[28]. The **Netherlands** is extending its lump-sum funding system from secondary to primary schools. **Slovenia** reports developing lump sum funding for secondary schools and **Croatia** reports aiming to implement new lump sum funding system for higher education by 2006. The ETF notes a general trend towards this type of arrangement in new Member States and candidate countries[29].

The introduction of more transparent forms of formula funding is commonly reported as a way of increasing efficiency. In most cases this is through the introduction of per capita funding systems. Many countries report that they are developing, extending, or about to introduce this kind of system at different levels (**AT, BE, DK, EE, LT, NO** and **SK**). **Finland, Germany,** and the **UK** report having elements of outcome-related funding for some institutions, and a number of countries report that they are developing or extending such systems (**AT, DE, EE,** and **FI** for universities and polytechnics). Value-added based funding attempts to reward institutions for student learning gain. The means for assessing aggregate

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[27]   See also EC Working Group E progress report:
http://europa.eu.int/comm/education/policies/2010/objectives_en.html#making .

[28]   Conclusion of ETF Report, 'VET Financing in the New Member States and Candidate Countries', 2005.

[29]   Ibid.

learning gain at the level of the school, which would make this approach possible, have for example been developed in the **UK**. Attaching funding to learning gain would provide incentives to educational institutions to teach more effectively, rather than to select more pragmatically, and could therefore be considered both a more efficient and more equitable means of institutional funding.

3.5.3.   Improving management

Improving institutional management and public administration is also seen as a means to greater efficiency in some cases (**AT, BE-nl, DK, FR, HU LT** and **PT**). A few countries mention the introduction of the measures and systems that might support this. The use of Management Information Systems and Performance Management Systems are reported in a few countries (**EE, IE, LT, TR** and the **UK**), although a number of countries are seeking to standardise teacher contractual conditions, such as in **Austria**. **Performance-related payment** for teachers is rarely discussed, although **Sweden** mentions new measures to give school heads more discretion in determining teacher pay. The Education and Training 2010 Working Group E 'Mapping Analysis' found no clear patterns of performance-related pay for teachers across Europe[30].

Other Efficiency measures mentioned in the reports include:

-        School mergers (e.g. **EE**, **PT** and **SK)**

-        Encouragement of institutional income generation, mostly in universities and polytechnics (**FI, BE-nl**-university contract research, **AT, RO** and **SK)**

-        Cooperation between schools-**BE-nl** has established school cooperation communities for more efficient use of funds;

-        Energy efficiency in buildings (e.g. **BG** and **LT**)

-        Reducing study time to reduce costs per graduate-**Austria** and **Finland** in relation to higher education where students get tax relief if they finish studies in the approved period, and **Norway**'s recent measure to convert loans into grants for students completing on time[31]. The **Netherlands** also has such a system in place.

3.6.   Monitoring Effectiveness

The national reports demonstrate an increasing and widespread concern with quality assurance and evaluation. However, countries vary substantially in how far advanced their systems for evaluation and monitoring are in practice.

Some countries monitor student performance, teacher performance, institutional performance and system performance through a range institutional mechanisms including: government inspectorates, independent statutory statistical and evaluation agencies, institutional quality assurance systems, student feedback procedures and national students testing systems. Most

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[30]   Education and Training 2010 Working Group E, 'Making Best Use of Resources'.
[31]   The ETF report, 'VET Financing in the New Member States and Candidate Countries, 2005, states that new Member States and candidate countries are rapidly increasing short applied higher education courses.

countries seem to make use of international comparative data on outcomes (PISA, etc) to assess their system performance but many would not appear to have developed a full set of national performance indicators or to collect the necessary data.

Systematic evaluation of institutional performance based on quantitative measurements would appear to exist only in a minority of countries. Even in these cases evaluation is only beginning to benefit from the development of more robust methodologies for measuring value-added or learning gain. Regular national testing of student performance only occurs in some countries. The use of robust methods to evaluate the impact of reforms is probably very rare indeed. There are strong intentions and efforts in most countries to develop better quality assurance systems, in line with the Lisbon objectives, but the methods for evaluation are still relatively underdeveloped, particular in relation to cause and effect and policy impact.

3.7.   Conclusions

The need to invest more in education and training is widely appreciated. Most countries recognise that developing coherent lifelong learning strategies and meeting the Lisbon objectives will require higher levels of investment and that this investment will need to come both from the State and from individuals and employers. Efforts have been made in many countries to encourage greater individual investment and there is some evidence that this has been successful. Efforts to encourage employers to invest more have been less extensive and their effectiveness is less demonstrable.

Most countries are aware of the need to increase efficiency in their use of resources in education and training. This is most often manifested in measures to improve quality in the supply of education. The reports for many countries place less emphasis on measures to increase cost efficiency. Where such matters are addressed it is mainly in terms of reforms that seek to increase efficiency through decentralisation and more transparent forms of public funding allocation. There is very little discussion, however, of how effective these measures are, and no report provides evidence from any evaluations of impacts from such measures.

Many reports emphasise the importance of social inclusion, particularly in terms of achieving greater access for currently marginalised groups such as immigrants, ethnic minorities and those with special educational needs. However, relatively few address the needs of older people and the importance of active ageing.

The focus is on how countries perform overall, rather than how groups perform relative to each other, and this is reflected in the fact that the indicators used mainly concern aggregate educational outcomes rather than distributional outcomes (i.e. how evenly educational achievements are dispersed). Some countries do note the possible unwanted effects of decentralisation measures in increasing inequalities of funding between regions, and rectifying regional inequalities in funding is an explicit aim in several countries. Discussions of fee charging for higher education students are also frequently accompanied by consideration of effects on equity and measures to mitigate these, such as grants and loans for those from less affluent families. However, discussions on other topics, such as the private supply of education services or reforming funding mechanisms, rarely reflect on the effects these may have on equity.

Equal opportunities for access to higher education are widely considered, but inequalities in access to adult learning and work place training remains a key challenge.

4. PUTTING IN PLACE COHERENT AND COMPREHENSIVE LIFELONG LEARNING STRATEGIES

4.1. Progress in adopting national lifelong learning strategies

The ambition set by the Council and the Commission and supported by the European Council is that by 2006 all Member States should have in place comprehensive and coherent lifelong learning policies[32]. Comparison with the earlier 2003 lifelong learning reports[33] enables us to form a judgement as to whether, two years later, the 2005 national reports provide evidence as to the extent to which this ambition is being realised. Many, but by no means all, countries have developed or are developing over-arching statements on lifelong learning.

The countries that have adopted or are at some stage of adopting broad strategic statements include: **Austria, Belgium-fl** and-**fr**, **Bulgaria** (early stage)**,** the **Czech Republic**, **Denmark**, **Estonia**, **Finland, Netherlands**, **Norway, Poland**, **Germany**, **Hungary**, **Iceland, Ireland**, **Latvia, Lithuania**, **Slovenia**, **Spain, Sweden**, the **UK** (separate strategic statements across the devolved administrations in **Scotland, Wales, Northern Ireland** as well as **England**).

In **Cyprus,** plans are under way to set up and action plan for lifelong learning, and in **Malta** a ministerial review is expected to lead to a national action plan for lifelong learning. Furthermore, some countries have enacted framework legislation covering various aspects of lifelong learning. **France** has adopted the 2004 *"Loi sur la formation professionelle tout au long de la vie"* and the 2005 *"Loi d'Orientation"*, and a series of other legislative measures, **Greece** has now adopted *'systemisation of lifelong learning and other stipulations'*, **Romania** adopted legislation in 2000 for the organisation and functioning of lifelong learning systems in educational institutions, but with separate legislation and policies for different phases. **Spain** enacted the *'Organic Law on Education'* in 2004.

Some countries with federal or devolved systems for education and training (e.g. **Belgium, Germany** and the **UK**) face structural barriers to framing overarching policy and legislation for all areas of lifelong learning across the whole territory. **Germany** provides insight into how a Member State with a federal constitution can develop a strategy for lifelong learning which identifies the aspects and contexts on which there is a broad consensus. In **Luxembourg**, many people in the labour market travel from neighbouring countries, making government-led coherence difficult to achieve.

4.2. Coherence and comprehensiveness of strategies

Countries vary on several axes. These include the extent to which the strategy has been formed, the priorities of the lifelong learning strategy including the weight given to economic and social aims, and the extent to which implementation is underway. In this regard, some reports point out that major reforms in education take time to have effect.

The 2005 national reports show that, despite having improved in terms of their coherence, lifelong learning strategies still tend to reflect similar imbalances to those identified in the

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[32] The definition of lifelong learning is: "All learning activity undertaken throughout life, with the aim of improving knowledge, skills and competences within a personal, civic, social and/or employment-related perspective", Communication on lifelong learning (COM (2001) 478).

[33] See Footnote 8.

European Commission's 2003 progress report on this issue.[34] In other words, it is possible to distinguish between broadly different approaches to lifelong learning found in Europe. These range from 'cradle-to-the-grave' strategies, to largely employability-related approaches, to approaches where social inclusion is the main focus for lifelong learning policies. Such a typology may help countries to form an overview of the approaches to lifelong learning that are described and analysed in the national reports. The proviso attached to any typology of this kind is that it must be taken with care and treated as indicative rather than conclusive.

In terms of implementation, countries are at widely different stages. Using the self-analysis contained in the reports as the source of evidence we can illustrate the range:

- Some countries have well-advanced lifelong learning strategies, achieving highly on all of the indicators for education and training, and target resources to tackle identified priorities that remain, (e.g. **DK**, **FI**, **NO** and **SE**).

- Some have defined priorities and agreed clear lifelong learning strategies with key stakeholders, and have built them as a centrepiece into their reform programmes and priorities. Yet, while some of the priority issues are being tackled successfully, the national reports record need for improvements in other respects (e.g. **BE** (**-fr** and **–nl**), **IE** and **NL**). **Ireland** has developed a National Framework of Qualifications, which it uses for many purposes including bringing coherence to lifelong learning policy implementation.

- Other countries have emerging lifelong strategies, and are setting about meeting challenges – but describe themselves as having a long way to go to meet success, in spite of good achievements against some of the indicators (e.g. **CZ**, **DE**, **EE**, **FR** and the **UK**). On the other hand, both **Slovenia** and **Poland**, who describe their lifelong learning strategies as in formation, are making rapid progress and perform creditably on several priority indicators.

- Some countries can be described as having an emerging lifelong learning strategy, in several areas at an early stage of implementation (e.g. **IT**). **Latvia** and **Lithuania** both describe how aims and priorities have been identified and the legal framework for reform and organisational framework for wide cooperation have been developed. **Portugal** describes how pre-conditions have been achieved for setting up a lifelong learning strategy, but this has not yet reached full definition despite some progress in the implementation of specific measures. **Greece** has also developed a new strategy based on a combination of reforms involving key stakeholders.

- In others still, many initiatives and reforms are taking place but a much more structured and coordinated approach to lifelong learning is needed to meet the needs of individuals and the economy; this is 'in the pipeline' (e.g. **MT**).

- Some other national reports, including Bulgaria, describe initiatives without the coherence that would suggest a comprehensive lifelong learning strategy, even in its early stages. **Romania** indicates that so far no global, integrative and coherent approach to lifelong learning has been agreed, nor has a partnership approach.

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[34]   European Commission: 'Implementing lifelong learning strategies in Europe: Progress report on the follow-up to the Council resolution of 2002, EU and EFTA/EEA countries' (December 2003).

Turkey reports being determined to come to terms with some basic challenges, but is, as are a few other countries, still at an early stage.

4.3.   Progress towards implementing lifelong learning objectives

The national reports provide an analysis of progress, difficulties and challenges that countries experience in their efforts towards achieving the agreed lifelong learning objectives, including the EU benchmarks and other lifelong learning priorities. The Commission 2005 Progress Report on indicators and benchmarks provides data that places the national reports in a comparative framework.

As regards the benchmarks in particular, the EU would be more likely to achieve its 2010 goals if countries in the middle range of performers made significant progress. Positive developments are reported in a number of new Member States including **Lithuania**, **Poland** and **Slovenia**. However, the reader must be careful to avoid an over optimistic assessment of some of the data. In particular, some of the countries achieving high levels of upper-secondary completion and low levels of early school leaving, perform poorly in terms of basic competences of 15 year olds. Furthermore participation in adult learning is a key indicator for success in lifelong learning: most countries perform poorly in this respect and give it little emphasis for funding.

4.3.1.   Participation rates of adult learners

Achieving major improvements in participation rates in continuing education and training on the part of adults is one of the five reference levels of average European performance, or benchmarks[35]. This implies systemic increases in levels of participation in adult learning and training, particularly on the part of specific target groups for which current levels of training are low. This includes women, older workers, those with lower levels of initial qualification, and workers in industries that have low training participation rates.

On current trends, however, the EU has considerable progress to make before achieving the benchmark for participation in education and training on the part of adults aged 25-64[36]. The EU benchmark is that by 2010 the EU average level of participation in education and training should be at least 12.5% of the adult working-age population[37]. The participation rate is increasing slowly: the percentage of the working age population participating in lifelong learning amounted to 9.9% in 2004, representing insufficient progress to meet the benchmark. Furthermore, in percentage terms, the participation gap between those with high and those with low educational achievement is widening.

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[35]   The rationale is that Europe's ageing workforce will have to achieve higher levels of skill than is currently the case in most countries, and individuals in the labour market need to sustain the mobility that changing work organisation and the likely consequences of global changes require, as Member States embrace their own versions of a learning society and learning economy.

[36]   The data and information for this paragraph is drawn from the 'Commission Progress Report on indicators and benchmarks 2005', chapters 1 and 5.

[37]   Working-age is defined as people aged 25-54. 12.5% refers to participation in some form of education or training over the 4 weeks prior to the survey. The source is data gathered for the European Labour Force Survey. If a longer period were used, rates would be higher. Eurostat data from a survey carried out in 2003, referring to a 12-month period, show a participation rate of 42% (4.4% in formal education; 16.5% in non-formal learning and nearly one European out of three declared having taken some form of informal learning).

A wide disparity exists between high-and low-performing countries. **Sweden, Denmark** and **Finland** are Europe's top performers in relation to the benchmark in this area and the **UK** also records participation rates of above 20%, thus exceeding the EU benchmark. **Slovenia** and the **Netherlands,** which aims to reach 20% participation by 2010, already meet the benchmark. The European Commission reported in 2005[38] that all the other EU countries and two of the candidate countries have participation levels still considerably below the target level.

The national reports on lifelong learning shed some light on how some countries are currently achieving rapid progress. **Austria**, for example, reports that permeability, second chance schooling, continuous reform of VET and the promotion of adult learning are the identified priorities and that in 2005 alone the budget for general adult learning has increased by 28%. In **Slovenia** there is a clear drive to link existing adult and tertiary education strategies to the emerging lifelong learning strategy. In **Sweden**, the 'Adult Education Initiative' that ran from 1997-2002 targeted mainly adults with low levels of formal qualifications and the programme reached in total 20% of the workforce. **Denmark** describes its approach to lifelong learning as being sufficient to ensure that all the EU benchmarks for education and training are met. Non-traditional approaches to engaging learners have been developed in most of these countries, and the countries that show most success and most rapid increases in this area all spend above the EU average on education and training and have specifically targeted adult learning or adult workplace learning. In **Italy** the education provision for adults is being developed, in particular through local adult learning centres (CTP).

With the expected impact of demographic change, special attention has to be given to the skills upgrading and competence development of older workers. The target for the employment rate for 55-64 year olds was fixed at 50% in 2001 at the Stockholm European Council. Older workers are currently under-represented in the uptake of training, though it could certainly contribute to increasing their employment rate. The need for older workers to update and adapt their skills is a very serious challenge, particularly since they tend to have fewer formal qualifications than younger workers. The rate of adult participation in education and training in 2004 in the EU25 reached 9.9%. However for older workers in particular, the rate was considerably lower. Just over 4% of 55-65 year olds undertook training as compared with 14% of 25-29 year olds[39].

Numerous barriers to achieving high levels of participation among adult target groups are cited in the national reports. The following are prominent:

- Insufficient priority is given in national policies and spending plans, and national cultures that do not see continuing vocational training (CVT) or adult participation in a positive light are difficult to shift

- Employers (particularly SMEs) are reluctant to invest in training, and individuals are reluctant to participate. Stakeholders tend to be ignorant of the benefits of learning

- Governance is slow to reform, compartmentalised and takes an ad hoc approach

- There is a lack of coherent data

- Early school leavers and other target groups are reluctant to return to learning; and

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[38]   Page 70 of the *'Commission Progress Report on indicators and benchmarks 2005'*.
[39]   Labour Force Survey, Eurostat, 2003.

-       Both work organisation and learning provision tend to be inflexible.

4.3.2.   Key competences

Three EU benchmarks examine the extent to which compulsory schooling and the post-compulsory phases of education and training equip young people with the knowledge, skills and competences that they will need to thrive in a knowledge society and economy. These are:

-       Reducing levels of early school leaving

-       Raising completion rates at the upper secondary level;

-       Improving literacy and basic competences at age 15.

The Commission's 2005 Report on 'Progress towards the Lisbon objectives in Education and Training'[40] provides the best available evidence on progress towards these benchmarks.

(i)   Reducing the numbers of early school leavers

The EU benchmark is that by 2010 an EU average of no more than 10 % of early school leavers[41] should be achieved. In 2004, only **Austria, Croatia** the **Czech Republic, Denmark, Finland, Lithuania, Norway, Poland, Slovakia, Slovenia** and **Sweden** had levels of early school leaving below the 10% target and – while caution must be used when interpreting all the data – eight countries' performance had worsened between 2000 and 2004. Overall, boys perform less well than girls. There is a marked gap between the participation rates of high and low socio-economic groups, and this grows more prominent with higher-level qualifications. The same is true for non-nationals and migrants.

At the current rate of improvement the ratio of early school leavers will be 14 % in 2010, and therefore more substantial efforts are needed for the EU to reach the benchmark. Addressing the situation effectively will require sustained and successful policy interventions in many countries. The countries with the lowest performance are currently **Bulgaria, Cyprus** and **Malta,** (which indicate in their national reports that they are now making progress in terms of raising upper secondary participation and reducing early school leaving) **Italy, Portugal**, **Romania, Spain** and the **UK**. **Portugal** and **Italy** are reporting steady improvement over the last three years. In **Italy,** the government has funded initiatives in the national education system to encourage and incentivise improved staying on rates. The **UK** is also making some progress: one measure reported to have an impact is the recent introduction (in parts of the UK) of means-tested allowances (education maintenance allowances) for 16-to-19 year olds who remain in education. **Turkey** has expanded upper secondary education from three years to four years and plans to expand compulsory education from eight years to 12 years, including years of upper secondary education. In **Hungary** the 'Development Programme for Vocational Training Schools' targets the reintegration of disadvantaged students into the education system. Within this framework specific measures are targeting pupils, who have not completed lower secondary education, encouraging them to take up vocational training.

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[40]   Op. cit. chapters 2 and 6.
[41]   Early school leavers are defined as people who have left school with only lower-secondary education, in the 18-24 age cohort.

(ii)   Completion of upper secondary education

The EU benchmark is that by 2010 at least 85 % of 22 year olds in the European Union should have completed upper-secondary education. The average rate across the EU improved with the accession of the new Member States[42], but the present average rate of upper secondary completion at age 20-24 stands at 76.4 %. Given the rate of overall improvement between 2000-2004, the benchmark will be difficult to achieve in 2010, and therefore increased efforts are required in this area.

Several countries (**AT, CZ, IE, LT, NO, PL, SE, SI** and **SK**) already have completion rates above the EU benchmark, while others (**BE, CY, EE, EL, FI, FR** and **HU**) are close to reaching it. However, improvement towards this target is slow, although the two countries that perform the least well (**MT** and **PT**) are making comparatively rapid progress. **Portugal** aims to double participation in technical and vocational courses by 2010, to build basic competences during compulsory schooling and to expand and diversify pathways. In order to increase levels of participation and qualification at upper secondary level, **Malta** has integrated its vocational colleges to provide a more coherent and flexible offer, and provides financial support for post-compulsory students, and more young people (as well as employers) are attracted to take up vocational pathways. **Italy** has launched single system comprising two pathways with equal status: general education and vocational education and training, with the possibility for learners to move from one pathway to the other.

(iii)   Improving literacy and basic competences at age 15

The EU benchmark is that by 2010 the percentage of low-achieving 15-year olds in reading literacy[43]   in the EU should have decreased by at least 20 % compared to the year 2000. In 2000, 19.8% of students were at or below level 1 (i.e. low-achieving), and a reduction of 20% in 2010 would mean bringing this percentage down to 15.5%. For the EU countries for which there is comparable data over the two years[44], there is no overall reduction in the proportion of students performing at or below level 1 of the PISA scale. Given that there is no overall progress, this benchmark, like those cited above, is a major challenge for the EU to achieve by 2010.

Nevertheless, a number of countries instigated reforms after PISA 2000, and it is to be hoped that these will bear fruit by 2010. Reforms in **Germany**, **Austria** and **Norway** have already been mentioned in this report in this respect. After a national debate to identify reform priorities a *socle commun* is to be introduced in **France**, placing emphasis on the entitlement of all children in compulsory schooling to acquire the key competences. The different parts of the **UK** have been developing and implementing their strategies for improving literacy and numeracy for some years. The **Czech Republic** is implementing reforms focused on the modernisation of initial education to strike a balance between key competences, knowledge, attitudes and values.

Performance on the PISA scales varies greatly between countries in terms of the average scores, the extent of the distribution of scores, and the extent to which school-and social-

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[42]   On average, the staying on rates are higher in the EU10 than in the EU15.

[43]   The benchmarking is based on the PISA survey, for which results are now available for the years 2000 and 2003. Highest proficiency is at level 5, while level 1 is a basic level of competence at which students are capable of completing only the least complex reading tasks developed for PISA.

[44]   Comparable PISA data for the 2000 and 2003 tests exists for 16 EU countries.

factors affect performance. **Finland** not only performs very highly in all the PISA tests, but also has the lowest proportion of low achievers, followed by **Ireland**, the **Netherlands, Sweden**, and **Liechtenstein**. **Sweden** reports that an 'uneven' distribution of resources in favour of pupils with special needs is laid down in regulations. Among the (19) countries for which published results are available for 2003, **Hungary**, **Austria**, **Spain**, **Portugal**, **Germany**, **Luxembourg**, **Italy**, **Slovakia** and **Greece** all have in excess of 20 % of 15-year-olds at or below level 1. It should be noted that some new Member States such as **Slovakia** and **Hungary** perform well in terms of upper secondary participation and early school dropout, compared to a much poorer performance on the part of 15 year olds in basic competences. This suggests the need for continuing modernisation of the curriculum and programmes of study in some of the new Member States, notwithstanding their high performance on some indicators, if the wider goals of lifelong learning are to be achieved. **Turkey** has entered PISA for the first time as part of the modernisation process and, as the government had anticipated, the proportion of low achievers was well in excess of other countries in Europe. Reforms of primary and secondary education curricula tend to focus on outcomes and the development of key competences.

4.3.3. *Non-formal learning*

The inventory on validation of non-formal learning[45] shows that a few countries (e.g. **FI, FR** and **PT**) have well-established systems for validation, while several others have recently introduced measures, or are in the process of doing so (e.g. **BE-nl, DK, ES, NL, NO, SE** and **SI**). Virtually everywhere validation is an important topic in the context of national debates and reforms, despite the wide range of levels of development and implementation.

According to the national reports several countries, including **France, Belgium (-fr** and **–nl),** and **Portugal**, indicate that they have recently introduced regulations and systems for the validation of informal and non-formal learning based on the jury-evaluation of portfolios. These should lead quite gradually to increased numbers of people gaining recognition for informal and non-formal learning. **Finland** indicates the success of its longer-established *Noste* reforms, based on competence assessment in the workplace, in bringing recognition to the informally acquired knowledge and competences of large numbers of workers. All, or almost all countries are in agreement on the importance of developing effective systems for recognising informal and non-formal learning in response to major labour market, qualifications and demographic trends. The challenges involved are hinted at in the country report of the **Netherlands** stating that in many respects the 'leap' from formal to non-formal learning pathways has not yet been made. While countries recognise the importance of this aspect of reform, this probably reflects the situation in many countries. Many governments recognise this to be an important area for development, but development is at an early stage; for example **Slovakia** faces both a lack of public awareness and some resistance from education providers.

4.3.4. *National Qualifications Frameworks*

The development of a national qualifications framework is seen by many countries as a key means of enabling lifelong learning. The principal aims of a qualifications framework are to clarify for all users and stakeholders the main routes to a particular qualification, how

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[45]   The Inventory on validation of non-formal learning is available on:
       http://www.ecotec.com/europeaninventory.

progress can be made, to what extent transfer is allowed (including the use of credit), on what basis decisions for recognition are taken (including through validation of non-formal learning), etc. Qualification frameworks are also used for quality assurance and development purposes[46].

Qualifications frameworks have been, or are being, established in many countries and sectors (in Europe and beyond) and take many different forms according to national and sectoral specificities. Common to them all is a wish to tackle the increasing complexity of modern education, training and learning systems.

A small number of countries, for example in **Ireland, Northern Ireland, Scotland** and **Wales** have adopted single national qualifications frameworks, covering all levels of education and training, including continuing education and training. **Belgium-nl** is moving rapidly in this direction. In **France**, **Denmark**, and **Finland**, for example, well developed competence-based VET qualifications systems, including validation of non-formal learning, allow the linking of different subsystems. Other countries have adopted a system of reference levels for vocational qualifications (e.g**. EE, ES** and **NL)**. Finally, an example of a country where the development is at an early stage of development work is **Romania**, where a Qualifications Authority has been set up (within the National Adult training board) to support the development of an national qualifications framework covering all VET qualifications. The development of national qualifications frameworks seems partly to be inspired by developments in non-European countries and increasingly by the work on a European Qualifications Framework (for example in **Germany**)[47].

4.3.5. *Partnerships*

The national reports point up clearly the importance of cooperation for effective governance of lifelong learning. This consists partly in effective working arrangements between different government departments, not least between education and labour ministries, and in the active involvement in partnership of social partners and other key stakeholders such as parents and teachers/trainers, the voluntary sector and local actors. Such partnerships are not widespread, however, and the national reports identify barriers to achieving them.

Other reports, particularly the Maastricht Study[48], have highlighted the role of learning partnerships, which often involve government or local administration, schools and universities (the learning providers and researchers), industry and the wider community in generating and sustaining innovation. Much innovation of this kind takes place at the local or regional level. The barriers to achieving lifelong learning reported at the end of this section serve as a reminder of the challenges the countries face in developing both coherent governance and innovative learning partnerships.

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[46]   'Towards a European Qualifications Framework for Lifelong Learning', Consultation Document, 2 June 2005.

[47]   As far as the recognition of professional qualifications in the field of regulated professions is concerned, the Directive on professional qualifications adopted on 6 June 2005, and published in the Official Journal of the European Union L 255 of 30 September 2005, is the legal instrument at EU level that is binding on Member States in this field. This Directive replaces 15 directives in force for many years.

[48]   Maastricht study, 'Achieving the Lisbon Goal: The contribution of VET', 2004, http://www.europa.eu.int/comm/education/policies/2010/studies/maastrichtexe_en.pdf.

4.3.6.   Education and training of teachers

Most countries report that extensive reforms to teacher education have taken place or are under way. Thus, the **Czech Republic** report, for example, indicates the importance of training teachers for their new role in a knowledge society. While several countries, including **Norway,** report that teacher training is already an integrated part of higher education, a common denominator is to bring teacher education into line with the Bologna structures for higher education; this implies that a single structure for teacher education is tending to supersede the more varied structures for different phases that have existed in many countries. A number of countries, including **Austria** and **Hungary**, link the Bologna process to raising the standards of teacher training and to introducing or improving provision for continuing training. Countries that emphasise this factor, including **Estonia**, are in the process of identifying national occupational standards and an identified set of competences for effective teachers. Some countries link this development to the extension of school autonomy, approaches to lifelong learning and to more individualised student learning plans.

Similarly, the initial and continuing training of VET teachers and trainers is raised in several reports (see section 6). Several of the national reports emphasise the importance of training teachers for particular subjects, including languages, or phases, including more inclusive provision of early years teaching and care for target groups of at-risk young people. Though some countries, including **Finland,** mention the expansion of teacher training, few are explicit on the challenge of raising the status or rewards of teaching as a measure to respond to the ageing professional profile, although several mention the growth in assistants and para-professionals.

4.3.7.   Information and Communication Technology (ICT)

Most countries indicate that that making maximum and best use of ICT in education and training remains a high priority, although it is not a new priority for most. Thus, **Denmark** indicates that using technology to the full is a characteristic of virtually all new measures, aimed to ensure that learners learn ICT literacy and skills to the best possible level. The emphasis is on integration across schooling, training and teacher education, and many countries indicate that the resources allocated have increased. Several countries highlight that ICT opens up possibilities for varied and flexible learning (e.g. **EE**), ranging from assessing ICT skills (the **UK**, for 14-16 year olds) and outcomes for learners with special needs (e.g. **DK**), to up-skilling people in the workplace (e.g. **IE**) and improving access to work for low-skilled women (e.g**. ES**), as well as the professional development of teachers. **Norway** reflects on the need to integrate ICT better into learning processes and suggests that it is a major challenge for the education systems of tomorrow to integrate ICT and digital learning as a natural part of all teaching and learning at all levels in the system.

4.3.8.   Lifelong Guidance

Although this does not appear as such a high priority as a number of other areas for reform in several national reports, the development of guidance systems is accorded a measure of priority in many reports. Countries such as **Denmark** and **Belgium** relate that reforms under way aim to offer young people relevant, independent guidance to provide an adequate basis for making education and employment decisions. In terms of integrating guidance services, the **Czech Republic** describes ambitious work that is under way to develop both horizontal integration (different systems operated by the education and labour ministries) and vertical integration (guidance for all stages of lifelong learning), while **Estonia** also describes moves

towards more integrated systems. In **Finland**, on the other hand, guidance services appear to be differentiated to meet specific needs, whether in schools or in the skills market. A number of new member States, including **Hungary** and **Poland**, describe the difficulties that guidance systems have worked under through the period of transition, as well as measures for reform.

4.3.9.   Pre-school education

Virtually all of the national reports that mention this aspect agree on the importance of early years as laying the foundation for successful learning later in life. **Poland**, for example, describes the small proportions of children in pre-school education, particularly in rural areas, as a major challenge, while **Portugal** shows that raising the numbers of young children in pre-school education over the past decade has been an important prerequisite for other reforms. **Norway** emphasises the importance of reaching groups at risk of exclusion, specifically children from minority language backgrounds, disabled children and children in danger of developing reading and writing difficulties. In some countries, such as **Latvia**, this has led to changes in the regulations on schooling and in teacher training; indeed, the national report states, **Latvia's** improvement in international surveys is largely due to the concentration on meeting needs of low-achieving young people.

Many countries have introduced new programmes for early years learning, though it is not always clear from the national reports whether the emphasis is on learning through play or the introduction of more formal learning, or in what combination. As **Denmark** points out, some traditional distinctions are becoming blurred, as pre-school classes become more part of compulsory schooling. This blurring is reflected in the OECD's use of the term 'Early Childhood Education and Care' to cover the spectrum. The unanimity on the importance of early learning on later performance probably signifies that this aspect merits higher priority in the open method of coordination and peer learning activities.

4.4.   Obstacles to creating a culture of lifelong learning in Europe

Countries vary in the ways in which they have presented the obstacles to lifelong learning. Some national reports are explicit about challenges, difficulties and obstacles; some do not refer directly but give indications elsewhere in the text. However, on balance, countries are becoming more open in describing their difficulties to their international peers. Furthermore, as the reports are written, descriptions of challenges to be tackled overlap with the analysis of descriptions of barriers to creating a culture of lifelong leaning. **Estonia** offers the view that it is more a matter of challenges, rather than barriers, the greatest challenge being the creation of a funding system for adult education. **Portugal**, among others, offers a clear analysis of its main barriers. **Slovenia** offers a summary analysis of both factors for progress and barriers.

The national reports cite a wide range of barriers to creating a culture of lifelong learning. These cluster round seven main issues: governance; funding; imbalances in public, employer and individual approaches to lifelong learning; the supply of education and training; labour market imbalances; the supply/ training of teachers and trainers; and, international links. The main barriers that the countries identify are cited in the table that follows.

Table: Examples of the main challenges and barriers to lifelong learning identified in national reports

Governance	Incoherence in approach to lifelong learning
	Lack of effective cooperation within devolved frameworks
	Lack of legal framework for continuing learning and CVT; Compartmentalisation of responsibilities;
	Lack of political mandate or of continuity of policy linked to frequent reforms that are not given time to bed in;
	Reform is slow;
	Slow to extend decentralisation;
	Lack of coordinated data.
Funding	Under-investment
	Competing priorities for funding, specifically in VET;
	Lack of local funding for full participation in EU programmes (candidate countries).
Imbalances in public, employer and individual approaches	Unequal access to training, in some cases due to growth of marginalised populations
	Traditional cultures reluctant to shift
	VET skills and qualifications are insufficiently valued
	Too little attention to early schooling and intervention;
	Too little attention to adult learning for older workers, disadvantaged groups or isolated populations
	Early leavers reluctant to re-enter learning.
	Increasing early drop out
	Reluctance to enter science, maths and technology;
	Difficulties in finding new ways to combine working and learning;
	Low take-up from low-skilled individuals to make use of their educational opportunities;
	Employers and employees not convinced of returns to training
	SMEs reluctant to engage
	Legacy of only moderate education achievement.
Supply of education and training	Reluctance of schools to move to competence-based curriculum or to move from memorisation to problem solving
	Difficulties in meeting the needs of migrants and other target groups
	A lack of: transparency/status/quality of VET
	Disappearance of guidance with major changes
	Lack of or insufficient approach to recognising informal/non-formal learning
	Insufficient pathways linking VET and higher education

	Lack of flexible adult provision
	Rising demands and rising population
	Lack of cohesion between pathways.
Labour market imbalances	Mismatch between supply/demand
	High incidence of low basic skills in many sectors.
Supply/ training of teachers/ trainers	Teacher training requires modernisation
	Insufficient supply of skilled teachers.
International links	Insufficient mobility
	Difficulty in linking higher education levels with other systems.

4.5. Conclusions

In response to the ambition agreed by the European Council that by 2006 Member States should have in place comprehensive and coherent lifelong learning policies, the national reports indicate that many countries have adopted or are adopting overarching vision statements on lifelong learning, although these are at different stages of conception and development. In some countries this is supported or replaced by framework legislation. Some countries report that a clear national strategy document is not yet in place, while a number of countries with federal constitutions or devolved authorities report on the unlikelihood of a single national document.

Country priorities for lifelong learning show a considerable variety. While some countries emphasise meeting the needs of the learner irrespective of age, stage or context, others make a strong distinction between formal education (whether paying particular attention to early years, secondary or higher education) and meeting the needs of adult learners. All countries cite the importance of social inclusion as well as a more directly economic agenda, and some countries place strong emphasis on the former.

Similarly, there is a marked variety in terms of how far down the road countries are towards achieving the EU education and training benchmarks. The continuum between countries in this respect is certainly a long one. The position for large numbers of Europeans in disadvantaged adult groups (by education level, age, gender, occupation and status) is likely to leave most countries far short of the EU benchmark for adult participation in lifelong learning, unless barriers can be overcome a rapid progress achieved. Equally, it is disappointing to record that the data show that none of the benchmarks for raising basic skills among young people, tackling early school leaving and raising levels of participation in the upper secondary phase are likely to be reached in 2010 on the basis of current trends.

The main obstacles and barriers to achieving lifelong learning, as highlighted in the national reports, cluster round several issues: governance, funding, imbalances in the approaches taken by governance, employers and individuals, the supply of education and training, the inadequate supply and training of teachers and trainers, labour market imbalances, and difficulties in achieving effective international links.

5. HIGHER EDUCATION REFORM

5.1. Higher Education in the Lisbon strategy

The Bologna reforms are put very much in the foreground for reforms in higher education, while the Lisbon agenda plays an implicit rather than an explicit role in this sector, for example concerning the issues of knowledge transfer and cooperation between higher education and industry which are central. Thus issues raised are fully in line with the Lisbon Strategy but are not necessarily identified with it.

The Communication from the Commission "Mobilising the brainpower in Europe"[49]underlines the importance of better system and institutional management in higher education and highlights the fact that European universities[50]call for more autonomy in order to be able to make necessary changes for the future, but with retained or even strengthened State responsibility for the higher education system as a whole. The Communication proposes that universities should be responsible for medium-term priority setting, managing and developing human resources, defining curricula and professionally managing their facilities and financial resources. The Commission calls for all Member States to take action ensuring that their regulatory frameworks enable and encourage university leadership to undertake genuine change and pursue strategic priorities. This should include multi-annual agreements and empowering universities to take and implement decisions by way of a leadership team, which has sufficient authority and management capacity.

5.2. Compatibility of structures and degrees

Current higher education reforms in all countries are very much focused on introducing the three-cycle structure of degrees. Appropriate legislation is in place in all the countries and the three-cycle structure is already implemented or will be in the very near future. In some of the countries implementation is more or less completed (e.g. **EL, NO** and **NL**). With the introduction of the three-cycle structure most countries have introduced (or are in the process of introducing) a number of complementary measures, like the workload-based European Credit Transfer Systems (ECTS) or at least a credit point system compatible with ECTS, the issuing of a Diploma Supplement and provisions for joint or double degrees, e.g. through the international programmes in Italy. In several countries the Bologna reforms are part of a more far-reaching reform to restructure the higher education system (e.g. the quality reform in **Norway**, the Master Plan for Higher Education in **Slovenia**, the higher education development programme in **Hungary** or the draft plan for higher education development currently prepared by the **Lithuanian** government). Some countries (e.g. **HU, SI** and **SE**) report that the Bologna agenda has triggered profound structural changes or has had a significant impact on developments in higher education.

5.3. Enhancement of competitiveness and attractiveness

Concerning the enhancement of competitiveness and attractiveness, many of the countries refer mainly to measures undertaken to facilitate mobility of incoming as well as of outgoing students and staff. Interestingly, there is frequently more emphasis on attracting foreign students and removing obstacles for them or even providing them with grants than sending more of the national students abroad. Countries thus tend to focus on incoming students and

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[49]   COM (2005) 152 final, published in April 2005.
[50]   The term "universities" is used to mean all higher education institutions.

less on outgoing students. Competitiveness of this kind in combination with tuition fees might indicate (in the medium term) that some countries are keen to keep students at home, while actively trying to attract students from abroad. A few countries (e.g. **FI, FR, DE, IE** and the **UK)** report initiatives that go beyond the issues of mobility such as active marketing and targeted international recruitment activities. For the majority of the other countries which only refer to mobility, targeted international recruitment and marketing appear to remain somewhat less prioritised.

Several national reports mention joint or double degree programmes as an activity lending itself to further enhancing competitiveness and attractiveness. Central and Eastern European countries, in particular, are keen to increase their partnerships with higher education institutions in other countries for the provision of joint degrees and opportunities to attract more foreign students into their countries. Four countries (**CY, LI, LU** and **IS**) report that a high percentage of their students commonly study abroad.

5.4. Promotion of advanced learning and innovation

Most countries make reference to a commitment to raising the percentage of the GDP spent on research and technological development. Quite a few national reports inform about initiatives to establish centres or poles of excellence (e.g. **AT, BE (-fr** and**-nl), DK, FI, FR, IT** and **NO**) or rural knowledge centres within the framework of national innovation strategies (e.g. **IS**). In particular, many of the Central and Eastern European countries use funds from the European Social Fund or other European Structural Funds (e.g. **EE, HU, LT, PL, SI** and **SK**) to establish such centres of excellence, to promote lifelong learning or to attract post-doctoral students to stay in the universities or in innovation centres.

National innovation strategies also frequently include an increased emphasis on strengthening university/industry collaboration and knowledge transfer. **Finland** has launched a comprehensive national innovation system stimulating collaborative relations between producers of knowledge (e.g. universities and polytechnics, research institutes and businesses) and users of knowledge (e.g. businesses and industry, private citizens, policy-makers and administrators), which has led to a substantial increase in private funding of research and development. Several countries provide special funds for the support of start-ups, spin-offs, incubators, science parks etc (e.g. **ES, LT, SI** and the **UK**). A ten-year framework for science and research in the UK includes plans to increase spending on research in both the private and pubic sectors. **Sweden** also plans to increase spending on research in both the private and public sectors and universities are required to cooperate with the surrounding environment, in-company incubators are funded jointly by the Swedish Agency for Innovation Systems and the State owned Technology Transfer Foundations. A few national reports also mention particular activities to provide opportunities to post-docs and integrate them in innovation activities (e.g. **ES**).

A number of national reports mention reforms in doctoral education and training to reduce the time it takes to obtain the degree and provide more structure for this level of qualification. The preferred measure is the establishment of formal doctoral programmes or (post-) graduate schools. **Austria** has initiated doctoral programmes, whereas the Netherlands has established a Research Masters programme. **Finland** established a graduate school system in 1995 to make postgraduate education more systematic, improve the quality of research and further national and international cooperation in education and research. **Estonia** is also setting up graduate schools and a similar initiative in **France** focuses on international co-supervision of doctoral students. However, apart from a few exceptions, the reforms of doctoral training are

mainly seen in the context of the Bologna reforms (consolidating the third cycle), while innovation strategies and strengthening collaboration between enterprises and academia are seen as a separate exercise. Exceptions are where "professional doctorates" are established and also when reforms in doctoral training are linked to regional development.

In **Ireland** there is a high level of investment in research and development by creating new centres and research programmes, by improving labour market skills of researchers, by creating new opportunities for university-industry research collaboration and by financially assisting higher education institutions to enhance and develop their research capabilities. In order to support these activities, a Chief Science Advisor has been appointed by the government.

Three countries make specific reference to increasing the number of maths, science and technology graduates (**HU**, **NO** and **DE)**. In **Germany** there is a specific policy to attract more women to science and technology using mentoring programmes.

5.5. Promotion of structural changes at universities

The reports focus primarily on the introduction of new and more managerial forms of institutional governance. Quite a number of countries have introduced various forms of contractualisation to regulate the relationships between higher education institutions and the State as well as a basis for internal resource allocation. In **Austria, Denmark** and **Iceland** the autonomy of universities has been increased, and multi-annual agreements and budgets have been introduced in **Austria**, and multi-annual agreements between the universities and the national authorities in **Iceland**. In **Germany** and **Austria** performance-related funding has been introduced based on an agreement on objectives and in **Portugal** it takes into consideration the performance of the higher education institutions. In the **Czech Republic** the changes have involved introducing administrative boards, which is also the case in **Slovakia** where in addition the universities have been granted a new status of non-profit public bodies. Reform of the status of universities is in the planning stages in **Lithuania** and the **French** report underlines the need for an evolution of governance, organisation, regulations and financing. However, there are still countries in which institutional autonomy has only been granted partially by the State. Nevertheless, performance contracts are frequent and appear to be becoming more widespread.

Some of the Central and Eastern European countries are still faced with challenges related to a relatively fragmented nature of the university sector. Recent legislation in Slovakia is redressing this problem, though some fragmentation will persist due to a number of small universities, so that new forms of institutional management can take effect. The general trend seem to be to include more external stakeholders into the new institutional governance regimes through the composition of university boards (e.g. **AT**) or involving unions, students and employers in the higher education reform processes (e.g. **HR)**. **Slovenia** has adopted a very comprehensive reform of legislation besides a number of measures to improve teaching performance.

One of the priorities put forward in the Commission's Communication "Mobilising the brainpower in Europe" is that extensive training will be necessary in order to enable university managers to plan and manage change in a strategic way. None of the reports, however, deal with this aspect of promoting structural changes.

5.6.   Quality assurance and accreditation

Practically all countries have either extended existing quality and accreditation agencies or have established such agencies where they did not exist before. Quite a few countries emphasize that higher education institutions are obliged to set up their own internal quality assurance procedures, which may be monitored or audited periodically by an external body (e.g. **AT, DE**, **DK, EL, FI, IE, IS, NL** and the **UK).** External agencies and bodies responsible for accreditation and evaluation have also been set up and/or developed in a number of countries (e.g. **AT, BE** (**-fr** and **–nl**)**, BG, CY, CZ, DK, EE, ES, FI, HR, HU, IE, LT, NL, NO, PL, SI,** and the **UK). Belgium-fl** and the **Netherlands** have set up a bilateral accreditation agency (NVAO) in order to develop transnational recognition of quality evaluation and accreditation decisions.

There is frequent reference to the European Network on Quality Assurance (ENQA) standards, which were adopted politically by the Ministers at the Bergen Conference in May 2005 and are in the process of being adopted as a formal recommendation within the EU. As a rule accreditation and evaluation refer to programmes and/or disciplines/departments. Institutional accreditation and evaluation is clearly less frequent and in some countries it tends to be restricted to private higher education institutions. In some countries (e.g. in **DK, HU** and **NL**) a new study programme has to be accredited by the responsible agency and approved by the Ministry responsible for higher education.

Standards and procedures for ministerial approval are generally very similar; however two different approaches can be identified. In some countries (e.g. the **Nordic countries**, **EL, IE, NL** and the **UK)** higher education institutions develop their own internal quality assurance systems, which are audited or evaluated by an independent external body or agency. In other countries a national committee or agency or body develops quality standards and criteria against which an institution or a programme will be assessed (e.g. **CZ, HU, LT, LV** and **SK**).

5.7.   Provision of lifelong learning and access for 'non-traditional' students

In many countries widening the provision of lifelong learning and access to higher education is an important policy thrust, be it by providing financial support for non-traditional students, i.e. those from low socio-economic backgrounds and with other disadvantages, as well as taking the first steps towards the recognition and validation of prior learning and work experiences. There are specific examples of countries, which have policies to increase participation and access (e.g. **IE** and **NO),** where there are financial measures to help students. The study entitlement funding system in the **Netherlands** has similar objectives and also aims to make the system more demand-driven. Recent legislation on higher education in **Slovenia** pays special attention to lifelong learning by providing institutions with the necessary flexibility to organise non-formal learning programmes, develop criteria for recognition and increase participation.

Access for non-typical students is being widened in many countries. Firstly, it is done through establishing systems for the recognition and validation of prior learning and experience (e.g. **BE-fl, BG, DK, EE, ES, FI, FR, NL, NO** and the **UK**). Secondly, in most countries higher education institutions offer provisions for continuing education and training (whether for degree programmes or diplomas) as for example in **Malta** or in Slovakia where lifelong learning centres have been established within universities. Thirdly, open universities are being established on the basis of distance learning and using ICT-based learning (e.g. **CY**, **EE**, **EL,**

ES, FI, LT and **NL).** In addition, distance and blended learning is being developed by higher education institutions (e.g. **AT, BG, FR, IS, LT, SE** and the **UK)**.

A few countries also report on a variety of measures to create flexible learning pathways and to create closer links between post-secondary vocational education, continuing professional education and higher education. The aim is to create more permeability between different learning paths and implement procedures for validation and recognition of prior learning (formal as well as informal). The **UK** is building cooperation networks between training providers, the further education and higher education sectors. In **Hungary** students can gain credits from a vocational training programme, which count towards a degree. A different type of initiative for non-typical students are the Third Age Universities, e.g. in **Malta, Slovakia, Slovenia** and the **Czech Republic. Poland, Lithuania, Estonia** and **Slovenia** are using the structural funds for developing provision for non-traditional learners.

5.8.   Technological partnerships and cooperation with enterprises

The communication from the Commission "Mobilising the brainpower in Europe" calls on Member States to ensure that fiscal rules enable and encourage partnerships between business and universities in order for universities to be able to attract a much higher share of funding from industry through partnerships in which both sides find an interest.

Most countries emphasize a commitment to strengthening cooperation and collaboration between higher education and industry. Technological partnerships and closer cooperation between higher education institutions and industry or enterprises are regarded as a basic requirement for innovation and increased competitiveness. A range of quite varied measures and initiatives support this perspective. **Spain** allows universities to collaborate with private or public bodies. In **Denmark** legislation has addressed the issues of intellectual property rights and technology transfer. National agencies, which focus on knowledge transfer, partnerships, support for applied research and technological development, have been set up in a number of countries (e.g. **IE** and **RO). Sweden** has also set up a national Agency for Innovation Systems, which provides funding for incubators in collaboration with the Technology Transfer Foundations. Similarly initiatives led by individual ministries in **Slovenia** are supporting the improvement of links between higher education institutions and enterprises, applied research projects, involving industry co-funding, promoting entrepreneurship, etc.

Countries which seem to have developed a coherent and comprehensive approach on this issue (e.g. **AT, IE, LT, NO, PT, SI, SE** and the **UK**) frequently report on financial support for science parks, incubators, start-ups and spin-offs as well as the encouragement and support of more applied research. Technology transfer centres in universities in **Germany** and government programmes support start-ups around the universities and emphasis is placed on the utilisation of research results.

For certain countries this area is identified as either a problem or a challenge (e.g. **EE, LV, RO** and **TR**). In **Estonia** and **Portugal,** where it was estimated that there were not enough specialists in science and technology, the challenge has been taken up and measures have been introduced to increase the popularity of those subjects in education. In **Portugal** for example, science and promotion of information became one of the priorities with a considerable amount being allocated to research and development grants and projects.

Five countries deal with university-industry cooperation within the framework of regional (rather than national) development. Thus Regional Development Boards have been set up in **Hungary** while in **Estonia, Poland** and **Slovakia** the Structural Funds contribute to supporting cooperation between higher education and employers, regional innovation strategies and knowledge transfer. In the **Netherlands** links between universities and regional industry are encouraged for applied research and teaching.

The **Austrian** Association for Research Promotion explicitly supports cooperation between higher education and industry and not just basic research. This is complemented by a variety of government-funded programmes to support technological partnerships for innovation and development and the policy to increase the Research and Development capacity of *Fachhochschulen*. In **Portugal** there are innovation centres in enterprises with the possibility of involving academics.

5.9. Maths, Science and Technology

The EU benchmark for the total number of graduates in mathematics, science and technology (MST) has been set to increase by at least 15% by 2010 with, at the same time, a decrease in the gender imbalance. Reaching the benchmark implies an increase of about 100,000 graduates, from 650,600 in 2000 to 748,000 in 2010. The most recent data available[51] suggests that the benchmark is likely to be more than achieved as most of the progress required had already been achieved by 2003 when there were about 745,000 graduates in maths, science and technology in the EU-25. However the overall figure covers a broad range of situations. It should be noted that in 2001 the proportion of MST graduates was higher in the EU (24%) than in the USA (17%) or Japan (22%).

Concerning the gender imbalance in the EU 25, the share of female students increased from 30% in 2000 to 31% in 2003. The share of women increased in **Estonia, Cyprus, Latvia, Romania** and **Slovakia** by more than 4 % from 2000 to 2003.

5.10. Conclusions

Current higher education reforms in all countries are focused on introducing the three-cycle structure of degrees. Most countries have also introduced a number of complementary measures, like the European Credit Transfer Systems (ECTS) or at least a credit point system compatible with ECTS, the issuing of a Diploma Supplement and provisions for joint or double degrees. Within the higher education sector these structural reforms of the Bologna agenda are clearly more in the foreground than the more policy-related reforms concerning funding, governance and the role of universities in society and the economy that are at the core of the higher education and research strands of the Lisbon strategy. This can be illustrated by doctoral education and training which tends to be regarded as part of the Bologna reforms (i.e. the third cycle) rather than as part of a strategy for more competitiveness and innovation as is the focus in the Lisbon strategy. It was suggested that the within the Bologna Process, the ministerial meetings every two years set clearly identifiable steps for moving forward, while the relationship between the issues of higher education, the labour market, employment policies, research and development, and the issue of competitiveness is complex and the process of attuning these issues is lengthy and thus takes a long time.

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[51] Source: Eurostat, Structural Indicators site (August 2005), http://epp.eurostat.cec.eu.int.

Regional differences within Europe are becoming more visible reflecting the developmental level of the higher education systems and resulting problems and challenges. For example, serious under-funding is still one of the major problems of higher education in Central and Eastern Europe while issues of governmental steering of higher education seem to be more in the foreground in some of the Southern European countries.

Following the Bologna reforms, quite a few countries are reforming their higher education quality assurance systems, often in the framework of establishing new evaluation and accreditation bodies or extending their responsibilities where they exist already. ENQA are important guidelines which were adopted politically by the Ministers at the Bergen Conference in May 2005 and are in the process of being adopted as a formal recommendation within the EU.

In many of the countries issues of relevance of research and knowledge transfer, collaboration with industry as well as institutional management reforms are on the agenda (though with varying importance). Still it is notable that some of the major issues referred to in the communication from the European Commission "Mobilising the brainpower in Europe" are being taken up. Quite a number of the national reports mention that there is a commitment to raise the percentage of the GDP spent on research and development (not always up to 3 percent as agreed in the Lisbon strategy). But with a few exceptions no country report mentions concrete measures and initiatives to achieve this. Additional investment is supposed to come from the private sector. In most of the national reports making the commitment to increase spending on Research and Development there is an underlying assumption that some of this will be geared towards university research but there is little explicit commitment reported to raise higher education funding as such.

Concerning the provision of lifelong learning and access for non-traditional students in universities, the necessary provision is in place in many countries and the vast majority of universities offer continuing professional development. In many countries widening participation, providing financial support for students from low socio-economic backgrounds (and with other disadvantages), as well as developing the recognition and validation of prior learning and work experiences are important policy aims. Access to non-typical students is also being developed through open universities, distance and blended learning; creating flexible learning paths; and creating closer links between post-secondary vocational education and continuing professional education.

6.   INCREASING THE QUALITY AND ATTRACTIVENESS OF VOCATIONAL EDUCATION AND TRAINING

The conclusions to the Maastricht Conference on 15 December 2004, emphasising the achievements of VET systems in Europe, also underlined the urgency for national authorities to put in place lifelong learning strategies by 2006 with the priorities and objectives outlined in the Maastricht communiqué[52] as a key element. In that perspective the communiqué underlined the importance of continuing the modernisation of VET systems to increase their attractiveness, to become increasingly demand-led, of high quality and relevant. It equally emphasised the new demands on VET brought by new jobs and profiles. Earlier in 2004, the

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[52]   http://europa.eu.int/comm/education/news/ip/docs/maastricht_com_en.pdf.

Joint Interim Report[53] had identified a number of levers and priorities for key areas and recommended that reforms and investment focus on the image and attractiveness of VET.

The Maastricht communiqué agreed by the Ministers responsible for Vocational Education and Training of 32 countries, the European Social partners and the European Commission reaffirmed the above priorities setting an agenda for reform at national level to strengthen the contribution of VET systems (institutions, enterprise and social partners) to lifelong learning. For the first time, it introduced priorities to be tackled at national level, including the use of the common instruments, references and principles developed at European level, improving investment, the further development of VET systems to meet the requirements of people at risk, the development and implementation of open learning approaches, the increased relevance and quality of VET, the further development of learning-conducive environments and the continuing competence development of teachers and trainers in VET. These priorities are the framework against which this cross-country analysis of progress and challenges has been undertaken.

6.1. **Implementation at national level of the tools developed under the Copenhagen process**

The Copenhagen declaration of 2002[54] identified four priorities to enable VET to play an active role in developing lifelong learning policies and in supplying the highly skilled workforce necessary to reach the Lisbon goals. They were: strengthening the European dimension; improving transparency, information and guidance systems; recognising competences and qualifications; and promoting quality assurance. Since then substantial progress has been made and at European level (see section 8.4.5.) there are now several instruments: the Ploteus portal on European learning opportunities; the single Community framework for achieving the transparency of qualifications and competences-Europass (see Section 7.1); common principles for the validation of non-formal and informal learning; a proposal for a European credit transfer system for VET (ECVET); a common quality assurance framework (CQAF) and a draft European Qualifications Framework (EQF) with its reference levels, defined by learning outcomes, which encompass the diversity of VET qualifications.

The cross-country analysis examined the implementation of these instruments and tools at national level. At this stage it is not yet possible to infer the actual implementation, however, as the reports generally state that it is at too early a stage for there to be any concrete results. It is nevertheless clear from the reports that countries have established their own priorities for implementation amongst the Copenhagen instruments.

Quality is placed at the top of the agenda in implementing the Copenhagen Process in a number of national reports (e.g. **AT, BE** (**-nl** and **fr), HU, LT, LU, NL, NO** and **SK**). In particular the Common Quality Assurance Framework (CQAF) is specifically mentioned by some countries such as the **Netherlands** where it will be implemented in 2005 and **Spain** where legislation is in place. The common principles are an integral part of Provider's Quality

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53   COM(2003) 685 final

54   Declaration of the Ministers with responsibility for vocational education and training and of the Commission meeting in Copenhagen on 29-30 November 2002 and concerning enhanced European cooperation in the area of vocational education and training, http://europa.eu.int/comm/education/copenhagen/index_en.html. It is based on a Resolution of the Education Council of 19 December 2002 on the same subject (OJ C 013 of 18 January 2003).

Assurance in **Ireland**, while in **Belgium-nl** the inspectorate has integrated them into the regular school audit tool. Similarly in **Finland** the CQAF has been used in developing the Finnish quality control criteria for VET providers. Phare funding is being used in **Romania** to put in place the CQAF for VET in schools while in **Lithuania** Quality Assurance for VET is being developed as an element of the Single Planning Document (SPD)[55].

In the national reports quality is often associated with the common principles for the validation of non-formal and informal learning as well as with reinforcing counselling and guidance. Some countries (e.g. **IS, IE, PT, NO** and **DK)** prioritise the implementation of the common principles for validation of non-formal and informal learning within the Copenhagen agenda**.** According to the inventory undertaken about the validation methods used for non-formal and informal learning, there is already an important body of expertise in many of the old Member States. Guidance and counselling were highlighted by **Finland, Germany, Lithuania, Norway, Spain** and **Sweden**. **Norway** is implementing a framework for guidance and in **Lithuania** this is also a development aspect in the Single Planning Documents (SPD). In **Germany**, mobility is also a priority and recent legislation establishes the basis for promoting a period of mobility for vocational training.

Some new Member States and candidate countries report that developing a National Qualifications Framework (NQF) is a high priority for them within the Copenhagen Agenda. They are: **Croatia,** the **Czech Republic, Cyprus, Estonia, Iceland, Latvia, Malta, Poland, Romania, Slovenia** and **Turkey**. Such an approach tends to involve a thorough review of the system and in their reports the countries refer to reforms which include the general development of a NQF, the revision of professional qualifications or of their structure, the establishment of an awarding or accreditation body, improving the involvement of stakeholders, reviewing the design of qualification standards, creating modules, building a database, the creation of schools career advisors and of a distance education counselling function.

6.2. Increasing participation in VET through improving its image and attractiveness

The Maastricht agenda puts a high level of priority on improving the image and attractiveness of the vocational route for employers and individuals in order to increase participation in VET. The challenge for the European countries is to "maintain and improve the quality of initial VET, to make provision attractive to stakeholders and client groups and to provide flexible linkages between pathways and with general and higher education"[56].

In the national reports, which tend to focus on the formal education and training systems, the policies and measures described to enhance the image and the attractiveness of VET depend partly on whether VET already has a positive image. In countries in which VET is described as having a positive image, policy efforts tend to aim at strengthening the links between initial VET in upper secondary vocational schools and higher education whereas in other countries policies tend to focus on improving the initial VET system. **Austria,** the **Czech Republic** and **Finland** report that VET has a strong, positive image in their countries explained by the tradition of a dual system, or the possibility of obtaining a dual qualification (of general and vocational education) as well as by measures to support access to higher education. In the

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[55] Single Planning Documents define the strategy for the use of structural funds in Objective 1 countries.
[56] Maastricht Study, 'Achieving the Lisbon goal: The contribution of VET', 2004.
http://www.europa.eu.int/comm/education/policies/2010/studies/maastrichtexe_en.pdf

same way, the **German** report notes that the 2005 Reform of the law on vocational training seeks to bring further improvements to a vocational training system that is already effective. The types of policies and measures reported which aim to improve the image and the attractiveness of VET tend to be common to a number of countries and may have been embedded in some of the European systems for many years. Since the reports focus on new policies, change and progress the examples are illustrative and do not aim to provide an exhaustive presentation of such policies.

Two main approaches are described in the reports. They are:

-        Policies concerning VET: reforms of the structure, the curricula, links with enterprises and the development of guidance and counselling.

-        Improving access to higher education and to general secondary education.

6.2.1.   Policies concerning VET: reforms of the structure, the curricula, links with enterprises and the development of guidance and counselling.

The table below provides an overview of the reported policies and measures aimed at improving the infrastructures and funding (including individual costs); to strengthen pathways and reduce obstacles to transfers; to improve the curricula and create flexibility in delivery; and to improve teacher training. Examples are given in the table below:

Improving the structures, infrastructures and funding	**Latvia**: Increase in national and regional funding for the infrastructure, equipment and to establish a network of institutions.
	Malta: Merging VET provision into the Malta College of Arts, Science and Technology.
	Slovakia: More focus on internal differentiation and individualisation of education, improving the quality of education and training and extension of the scope of VET.
	Iceland, **Malta**: financial support for VET students.
	Croatia: Restructuring of the education system under preparation.
	Bulgaria: Creation of externally moderated exams; licensing of training centres.
	Norway: Restructuring of study programmes in VET.
	Greece: Implementation of a National network linking VET with the needs of the labour market.
	Luxembourg: Reform of teacher training for VET putting the emphasis on adapted and differentiated teaching methods to suit the public, including adult learners.
	Hungary: The development of new training modules, a competence-based vocational training structure and a system of accreditation, assessment and validation of formal, non-formal and informal learning with the support of the ESF.
	Sweden: Planned introduction of a modern system of apprenticeship including workplace training at upper secondary level as an alternative to vocationally-oriented programmes in

	schools.
	Turkey: Establishing better links between VET and the labour market, establishing partnerships with industries and NGO's, improving the curriculum and restructuring secondary education based on ISCED.
Strengthening pathways and reducing obstacles to transfers	**Belgium-nl:** Major updates of the curriculum to remove barriers between general secondary education.
	Germany: Aims to improve the interface between general education and vocational training by incorporating "qualification modules" into vocational preparation targeted especially for young people experiencing difficulties at school.
	Romania: Two pathways have been created towards the upper secondary qualification.
	Spain: Different pathways to the same qualifications have been introduced.
	Liechtenstein: Raising the status of VET by creating an additional training course (*Berufsmatura*), that provides access to higher education.
	Portugal: Substantial updates of the curriculum allowing for an easier permeability between primary and secondary education and initial VET pathways, reinforcing the modular structure of programmes and reinforcing qualifications at ISCED level 2, 3 and 4 and vocational qualifications at level 1-4.
	Norway: Giving pupils in lower secondary education opportunity to get acquainted with programmes in VET.
Improving the curricula and create flexibility in delivery	**Cyprus**: Curriculum reform includes increased use of ICTs.
	Iceland: Flexibility has been increased; awards are credit-based taking account of work experience.
	Germany: Recent legislation promotes transnational mobility by allowing periods of vocational training courses to be completed abroad (up to one-quarter).
Improving teacher training	**Belgium-nl:** development of in service teacher training.
	Malta: Specific in-service training for VET lecturers
	Norway: Overall strategy for the development of teachers' and trainers' qualifications.
	The **UK**: Reforms, to be fully implemented by September 2007, to improve the quality of teacher/trainer training for the Learning of Skills sector leading to revised qualifications for both new and experienced teachers.
Other measures	**Finland:** Has launched a "Year of vocational skills"
	Turkey: Setting in place a database to follow the destinations of VET graduates.

Additionally, it should be noted that the Maastricht study (which included questionnaires completed by the Directors General for Vocational Training for 31 countries), described several other measures designed to increase flexibility, which countries had reported as important elements in increasing the attractiveness of VET.

Modularisation, national qualification frameworks and competence-based programmes were all highlighted by a large number of countries.

The table below gives an overview of the reported policy measures to increase links with industry, which include strengthening links with the stakeholders and social partners and building direct links with enterprises.

Strengthening links with the stakeholders and social partners	**Romania**: Development of partnerships and increase of the participation of social partners in planning and validating qualifications and to correlate learning with the needs of work.
	Liechtenstein: Two working groups: a) the Chamber of Trade aiming to improve the attractiveness of apprenticeships in industry and b) the Chamber of Commerce aiming to promote attractive training places in industry
	Sweden: Since 2004 the Vocational Education Commission has been developing cooperation between education and working life. It brings together representatives of business, trade unions, trade organisations, training providers, and government agencies.
	Hungary: The development of Regional Integrated Vocational Training Centres envisages total reform of the institutional structure, the concentration of resources and capacities and strengthening the regional scope and links with the labour market (through for example the advisory boards).
Building direct links with enterprises	**Denmark**: Focus on Individual Training Programmes developed in relationship with enterprises.
	Malta: Tailor-made courses are provided to deal with emerging labour market needs.
	Germany: Increasing the number of apprentice places[57].
	Italy and **Portugal**: Support for apprenticeship and alternance between school/work.
	Slovakia: Measures linked to attracting foreign investments
	Luxembourg: Sectoral initiatives with the Professional Chamber to improve the image of VET.
	Belgium-fr: Coaching of young workers by older workers has been developed.
	Norway: Tripartite cooperation in VET, organised in Councils appointed by sectors, with focus on increasing the number of apprentice places and local partnerships agreements.
	The **UK**: Increasing support to employers in up-skilling their workforce through National Employer Training Programme; improving partnerships between employers and providers through Sector Skills Councils and Skill Academies; developing the Apprenticeship programme.

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[57]   In Germany the Government and employers' associations agreed in 2004 upon a Memorandum of Understanding *("Nationalen Pakt für Ausbildung und Fachkräftenachwuchs in Deutschland")*, which includes a commitment of the employers to increase the number of apprentice places in enterprises by 30,000 per annum until 2007.

	The Netherlands: The planning of courses will no longer be organised nationally, but regionally. Vocational education institutions will be able to decide with regional industry what courses the region needs.
	Sweden: Recently introduced post-secondary VET, the Advanced Vocational Education, is based on close cooperation with business and one third of the training is in enterprises – Learning in Working Life.

Many countries mentioned the improvement of their guidance and counselling systems as a significant contribution to improving the attractiveness of VET (**BE-fr, CY, CZ, DE, DK** (in the case of special educational needs), **FR, LT, MT, NO, PL** and the **UK**) but little detail is provided. The 2005 law on vocational training in Germany will extend cooperation among the *Länder* concerning vocational guidance and preparing students for choosing an occupation (in conjunction with the Federal Agency for Employment).

6.2.2.   Improving access to higher education and to general secondary education

Improving access to higher education for VET students is an important aspect of increasing the attractiveness of VET. In addition to the countries in which progression from VET into higher education is already well-established, for example, **Cyprus,** the **Czech Republic, France, Iceland, Ireland,** the **Netherlands** and the **UK,** policies of this type are reported by a number of countries and focus on progression into higher education and also on reducing barriers which create obstacles to progression into general secondary education and/or higher education. A number of policies and measures are presented below.

Widening access to higher education	**Austria**: Implementing measures to increase access to higher education including after apprenticeship.
	Spain: Established open criteria for access to higher education.
	Iceland: Creation of technological higher education under discussion.
Improving pathways to higher education	**Italy**: Will give equal status to the two tracks – general and vocational.
	Netherlands: Adopted a flexible admission policy for students who have completed the third level of secondary vocational education but do not have standard requirements.
	Slovenia: Introduction of two upper secondary diplomas (one for general education and one for vocational).
	Spain: Increased the different pathways to the same diploma.
	Lithuania: Technological secondary schools have been established.
	Lichtenstein: Creation of the *berufsmatura*.
	Croatia: An exam at the end of vocational secondary school is being created to prepare VET students to take entrance exams for higher education.
Facilitating transfers between vocational and general secondary education	**Estonia:** In basic and secondary schools, possibilities to acquire vocational skills (pre-vocational training) have been broadened.
	Germany: Linkages between vocational and general education

	are being strengthened by developing vocational modules.
	Belgium-nl: "Accent op Talent" is a pilot project support by the government in which schools can innovate by removing barriers between general secondary education and VET.
	Iceland: Removing barriers for transfers between general education and initial VET
	Netherlands: Abolished regulations penalising students transferring from one course of study to another to create scope for more flexible pathways from secondary vocational to higher professional education.
	Norway Policy to raise the level of attainment at the end of upper secondary education for both young people and adults to improve progression.

Though in most of the countries, improving the opportunities for VET students to progress into higher education is considered as having a positive impact on the attractiveness of VET, the **Hungarian** report suggests that opening up access to higher education may have negative consequences for the VET tracks as it attracts secondary level VET students into academic studies in higher education rather than continuing with a vocational/technical pathway.

6.3. The needs of low skilled and disadvantaged groups

As the European Commissioner, Jan Figel', reminded the Maastricht Conference in December 2004, there are nearly 80 million low skilled citizens in Europe at serious risk of social exclusion[58]. The Maastricht Study underlines a positive correlation between countries in which the VET route is strong (50% or more students in vocational programmes at ISCED 3) and a lower level of early school leavers. The Maastricht Communiqué[59] set a priority for the further development of VET systems to meet the needs of people or groups at risk of labour market and social exclusion and suggested that it should be based on a combination of targeted investment, assessment of prior learning and tailored training and learning provision.

It is clear from the reports that a large majority of the countries express concerns with the needs of low skilled citizens and disadvantaged groups. Different policy approaches are reported by the countries. One focuses on specific "target groups", a second is mainly centred on the education system and a third is closer to a lifelong learning strategy in so far as it encompasses groups of all ages, with low socio-economic status and/or low educational attainment. However as there is a lack of information on the non-formal and informal sectors, it is difficult to assess the full range of measures in all the countries.

Putting a high priority on policies and measures concentrating on targeted populations is widespread and is reported by many countries (e.g. **AT, BE-nl, BG, CY, CZ, DE, EE, ES, FI, FR, HR, HU, IT, LI, LT, LU, LV, MT, NO, PL, PT, RO, SE, SK** and the **UK**). The groups targeted vary depending on the country but are mainly the following groups: migrants, refugees, Roma, people in prison, older workers, and people with special educational needs.

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[58]   'Vocational education and training – key to the future, Lisbon-Copenhagen-Maastricht: mobilising for 2010', Cedefop synthesis of the Maastricht study, Luxembourg, 2004.

[59]   Maastricht Conference on strengthening European cooperation in vocational education and training, 15 December 2004.

There are also individualised learning programmes as well as programmes to improve levels of literacy.

A second approach to raising the skills of low skilled groups is implemented by some countries through the formal education and training provision using "second chance" initiatives. In **Ireland** there is a commitment to improve and expand adult education services under which the State will offer a Second Chance Guarantee. A Back to Education Initiative offering flexible part time learning opportunities to adults with less than upper secondary level education is being implemented. The **Netherlands** is seeking to decrease early school leaving by proposing a "back to school or work and school" scheme. Both these initiatives focus essentially on young people whereas in **Estonia**, **Malta**, **Romania** and **Slovenia** adults have access to primary and secondary education and certificates. Again the focus is on young people in **Iceland** where the emphasis is being placed on ensuring a robust transition from compulsory to upper secondary education for students who have low levels of achievement. The **UK** Skills and Skills For Life strategies are centred on raising the skills levels of the lower-skilled population. In **Sweden** the individualised study programmes provide individual study paths for students who cannot enter national programmes. They combine compulsory or upper secondary education with workplace training. The improvement of guidance and counselling is reported by **Finland** and **Liechtenstein**, while **Belgium-fr** has improved the coordination of training providers. In **Norway** adults have a legal right to upper secondary education and evaluation of non-formal and informal competences.

Integrated approaches were reported by **Austria** where the policy for tackling the needs of the low skilled and disadvantaged groups explicitly includes older as well as young people, and also by **Denmark** where substantial extra funding is being allocated towards all groups with low level skills from the young to 64 years old. Part of the approach in **Belgium-nl** includes training teachers to work with groups from a low socio-economic background.

6.4. Older workers – the role of VET

In VET, policies and measures to develop and update the skills and competences of older workers are not sufficiently widespread. The situation described in the national reports is identical to that in the report "Achieving the Lisbon goal: the contribution of VET" presented at the Maastricht Conference in December 2004. As the report states the situation for older workers shows very little progress and "the trend is indeed worrying". One of the major ways to contribute to improving the situation consists in developing policies and practices for the validation of non-formal and informal learning. Another is through the participation of older workers in formal education (schools, universities, etc.), which is one way in which the formal VET system addresses the needs of older workers.

Some countries report that policies already being implemented are continuing. This is the case in **Austria, Cyprus,** the **Czech Republic, Lithuania** and **Slovakia** where access to continuing vocational training is being improved. Since 2000 in **Bulgaria** it has been possible for older workers to take State recognised diplomas and there is a "Third Age University" in the **Czech Republic** and in **Malta**. Several countries report that they are beginning to introduce procedures for validating prior learning and experience. Thus, in **France** after 20 years of work experience, workers can apply to have a *Bilan de competences* and a priority has been set for the validation of non formal learning for the over 45s. In **Greece** provision has been established for the certification of vocational skills. **Romania, Slovenia** and **Spain** report that measures are being introduced for the validation of non-formal learning for older workers. In **Poland** there are measures to support business start-ups.

In order to achieve the Lisbon goals and to develop robust strategies for lifelong learning, this aspect will certainly require more consideration and to be made a higher priority. More than half of the countries did not report any measures or policies for older workers. Though some have already achieved the employment rate target for the 55 to 64 year olds (for example **DK, PT, SE,** and the **UK)** or are well above it (**IS** 79%), most are still below it. Improving and or developing policies for the validation of non formal and informal learning is one way forward which could contribute to raising the qualification levels of older workers, as such procedures are likely to be more attractive to them than more traditional forms of learning.

6.5.   Improving the links of VET with the labour market and the anticipation of qualification needs

Linking VET with the labour market requirements of the knowledge economy for a highly skilled workforce is one of the key areas on which the Joint Interim Report recommended that reforms and investment be focused. The Maastricht Communiqué further emphasised the importance of increasing the relevance and quality of VET through the involvement of all key partners at national, regional and local levels as well as need for paying greater attention to the early identification of skills needs. This section presents the progress made in these areas, as reported by the countries. The responses highlight a range of approaches to improving the links of VET with the labour market and the anticipation of qualification needs. They include making changes to the education and training structure, developing relationships with enterprises and reviewing the occupational, competence and/or education standards as well as funding measures (See section 3 on this latter point). In most of the countries there is an ongoing process of review and adaptation.

Similarly, the reports suggest that institutional autonomy is increasing, usually developed in conjunction with increased decentralisation, and in particular with increasing the role of the regions, which has implications for regional and local labour markets. The Maastricht Study noted that decentralisation is a major trend in the governance of initial VET institutions[60]. Five countries reported on having implemented such policies: **Germany** (because of its federal system[61]**), Lithuania, Spain, Slovakia** and **Turkey**.

6.5.1.   Improvement in the structure of VET and its links with the labour market

Reforming and improving the structure of VET, as well as links with the labour market, the social partners and other stakeholders is of core concern for a large majority of countries (e.g. **AT, CY, CZ, DE, DK, ES, FI, FR, IE, IS, LI, NO, PT, SE** and the **UK**). Initiatives in this area are also starting in **Croatia, Estonia, Greece, Latvia, Slovakia** and **Turkey**.

Some countries report the establishment of specific types of education institutions in response to a labour market need (for example the technical/vocational post-secondary institutions in **Croatia** and **Cyprus**) or on building a network of VET institutions, which will work closely with labour market, needs (e.g. **Latvia**). Similarly in the **Czech Republic,** the analysis of employers' requirements is being linked to curriculum design.

Several countries either have well-established mechanisms for involving the social partners in the creation and updating of diplomas and certificates and/or the development of curricula (e.g. **FI, FR** and **IS**) or have recently set them up. This is the case in **Romania** where a

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[60]   Op. cit.
[61]   The scope of recent reforms in Germany covers the three policy approaches.

tripartite agreement has been signed to establish permanent Sectoral Committees responsible for validating and steering the qualification processes. **Estonia** is also increasing the involvement of the social partners at all levels from ministry to schools and **Lithuania** has established Industry Lead bodies. In this respect the **Netherlands** and **Iceland** have a special position because schools and social partners are both responsible and have the official competence to identify and plan VET and its relationships to the labour market. Two countries report on the establishment of agencies or councils to link VET with the needs of employment and the private sector (**EL** and **TR**).

A different approach to taking account of the needs of the labour market concerns the validation of non-formal and informal learning. Good progress or even well-established structures are noted for twelve countries (e.g. **AT, CZ, DK, ES, FI**, **FR, IE, IS, NO, PT, SE** and the **UK).**

6.5.2. *Measures in favour of work placements*

The reports for **Austria** and **Belgium (-fr** and**-nl)** mention the development of work placements for students either in secondary provision or, in **Austria**, in higher education. Increasing the number of students undertaking apprenticeships or training by *alternance* is mentioned for example by **France, Portugal, Sweden, Italy** and **Denmark** as contributing to better links with the labour market as the purpose in all cases is to better take account of enterprise needs. These measures, which are in addition to the existing forms of apprenticeship in the countries concerned, are implemented in the formal initial education and training sector.

6.5.3. *Revision of standards*

A further approach to improving the links of VET to the labour market is through the development or revision of occupational and/or competence standards. In **Portugal**, for example this is taking place a sectoral basis. **Belgium-nl** reports on revising both the standards for VET and the curricula, while in **Slovenia** and **Hungary** substantial work is being undertaken on the national professional standards as a foundation for new qualifications. The reports mentioned this particular aspect because it reinforces the relationships with the social partners. The high level of synergy involved when there is a detailed dialogue over the creation or revision of standards is likely to create strong relations and linkages among the different partners involved in the process. In the ongoing reforms of primary and secondary education in **Norway** the Social Partners are involved in the development of new competences and curricula in line with labour market needs.

6.5.4. *Early identification of skills needs and planning for VET provision*

The two main challenges presented by ten countries, which reported on the need for early identification of skills needs for planning VET provision, were increasing the involvement of the stakeholders and improving data collection. They were reported by **Austria,** the **Czech Republic, Finland, France, Germany, Slovenia** (in an earlier stage of development), **Iceland, Luxembourg, Spain** and **Liechtenstein**. An innovative approach to labour market information was presented by **Austria**-the "qualification barometer" which is a private sector information survey undertaken about expected vocational qualifications**.** Another example is the *FreQueNz network* in **Germany** which is a research network sponsored by the German Federal Ministry of Education and Research. It comprises various institutions which contribute to the early identification of qualification needs. Its activities also entail the

development, implementation and operation of an electronic platform. It contributed to setting up an international network on early identification of skill needs (Skillsnet) at Cedefop.

Effective early identification of skills needs is a challenge for vocational education and training which is difficult, complex, costly and of longstanding. Dedicating resources to skills anticipation can also appear to compete with other reform needs, as for example mentioned in the national report on **Poland**. Increasing the diversity of the stakeholders involved could provide a way of increasing the resources, as is taking place in **Austria** (see above). According to the reports, new Member States and candidate countries foresee the implementation of measures to improve the early identification of skills needs through specific projects. Thus in **Estonia** the process will include planning for student places while in **Bulgaria, Lithuania** and **Slovakia** will focus on employer needs. In **Bulgaria** the work is undertaken through the Phare programme and in **Croatia** through a programme entitled CARDS.

6.6. Professional Development of Vocational Teachers and Trainers

The Maastricht communiqué emphasises the continuing competence development of teachers and trainers in VET reflecting their specific learning needs and changing role as a consequence of the development of VET. This priority is further developed in the "Progress towards the Lisbon objectives in Education and Training" (2005)[62], which develops three main messages for improving the quality of teachers and trainers (in both general education and VET). The first concerns the need for motivating teachers of whom a large proportion in Europe are over the age of 50, to undertake continuing professional development. The second underlines the variation in the pupil-teacher ratios and the third concerns the need for a high level of recruitment from 2005 to 2015 to replace teachers who will retire. According to the Maastricht report a key problem for vocational teachers and trainers is the relatively low social and economic status enjoyed by their profession, despite the fact that it is essential for supporting the skills development of the workforce. Added to this, VET teachers are an ageing profession and may attract comparatively low salaries. The report also drew attention to the increasing diversity of the range of profiles needed, given the diversification of training in the workplace.

Though mandatory requirements have been introduced in many European countries for continuing training for VET teachers, the challenge remains developing recruitment and training policies, which can attract individuals from different backgrounds. High quality initial and continuing teacher training are fundamental challenges both for the development of a lifelong learning strategy and to the increase the attractiveness of VET.

The national reports express the same concerns. One third of them reported that changes have been introduced into the curriculum for teacher training for VET, establishing closer links with professionals, developing new standards and broadening the curriculum. **Austria,** the **Netherlands, Norway, Sweden** and the **UK** report on establishing closer links with professions, social partners and stakeholders within a framework of decentralisation and devoting more attention to the learner and the learning process. **Sweden,** for example, is promoting the responsibility of teachers as mentors and is developing their responsibility in individually-centred programmes. In **Norway** the competence development of trainers is a part of a new overall strategy on teachers and trainers.

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[62]   SEC (2005) 419 of 22 March 2005.

New standards for teacher training and training modules are being developed in some countries, (e.g. in **EE, HR** (as a project), **LT, RO,** the **UK),** while **Belgium-nl, Portugal** and the **UK** report on developing a broader curriculum to include ICT. In certain new Member States **(CY, LT, SK** and **SI)** and three candidate countries **(BG, HR** and **RO)** initiatives undertaken to reform VET teacher training are funded through EU programmes such as Phare and CARDS and through the European Social Fund monies. Continuing professional development for VET teachers is not mentioned in many of the national reports, except by **France** and **Spain** and also by **Malta** where there is in-service training for technical lecturers coming into teaching from industry and also specific training for qualified teachers on teaching adults. In **Finland** several continuing education projects for vocational teachers are underway and firm emphasis is placed on the education for VET teachers, which consists of a higher education programme (university or polytechnic) plus three years of work experience. The *TUKEVA* and *KOKEVA* Programmes are aiming to raise the level of education among VET teachers in particular. *TUKEVA* involves 450 teachers who are studying for a university degree and *KOKEVA* concerns initial vocational education and training and is addressing 700 teachers and 86 organisations.

A major challenge will be increasing access to education, training and re-training for trainers since though measures are being taken by public authorities as far as VET teachers are concerned, the training and retraining of trainers does not appear to be well developed. The reports refer to some interesting initiatives such as the establishment of a Teacher Council **(Ireland)**, the proposed register of Qualified Teacher Learning and Skills in **England,** the Development Programme for Vocational Training Schools in **Hungary** and the creation of an occupation of "adult trainer" in **Luxembourg**. The **Netherlands** is developing a market-oriented system whereby the education and training institutions will purchase teacher training. In **Norway** an important measure concerns special training that is being established for members of the Examination Boards to develop a "culture of assessment". Such policies, programmes and initiatives help to increase the attractiveness of the profession and enhance the quality of the teaching and learning environment for all.

6.7.   Conclusions

The implementation of the instruments and tools developed under the Copenhagen process is at too early a stage for countries to be able to present concrete results but countries have established priorities for implementation at national level.

In most countries improving the attractiveness of VET is a key concern and a range of policies and measures are being actively implemented to improve the infrastructures and funding, to put in place or consolidate pathways and reduce obstacles to transfers from one type of provision to another, to modernise the curricula and create flexibility in its delivery and to adapt teacher training. A second crucial approach, which is receiving substantial attention concerns strengthening links with the stakeholders, social partners and enterprises. Guidance and counselling systems are undergoing development in some countries, but this issue still needs more concerted attention.

It is clear from the reports that a large majority of the countries express concerns with the needs of low-skilled citizens and disadvantaged groups and are implementing a range of policy approaches. However there is a lack of information on the non-formal and informal sectors, which makes it difficult to assess the full range of measures in all the countries. The European Inventory on validation of non-formal learning should help alleviate this problem.

The participation of older workers in training is not showing marked improvements. However an increasing number of countries are putting in place measures for the validation of prior learning and experience and for non-formal and informal learning. In order to achieve the Lisbon goals in this respect, more consideration and a higher priority level will be necessary.

Increasing the relevance of VET by reforming and improving the links of VET with the labour market, the social partners and other stakeholders is of core concern for a large majority of countries. In most of the countries there is an ongoing process of reviewing and adapting procedures and structures, which includes setting up tripartite or sectoral mechanisms to underpin the process of developing and updating qualifications.

The early identification of skills and needs raises challenges for vocational education and training which are difficult, complex, costly and of longstanding. Overall the reports do not provide sufficient information to make it possible to determine the extent to which countries are developing mechanisms for anticipating skills shortages, gaps and deficiencies.

In relation to the major challenge of increasing the access to training and professional development for VET professionals, measures which are being taken for VET teachers should be adapted and extended to trainers who currently seem to be the group most in need of attention.

7. CONSOLIDATING THE EUROPEAN DIMENSION OF EDUCATION AND TRAINING

7.1. Increase mobility through removing obstacles and active promotion

The 2004 Joint Interim Report underlined that promoting mobility was a key priority for future action, in particular in relation to the concrete implementation of the European Parliament and Council recommendation of 2001[63]. The Interim Report noted that administrative and legal obstacles persisted in the recognition of competences and qualifications as well as taking into account teacher mobility as part of professional development. The 2004 national reports sent as part of the implementation of the Recommendation on mobility illustrated the efforts undertaken by countries to promote mobility, including the removal of administrative or legal obstacles. However, only certain Member States had clearly defined strategies for mobility or coordination structures. The analysis of the 2005 national reports on Education and Training 2010 suggest that the situation has not significantly improved.

The signing of the Bologna Declaration in 1999 by EU Member States and other European countries can be regarded as a firm commitment to facilitating international mobility of university students. Subsequently, at the end of 2002, the Copenhagen Declaration on enhanced cooperation in European vocational education and training was signed by a similar number of countries.

In recent years, the improvement of professional and personal skills through international mobility has increasingly been considered as a starting point for building a Europe of Knowledge expected to emerge as the strength of Europe in a global economy. International mobility in education is regarded as one of the key elements of the Lisbon agenda.

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[63] Recommendation of the European Parliament and the Council of 10 July 2001 on 'Mobility within the Community of students, persons undergoing training, volunteers and teachers and trainers'.

The single Community framework for achieving the transparency of qualifications and competences by means of the creation of a personal, coordinated portfolio known as Europass was established by decision of the Parliament and the Council in December 2004[64]. The implementation of the Europass Decision is proceeding well: National Europass Centres have been appointed in all EUR-28 countries and are all in operation. For most of them the agreement entered into force on the 1st of May 2005. The different Europass documents (i.e. the Europass-Mobility, the Europass-CV, the Certificate Supplement, the Diploma Supplement and the Europass-Language Portfolio) are being distributed in most countries. Promotion of the framework at national level is beginning.

A study on mobility carried out for the European Parliament in 2005 concluded that with respect to the recognition of study abroad in tertiary education, ECTS and the Diploma Supplement are being widely implemented. In tertiary education, there are no significant obstacles to the recognition of study achievements abroad and foreign degrees for students who want to go on studying at a university in the EU. However, obstacles remain with respect to the recognition of vocational education. The Certificate Supplement has only been implemented in a minority of Member States so far, and the European credit system for VET (ECVET) is still under development. No European activities in the field of recognition can be reported for secondary education[65].

The study also noted that in recent years, a particularly large number of measures have been undertaken such as the removal of language and cultural obstacles, the improvement of financial support for mobile students, the removal of legal and administrative obstacles, as well as information, marketing and improving the transparency of education systems. Less attention has been given at the national level to activities concerning: the provision of financial means for education institutions, the promotion of curricular integration between study programmes of national and foreign education institutions, and non-financial support of mobile students (i.e. advisory services and other measures)[66].

7.1.1. *Mobility in Higher Education*

According to the national reports, countries implement a range of measures to address administrative and legal obstacles to mobility in higher education. Legislation and arrangements on funding are used as levers to promote mobility and simplifying immigration and/or residence legislation are also important factors (e.g. **FI, NL, PT** and **SK**). Mobility funds or grants are available at national, programme and institutional levels (e.g. **BE, IT** and **SE**). State mobility grant schemes have been launched in some countries (e.g. **AT**, **DE, EE**, **EL**, **ES, MT, PL** and **SI)**. In **Cyprus** Government grants are given to all national students, whether they study in Cyprus or abroad. Others have allocated top-up grants to students taking part of their studies abroad (e.g. **AT**, **EE**, **FR**, **IS, MT** and **NO)** and **Austria** has exempted university students in mobility programmes from tuition fees. Incentives are sometimes given directly at institutional level (e.g. **DK** and **NO**). Transferability of grants between institutions and between EU countries facilitates outward mobility (e.g. **DK**, **FI**, **FR**

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[64] Decision No. 2241/2004/EC of the European Parliament and of the Council of 15 December 2004 on 'A single Community framework for the transparency of qualifications and competences (Europass)'.

[65] 'Student Mobility in Secondary and Tertiary Level Education and in Vocational Training – NATMOB', Ute Lanzendorf (University of Kassel/WZ1) and Jake Murdoch (EIESP), (2005), study carried out for the European Parliament, DG for Internal Policies of the Union, Directorate B.

[66] Ibid.

and **IE**) while grants to incoming foreign students are given by a few countries (e.g. **DK**, **IE**, **NL, NO** and **SI**).

Some countries cited setting up accreditation agencies (e.g. **NL** and **SK**) as measures linked to the development of mobility. This process of recognition may exist mainly with one or two countries (e.g. **Liechtenstein** with **Austria** and **Switzerland** due to shared frontiers and language). Some countries report measures to develop an integrated, national policy on the recognition of international awards (e.g. **FR** and **IE**).

The introduction and implementation of ECTS and the Diploma Supplement is contributing to mobility. Another type of measure to increase mobility is establishing joint programmes and diplomas (e.g. **BE** (**-fr** and **–nl**)**, FI** and **HR**).

In addition to National Agencies and NARIC/ENIC Offices, some countries have set up international offices, in charge of information and promotion of the EU dimension (e.g. **IS**, **PL** and **HR**). In Ireland a national approach to the recognition of International Awards for employment as well as academic purposes has been developed, led by the National Qualifications Authority of Ireland (NQAI*). This provides a one-stop shop for recognition queries and information. In some cases, mobility is based on existing national bilateral and exchange programmes (e.g. **HU**, **LI**, **AT** and **MT**) and mobility schemes are organised in the framework of EU programmes or of programmes focusing on regions of Europe (e.g. CEEPUS in **PL**, regional cooperation with other Nordic countries in **SE**). Periods of study abroad or placements in foreign universities are sometimes an integrated part of a student degree programme (e.g. **LU** and **NO**).

Measures to reduce obstacles, such as language and cultural preparation programmes for incoming and outgoing students, have been introduced at national level (e.g. **HU, NO** and **SE)**, by National Agencies (e.g. in **IS**) or at institutional level (e.g. in **EE** and **PL**). Programmes taught in foreign languages (particularly in English) have been developed in order to increase access to a wider range of degree programmes for foreign students (e.g. **NO, FI, IS** and **HU.**) In some countries, courses are offered at universities in two or three different languages (e.g. **LU,** and **MT)**.

7.1.2.   Mobility within primary and secondary education including virtual mobility

Measures in the primary and secondary education sectors are mainly focused on improving ICT equipment and skills (e.g. **EE**) and internet networks *(*e.g. **EL** and **NL** through the Associated Schools Project Network and **HU** through the Sulinet Programme*)*. The majority of exchanges are in the framework of school twinning programmes (e.g. **CY** and **EL**) or the European programmes. In **Lithuania**, the Europass Language Passport has been adapted for secondary school pupils (16-19). The Nordic Council of Ministers has launched the Nordplus Junior Programme encouraging mobility at upper secondary school level. In **Sweden** bilateral programmes are available for upper-secondary studies in other EU countries such as **Austria, France, Germany** and **Spain**.

7.1.3.   Quality of mobility

A first approach to improving the quality of mobility tends to be the dissemination of information about other countries, education systems, foreign qualifications, the recognition of qualification with a view to pursuing studies in another country, etc. (e.g. web-based information services in **FR** and the **UK).** The second approach involves different types of

assessment activities: *a priori* assessment of students' applications according to their academic performance and foreign language ability in order to select students for mobility programmes (e.g. **EL** and **LV**); and *a posteriori* assessment with the development of a European quality label for outstanding projects and mobility activities (e.g. the "E-Quality" dissemination project and "Socrates quality label" in **AT**). Online tools for participation in E-Quality are now being disseminated to all the Socrates national agencies. The **Czech Republic** gives a certificate of quality under the Leonardo da Vinci programme. Assessment or information dissemination activities are mostly undertaken by specific agencies that have been set up to promote and improve mobility.

According to the NATMOB Study[67], "Measures which were characterised as particularly effective for increasing the overall participation in mobility, the participation of traditionally non-mobile students and the quality of mobility, concerned above all the areas of recognition, information, marketing and transparency of education systems, financial and non-financial support for mobile students, and the removal of language barriers". The study added that this latter area "was assessed as particularly important for ensuring the quality of mobility". It also stated that "guidance for foreign students could be further expanded", because it has "a positive effect on increasing the number of incoming students and the quality of study periods of incoming students".

7.1.4. *Policies aimed at increasing the mobility of teachers and trainers*

In relation to the conclusions about student mobility and concerning the mobility of teachers and trainers, it seems that outgoing teacher mobility is more developed than incoming (contrary to trends reported for student mobility, see Section 5). According to the information in the national reports, it also seems that mobility as part of in-service training for teachers or trainers is more developed than for student teachers.

All the countries support the mobility of teachers or trainers through EU programmes though some also report national, bilateral, trans-national or inter-institutional mobility measures (e.g. **AT, CY, DE, EL, HU, IE, NO** and **SE**) and inter-institutional projects were reported by **France**. The **UK** has a number of nationally funded programmes with countries within Europe and beyond. The scope of the mobility activities is broad. It concerns the development of innovative pedagogy, the content of the courses, study visits, "post to post" exchanges and the improvement of language capacities.

Some countries have implemented mandatory measures in order to include the learning from mobility in the professional development of teachers/trainers, with periods of study and teaching abroad for trainee teachers and for in-service training (e.g. **DE, LI, PT, PL, RO** and **SI)**. In **Estonia** state scholarships are provided for degree studies at foreign universities for a new generation of future university teacher trainers. **Finland** has made expert exchanges and in-service training for vocational teachers and trainers a national priority of the mobility projects in the Leonardo Programme. Awareness-raising and information dissemination is also undertaken in **Cyprus** and **Denmark**. Incentives such as a paid leave for EU-funded mobility were also mentioned (e.g. **CY**, **EL, NL** and **FR**).

In the national reports, most information is about outgoing mobility of teachers and trainers. Reciprocal exchanges of staff are the only form of incoming mobility reported.

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[67]   Ibid.

7.1.5. *The promotion of mobility in vocational education and training*

According to the information developed in the national reports, mobility in this field seems to be less developed than for higher education students or teachers.

Almost 300,000 people received a Leonardo da Vinci grant between 2000 and 2005, with the number of participants doubling from 37,000 in 2000 to 68,000 this year[68]. For 2005, it was possible to provide funding for only half of the more than 6,000 project applications for mobility. In 2005, almost half of all beneficiaries (31,000) were young people in initial vocational training spending between three weeks and nine months in a company or vocational training institution in another country. The Leonardo placements fund the highest number of applicants in **Germany** (18% of beneficiaries), **France**, **Italy** and **Spain** (10% applicants for each) for the same period. **Poland**, the **UK** and the **Netherlands** accounted for between 5% and 6% of the total. The 25 other European Countries represented less than 10,000 students each in the Leonardo da Vinci programme over the 5 year period.

Mobility in VET seems to be principally supported by the Leonardo da Vinci programme but also by Socrates, the Euregio Programme and YOUTH. Countries have also developed specific national measures (e.g. **DE**, **FR**) and some bilateral programmes have also been launched (e.g.: **LI**, **NL, RO, NO** and **DE**). The **UK** has excluded Leonardo placements from National Minimum Wage legislation, which might otherwise act as a deterrent to potential host organisations. Some countries underline the importance of developing ECVET (**AT**, **BG**, **DK**, and **TR**) though some transnational agreements of this type already exist such as the 2004 agreement on the general comparability of VET qualifications between **France** and **Germany**, which will be extended to **Austria**. **Germany** has also promoted and recognised periods abroad as part of the vocational training (up to a quarter of the training period). In **Sweden** the Government has allocated funds to enable upper-secondary pupils to undertake workplace training abroad.

7.1.6. *Conclusions*

In general, countries have yet to develop coherent and coordinated national strategies for mobility in education and training. Some countries, however, have developed a national approach to the recognition of foreign awards for employment as well as for academic purposes. EU programmes are often the starting point of mobility and are usually the first step preceding the implementation of national measures to develop mobility, except in the countries where national bilateral and exchange programmes exist traditionally, especially in the few countries where bilingualism is quite common.

According to the national reports, the following areas appear to be of major importance as development issues in order to improve mobility: implementation of ECTS, the Diploma Supplement, Joint programmes and Diplomas (rather than the promotion of curricular integration between study programmes of national and foreign institutions), transparency and the recognition of foreign qualifications in higher education with a view to pursuing studies in another country, the development of information and marketing, raising national mobility funds or top-up grants for students, and the transferability of grants.

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[68]   This section is based on data provided on placements funded under the Leonardo da Vinci programmes (European Commission, IP/05/885, 2005).

The countries are facing three main challenges. The first one is that even though they are developing language and cultural preparation or programmes taught in a foreign language, removing language barriers remains an issue. There is still a lot to do to improve the situation and increase inward and outward mobility. The second issue is that non-financial support, such as advisory services to outgoing students and specific guidance for foreign students also need to be improved. Thirdly, VET mobility, ECVET and the mobility of student teachers and trainers are still in an early stage of development.

7.2. European Dimension in national curricula

The Barcelona European Council and the 2004 Joint Interim report of the Council and the Commission both called for the enhancing of the European dimension in education and training. Within the framework of the implementation of the Education and Training 2010 work programme, a sub-group of the Working Group B on key competences was set up to examine how the European dimension could be brought into the eight domains of key competences. The sub-group has contributed to a revision of the framework for key competences adding a specific European dimension to three of the eight key competences agreed: social and interpersonal competences, civic competence and cultural awareness. It is closely related to democratic citizenship and the aim is to provide a smooth transition from local, regional and national frameworks to the European level, leading finally to a perception of being a world citizen[69]. There is an emphasis on the fact that these are areas best learned through practice and from a learning environment that respects diversity, as well as the richness of cultures and languages. The above notions were embodied in the report from **Belgium-nl** which stated that the aim of education for citizenship is "to teach young people to become critical citizens who are prepared and competent to think and act constructively in a democratic State as it functions today in the international community".

7.2.1. Main measures and policies to encourage a European dimension, including in the curriculum at primary and secondary level

(i)   The European dimension in the curriculum

Several national reports explicitly state that the European dimension is embedded in the curriculum of the country (e.g. **AT, DE**, **EE, ES, FI, LU, NL, PO, PT** and **SE)**. Some countries have either included Europeanisation and internationalisation in recent the legislative reforms or in policy documents (e.g. **BE-fr, ES, IE** and **LI**) and other reports refer to policy papers on enhanced internationalisation (e.g. **DK, NO** and the **UK)** with the focus either on raising awareness of the importance of mobility and cooperation for teachers and education counsellors or on the pupils in terms of their understanding of the world they live in. Enlargement is specifically the subject of the European dimension in one country, **Latvia**, where *"pupils must be able to argue their opinion on Latvian integration into the EU and NATO as well as to understand the motives for this integration."*

Several countries (e.g. **BG, EE, EL, IE, IS, LU, LV, MT** and **SK)** cite particular subjects as the vehicle for the European dimension in their schools. The subjects most commonly mentioned are: history, geography, citizenship education or civics, cultures of minorities and social studies. However the reports were too succinct to include more detailed information on

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[69]   'Implementation of Education and Training 2010 work programme', Progress Report from Working Group B on Key Competences, November 2004.

what is meant by including the European dimension in these subjects. Interpretation of the European dimension is broad, going from teaching about Europe and the EU to developing multi-cultural elements in the curriculum (e.g. **AT, CY)**. The **UK** has published an International Strategy entitled "Putting the World into World-Class Education". The recently introduced approach in **Italy** is through a project on education for Europe aiming at integration between the European and national dimensions of education policies. Reports mention very few courses that focus specifically on the European dimension, except in **Malta, Slovakia** and **Romania**

Despite clear progress in embedding a European dimension in the curriculum in some countries, it should be noted that there is little sign so far that all pupils leave secondary education with the knowledge and competences they will need as European citizens, as requested by the 2004 Joint Interim Report.

(ii)   Primary schools

Belgium (**-fr** and **–nl), Poland** and **Portugal** mention the European dimension in the primary school curriculum. **Spain** mentions provisions to include citizenship education in the curriculum with a European dimension to encourage the acquisition of coexistence and mutual respect. In other countries it is limited to teaching foreign languages (e.g. in **DE, IE, NO** and the **UK**). In **Ireland**, the European dimension of education is developed through the Social Personal and Health Education and the History and Geography aspects of the curriculum. In addition, as part of a national action plan on racism, guidelines for teachers on the whole school approach to interculturalism have been published. Similar guidelines will shortly be published for post primary schools.

(iii)   Secondary schools

Some measures are specific to secondary schools. In **Poland** the European dimension is integrated in the curriculum. **Spain** mentions provisions to include citizenship education in the curriculum. **Ireland** and the **UK (England)** emphasise citizenship education with a European dimension at secondary school level. In **Ireland** the European dimension is promoted through the continuation of the programmes at primary level for Social Personal and Health Education and History and Geography allied with a mandatory Civic Social and Political Education programme up to completion of lower secondary level education. **France** reports that the diplomas obtained by students in the special European classes in which pupils have more intensive language learning, will include information about the European dimension of the course.

(iv)   Activities in the wider school context

In some countries schools participate in a range of European campaigns and activities such as the European label for innovation projects in language teaching and learning (**AT**), European clubs (**CY** and **PT**) and Europe in School (**LU**) etc. but no information is given on how these initiatives contribute to the European dimension in practice. One exception is the **Belgium-fr** report which stated that the European Year of Citizenship had been used to encourage a new platform for discussion in schools. Another specific initiative was that of the **UK** government which is sponsoring an International School Award to reward schools that have successfully integrated international awareness into their curriculum.

(v)   The role of EU programmes

The implementation of the EU programmes in schools was reported as having positive effects on the development of a European Dimension (e.g. **AT, CZ, DK, IE, LV, LT, LU, MT, SE, SK** and the **UK).** Furthermore, it is known from evaluations of the Socrates programmes[70], for example, that the European dimension is interpreted by educational institutions in a broad and multi-faceted manner. Definitions include cultivating the idea of European citizenship, taking Europe into many different types of schools, teaching subjects from both the national and European perspectives, developing teaching and learning modules that support internationalisation, being able to communicate in a second language, etc. However, the national reports do not provide further information on how they interpret the European dimension.

(vi)   Language learning

Countries are dealing with foreign language learning from very different starting positions. Thus in **Luxembourg** some of the teaching is in French and German as well as in Luxembourgish and in **Malta** the report states that is common for students to speak three languages.

Some countries emphasise the importance of learning languages as part of the European dimension in education but the information tends to be quantitative concerning the number of languages taught, rather than the learning outcomes. The Barcelona European Council in 2002 called for "the mastery of basic skills, in particular by teaching at least two foreign languages from a very early age". The working group set up on language learning in 2003 stressed that "improving language learning in Europe was a key factor in the Lisbon strategy" and essential to improve mobility. However, substantial improvements would need to be made to reach the objective of a minimum of two foreign languages per pupil. Associated issues concern the range of languages proposed to pupils since 46% of pupils in primary education and 91% in general secondary education are taught English as a foreign language. The on-going development of a language competence indicator following the Barcelona European Council will also to make it possible to chart not just the teaching of languages but also language competence (i.e. the learning outcomes).

The countries that explicitly stated in their country report that pupils learn two (or more) foreign languages either at secondary level or from primary school upwards, in all or some schools, are **Belgium-nl, Iceland, Malta,** the **Netherlands, Norway, Portugal, Romania** and **Turkey**, which does not imply that it is not the case in other countries. The 2005 Commission Staff Working Paper entitled "Progress towards the Lisbon Objectives in education and training"[71]   lists the countries in which two or more foreign languages are taught (e.g. **BE, CZ, DK, EE, FI, FR, IS, LU, MT, SE, SI** and **SK**). In **Greece, Hungary Poland** and **Slovakia** measures are being introduced to extend foreign languages in the curriculum. In the **Netherlands**, the policy of internationalising primary and secondary education will continue with the promotion of bilingual education, strengthening language teaching and introducing it at an earlier stage. The **UK** reports that it is developing language strategies that will offer a broader range of languages than at present and extending the provision for primary school pupils. In **Sweden** a Government proposal is under way proposing a new access system to

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[70]   Socrates 2000 Evaluation Study, available on
http://www.europa.eu.int/comm/education/programmes/evaluation/global_en.html.
[71]   Commission Staff Working Paper of March 2005, "Progress towards the Lisbon objectives in education and training" SEC (2005) 419.

universities and university colleges in order to stimulate studies of foreign languages in upper secondary schools.

7.2.2.   Teacher education and support to teachers

In two new Member States there is evidence of concerted efforts to introduce a European Dimension at systemic level. Thus in **Estonia** the aim of promoting mutual understanding and cooperation among people living in Estonia within the broader EU context, applies to teacher training as well as to the curriculum. In the **Czech Republic** the Centre for European Studies is developing modules for teacher training introducing the European dimension. Only a few countries mention measures to include the European Dimension in teacher training. They range from government subsidies for special training sessions on current developments in the EU (**BE-nl**), to modules on socio-cultural knowledge in (**BE-fr**) and support for the European dimension in **Portugal** and **Romania**.

Very little information is provided on in-service teacher training, except for special programmes in **Hungary** on EU integration, and the **Slovakian** report emphasises the need to improve foreign language knowledge of teachers through in-service training. In **Ireland** teachers are encouraged to do training abroad if they are in Comenius projects.

Support to teachers comes in the form of grants for visiting teachers and for the purchase of materials (**IE**), training packages and materials, e.g. the *PuntoEdu Europa* (**IT**), the "European Navigator" which is a bank of knowledge on European history (**LU**). This type of information is also being developed in **Latvia**. One country reported on a conference on European issues that is being organised for teachers for the autumn of 2005 (**NO**). In some countries schools are provided with guidelines, e.g. in the **UK** there is guidance for schools on the delivery of citizenship education. On-line support is mentioned, e.g. Global Gateway in **England** which is a website to link up schools with partners abroad. The stated objective is that by 2010 every school in **England** should have established a sustainable partnership with another school overseas.

7.2.3.   Conclusions

About one-quarter of the countries' reports explicitly state that the European dimension is embedded in the curriculum of the country and some countries have either included Europeanisation and internationalisation in recent legislative reforms or in policy documents.

The subjects most commonly cited as the vehicles for teaching the European dimension are history, geography, citizenship education or civics, cultures of minorities and social studies. However, there is little sign so far that all pupils leave secondary education with the knowledge and competences they will need as European citizens, as requested by the 2004 Joint Interim Report.

Some of the national reports specifically mention the implementation of the EU programmes in schools as being positive for the development of a European dimension but no further information is provided on how they interpret it.

About one-quarter of the countries report on the integration of the European dimension in initial and/or continuing teacher training. In some countries teachers receive support in the form of guidelines, conferences, materials, etc.

The importance of learning languages is underlined as part of the European dimension in education but the information tends to be quantitative, concerning the number of languages taught, rather than the learning outcomes.

8. EU IMPLEMENTATION OF THE EDUCATION AND TRAINING 2010 WORK PROGRAMME SINCE THE 2004 JOINT INTERIM REPORT

8.1. Introduction

The 2004 Joint Interim Report of the Council and the Commission took stock of progress made on the implementation of the Lisbon strategy in the fields of education and training and set the overall strategic direction for the work programme in 2005-6. It confirmed the validity of the objectives set for education and training systems in 2001[72] as well as the detailed work programme which followed[73] and identified the priority levers for future action[74], which should be given immediate priority. The Joint Interim Report thus stressed the urgency of reform of education and training systems at national level.

The Joint Interim Report also called for the incorporation of actions at European level relating to vocational education and training (follow-up of the Copenhagen process)[75], lifelong learning (follow-up to the Council Resolution)[76] and mobility (implementation of the Mobility Recommendation and Action Plan)[77]. The Education and Training 2010 work programme should also take into account the outcomes of the Bologna process and thus cover all systems and levels of education and training in a lifelong learning perspective.

The Joint Interim Report emphasised that such an integrated approach would have important consequences for the future management of the work programme. In particular it would require a more effective and efficient implementation, making best use of the open method of coordination, rationalising methods and enhancing synergy. In this context the Joint Interim Report called for small groups of countries to be enabled to work together on issues of common interest and stressed that the impact and the visibility of the process would depend on the level of consistency between the different initiatives and working methods. It also called for a strengthening of cooperation and monitoring of progress and agreed upon a biennial joint reporting to the European Council.

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[72] Education Council report to the European Council on the *"Concrete future objectives of education and training systems"* (doc. 5980/01), http://register.consilium.eu.int/pdf/en/01/st05/05980f1.pdf. The report was approved by the Stockholm European Council on 23-24 March 2001.

[73] Detailed work programme on the follow-up of the objectives of education and Europe (OJ C 142 of 14.6.2002), http://ue.eu.int/newsroom/related.asp?BID=75andGRP=4280andLANG=1. The work programme was approved by the European Council in Barcelona on 15-16 March 2002.

[74] The three priority levers are: 1) Focus reform and investment on key areas of the knowledge-based society; 2) Make lifelong learning a concrete reality; and 3) Establish a Europe of Education and Training.

[75] Declaration of the Ministers with responsibility for vocational education and training and of the Commission meeting in Copenhagen on 29-30 November 2002 and concerning enhanced European cooperation in the area of vocational education and training, http://europa.eu.int/comm/education/copenhagen/index_en.html. It is based on a Resolution of the Education Council of 19 December 2002 on the same subject (OJ C 013 of 18 January 2003).

[76] Council Resolution of 27.06.2002 on lifelong learning, OJ C 163 of 9 July 2002.

[77] Recommendation of 10 July 2001 of the European Parliament and of the Council on the *'Mobility within the Community of students, people in training, volunteers, teachers and trainers'* (OJ L 215 of 9 August 2001) and the Action plan for mobility (OJ C 371 of 23 December 2000).

This section of the staff working paper takes stock of the progress made at EU level to date since the 2004 Joint Interim Report in achieving concrete outcomes at European level and thus provides an update of the 2003 Commission Staff Working Paper covering the first two years of implementation of the Education and Training 2010 work programme[78].

8.2. Education and Training and the mid-term review of the Lisbon strategy

The position of education and training at European level, following the 2005 mid-term review of the Lisbon strategy, has been further enhanced. The European Council, at its meeting in March 2005, continued to underline the importance of developing human capital as Europe's main asset, and as a crucial element of the Lisbon strategy, and called for the implementation of lifelong learning as a *sine qua non* to achieve the Lisbon objectives.

The mid-term review called for a strong 'Partnership for European Renewal' aimed at enabling the Member States, the European Union and the Social Partners to work together towards the same aim. Work on growth and jobs will spearhead this new partnership. To ensure delivery, a streamlined 3-year coordination cycle will now be set in train, based on an integrated guidelines package for jobs and growth, national and EU Lisbon Action Programmes, and a single progress report to the European Council. The integrated guidelines for jobs and growth includes two guidelines for education and training (guideline number 23 and 24), which reflect the priorities of the Education and Training 2010 work programme, focussing on the need to expand and improve investment in human capital, and to adapt education and training systems to new competence requirements.

The European Council and the Commission have both emphasised the need for the full continuation of the Education and Training 2010 work programme as a major contribution to the Lisbon strategy, and more generally as the means by which Member States will achieve the broad common objectives they have fixed for their education and training systems. Education and training will therefore keep its separate two-yearly reporting mechanism allowing the sector to maintain the momentum created by the Lisbon strategy and to have the proper means to pursue the efforts and achievements already accomplished during the first phase of the work programme. This reporting process is complementary to, and nourishes the new Lisbon integrated reporting cycle, including the implementation of the Youth Pact, in close cooperation with the employment, social inclusion, youth and research sectors.

8.3. Transition from the first to the second phase of the work programme

On the basis of the above mentioned priorities and the results achieved in the first phase of implementation of the Education and Training 2010 work programme, the process is now moving to the next stage. The aim of the next stage is to make sure that Community support to the implementation of the work programme at the national level, including the use of the common tools, references and principles, will be more concrete and closer to participating countries' priority areas for reform. A strong emphasis will be placed throughout on supporting the implementation of lifelong learning strategies by 2006 in all countries. A major aspect of the work programme also involves the further development of a European area of education and training, which includes the European Qualifications Framework (see point 8.4.1), as well as other tools supporting EU cooperation and mobility.

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[78]   Commission Staff Working Paper of 11 November 2003 on *'Implementation of the Education and Training 2010 programme'* (COM (2003) 685 final).
http://europa.eu.int/comm/education/policies/2010/doc/staff-work_en.pdf.

Most of the working groups, which were set up over the course of 2001/2002 to produce policy recommendations and/or concrete material to support progress, in relation to the 13 concrete objective areas of the work programme, as well as the Copenhagen process, have completed their mandate (see point 8.4.2). The working groups will not be reconvened in the future except in cases where certain tasks are permanent (notably the standing group on indicators and benchmarks), or yet to be finalised[79].

The diversity of themes and priorities to be addressed during this next stage means that new, flexible working methods are being employed, adapted to the specificities of the Education and Training 2010 work programme. The following paragraphs offer a brief overview of the activities taking place in 2005-6, in order to take forward the mandate of the 2004 Joint Interim Report, including the priorities of the Maastricht Communiqué.

8.3.1.   Strengthening support to implementation at the national level through peer learning

Strengthening the support for the implementation of the Education and Training 2010 work programme at national level means that working methods have to be developed which allow Member States to focus on their specific policy priorities. Clusters[80] of countries have therefore been set up in order to work together in a very practical way on issues of common interest (peer learning activities). The aim is to strengthen mutual learning and deepen the exchange of good practice between countries sharing similar concerns, in order to develop a common understanding of success factors for the improvement of policy-making and the implementation of reform. It should also contribute to the further development of the European area of education and training through enhanced, practical cooperation. Flexibility in the organisation and the sequencing of the activities has been necessary in order to create a dynamic learning process and to manage the practical aspects of the activities. 2005 has therefore been an experimental year where the peer learning methodology has been developed, applied and adapted to the specific needs of the Education and Training 2010 work programme.

The first four clusters were launched in April 2005[81]. The clusters have identified and selected examples of policy and practice, which respond best to the expressed interests and needs of the participating countries, as a basis for organising the on-site peer learning activities. A second wave of clusters is being launched towards the end of 2005[82]. The Cedefop study

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[79]   The aim of this initial work was to identify the priority themes, make an inventory of existing initiatives, to define a preliminary list of indicators for monitoring progress and to secure a much-needed consensus between all interested parties. Most of the working groups also worked in this period on the collection of examples of good practice with regard to policies and strategies implemented in the different countries.

[80]   The word "cluster" is used to mean the regrouping of interested countries around a specific theme, corresponding to their national policy priorities, and on which they have expressed a desire to learn from other interested countries, or to share with others their successful or unsuccessful experiences.

[81]   The first wave of clusters have been established around the following broad themes and specific issues: 1) Achieving the EU benchmark on adult participation in lifelong learning; 2) Teachers and trainers; 3) Making best use of resources; and 4) ICT.

[82]   The clusters of the second wave concerns the following broad themes and specific issues: 1) Achieving the benchmarks on early school leavers, completion rates and literacy; 2) Key competences; 3) Achieving the benchmark on the total number of graduates in maths, science and technology, and in particular the gender imbalance. A fourth cluster on Quality assurance in higher education and vocational education and training has been postponed until 2006 in order to ensure complementarity with the ongoing peer learning activities on quality assurance in vocational education and training, in the context of the Copenhagen process.

visits programme is also being used to support peer learning activities around the priorities of the work programme, particularly relating to the follow-up of the Maastricht Communiqué[83]. Participation in the on-site peer learning activities of social partners and other stakeholders is decided on a case by case basis depending on the theme.

The development of a focussed and relevant programme of peer learning activities in the framework of the new Integrated Programme for Lifelong Learning, and in the light of the experiences throughout 2005, is a priority for the next phase of the implementation of the work programme. Future peer learning activities should, in line with the 2004 Joint Interim Report, concentrate on those areas where reforms are most needed (EU benchmark areas; lifelong learning strategies; ensuring efficient and equitable systems; improving governance and developing learning partnerships; higher education; vocational education and training).

8.3.2.   The creation of the Education and Training 2010 Coordination Group (ETCG)

In response to the request of the 2004 Joint Interim Report, the work programme is becoming more integrated, concrete and focussed. On the other hand it is becoming more diverse, using a wide range of instruments and flexible working methods in order to support Member States' policy priorities and to further develop the European dimension.

In order to support a more efficient and coherent implementation of the work programme, the Commission has set up an Education and Training 2010 Coordination Group (ETCG)[84]. While overall political and strategy issues will continue to be dealt with at Council level, the ETCG will oversee the operational management and implementation, in an integrated way and in a lifelong learning perspective, of the Education and Training 2010 work programme. It will maintain an overview of the process; act as an interface between the national level and the European work programme; act as a sounding board for the outcomes of the various activities held to implement the work programme[85]; and help to facilitate the involvement of relevant stakeholders.

The ETCG has been established in the context of a major streamlining of the implementation of the Education and Training 2010 work programme. The ETCG will ensure that all countries, while they focus their participation in a limited number of clusters, continue to be able to make an input to the overall process. Certain existing bodies such as the Copenhagen Coordination Group and the Lifelong Learning coordinators will be integrated into the ETCG. Given their importance in strengthening political cooperation in the specific areas of higher education and vocational training, the work of the Directors General for Vocational Training (DGVT) and the Directors General for Higher Education (DGHE) should be closely connected with the implementation of the work programme.

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[83]   Not only the Cedefop study visits programme but also the ARION Study Visits are more and more specifically linked to the main themes of the Education and Training 2010 work programme.

[84]   The ETCG will be composed of representatives from ministries responsible both for general education (including higher) and initial and continuing vocational education and training from the 25 Member States and the 7 EEA and candidate countries, and the social partners at European level.

[85]   For example, the outcomes of the clusters/peer learning activities would be fed back to the ETCG. The Coordination group would in this sense act as an interface between the policy level and the various activities organised.

8.3.3. Raising the visibility of the process and the participation of stakeholders

The continued efficacy of the work programme will increasingly depend on the extent to which it drives reform 'on the ground' and consequently on the interest and active participation of all relevant stakeholders. With this in mind, the Commission supports, through an annual restricted call for proposals, the development of national action plans aimed at raising the visibility of the Education and Training 2010 work programme, and at disseminating the results of the work programme at national level.

8.3.4. Monitoring and evaluating the implementation of the work programme

The Council and the Commission have both emphasised the need for the full continuation of the Education and Training 2010 work programme and have decided to maintain a separate two-yearly reporting mechanism based on Member States' contributions on their policy priorities and achievements, reflecting the broad contribution of education and training to the economic and social dimensions of education and training (see also point 8.2). This two-yearly reporting process will feed into the new streamlined Lisbon reporting process at national and at European level, as concerns aspects related to growth and jobs. It is important that national education and training reports to the Commission also provide the concrete material for Member States' national Lisbon action programmes.

The monitoring of progress in implementing the Education and Training 2010 work programme is also supported by a regular report on the use of indicators and benchmarks, allowing the identification of strengths and weaknesses with a view to providing strategic guidance and steering for both short and long term measures within the Education and Training 2010 work programme[86]. On 24 May 2005 the Education Council adopted a set of conclusions on new indicators in education and training, which called for further development of strategies in the indicator areas of efficiency of investment, ICT, mobility, adult education, teachers and trainers, vocational education and training, social inclusion and active citizenship[87]. The conclusions also called for detailed survey proposals for the development of new indicators in the areas of learning-to-learn, language skills and in any other area where new surveys might become relevant.

In order to ensure an adequate follow-up to the 2005 conclusions the Commission was invited to assess progress made towards the establishment of a coherent framework of indicators and benchmarks for following-up on the Lisbon objectives in the area of education and training, including a reconsideration of the suitability of existing indicators used for monitoring progress, and report back to the Education Council no later than the end of 2006. A new research unit on lifelong learning (CRELL), which has been set up at the Joint Research Centre at ISPRA, will assist the Commission in this work. The research unit is expected to be fully operational by the end of 2005.

The work related to the achievement of the five benchmarks, approved by the Council in May 2003, will be continued and strengthened in the next phase of the Education and Training

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[86] The latest update was published in March 2005 as a Commission staff working paper "Progress towards the Lisbon objectives in education and training" SEC (2005) 419.
[87] 2005/C 141/04.

2010 work programme (2005-2006) by the establishment of clusters and the organisation of peer learning activities (see point 8.3.1)[88].

8.4. The state of play in relation to the priority areas of the work programme

The following paragraphs offer a brief overview of the concrete outcomes at European level in 2004-2005 including progress on lifelong learning, the outcomes of the working groups, progress on higher education and progress on vocational education and training.

8.4.1. Progress on lifelong learning policies

The European Council called in March 2005 for the further development of the European Education and Training area, particularly in order to promote occupational and geographic mobility. The development of tools and common references for education and training is essential to support the achievement of this priority. Such common references contribute to developing mutual trust between the key players and encouraging reform.

Substantial progress has been made particularly in the follow-up to the 2002 Copenhagen Declaration, to develop tools which are applicable beyond vocational education and training and have a broad lifelong learning focus – relevant to all levels and dimensions of learning. The following paragraphs offers a brief overview of the concrete outcomes at European level including the European Qualifications Framework (EQF), lifelong guidance, validation of non-formal and informal learning and Europass.

(i) European Qualifications Framework

In this context, a key objective for the coming period will be the development and implementation of a European Qualifications Framework for lifelong learning (EQF)[89].

Following the work of an expert group, the Commission has drafted a consultation document setting out a blueprint of the EQF[90]. The objective of the planned EQF is to create a European framework which will enable qualifications systems at the national and sectoral levels to relate to each other, thus facilitating the transfer and recognition of qualifications held by individual citizens. The introduction of a neutral reference structure based on learning outcomes, and underpinned by common principles such as on quality assurance, will simplify comparison of qualifications and allow for a better match between the supply and demand for knowledge, skills and competences, thus supporting labour market mobility throughout Europe. The core of the EQF will be a set of common reference points referring to learning outcomes and located in a structure of 8 levels.

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[88] The Commission will also support the indicator development and analysis by studies and research projects, for example in the field of investment efficiency, and social inclusion and active citizenship. In addition, the Commission will actively participate in relevant international fora (OECD, UNESCO and other relevant organisations) in order to make use of existing initiatives for developing new indicators.

[89] The EQF will complement other measures at EU-level on vocational education and training, which aims at supporting the European Education and Training area, e.g. the Common Quality Assurance Framework for VET (CQAF), the strategy on sectoral qualifications and the European Credit transfer system for VET (ECVET).

[90] SEC (2005) 957 of 8 July 2005.

The Commission's consultation on the European Qualifications Framework was launched at the informal Education Council meeting in London on 12 July 2005[91]. The responses will be analysed and discussed at a conference in Budapest on 27/28 February 2006. The final content and structure of the European Qualifications Framework will be submitted to the Commission for consideration in 2006 as a Draft Recommendation of the European Parliament and the Council.

(ii)   Lifelong guidance

Work on lifelong guidance has revealed large gaps between policy goals and the capacity of national career guidance systems. The Commission's expert group has developed common aims and principles for guidance and draft reference points for quality assurance and key features of Lifelong Guidance systems (see also point 8.4.2 (ix)). These tools are intended to help Member States improve and modernise their policies and systems through self-assessment and self-development of guidance provision at national, regional and local levels.

The Council Resolution of May 2004 identifies clear priorities[92]. The Resolution invites Member States to examine national guidance provision in the education, training and employment sectors. The Commission's expert group also devised a template for action to support Member States in this process. Additionally, a *Career guidance handbook for policy makers* was published by the OECD and the Commission in December 2004 which provides common principles and other tools to improve services at national, local and company level[93].

The main priorities at the EU-level for guidance over the coming period are supporting the Member States in implementing the Council Resolution, promoting the use of the common aims and principles referred to above, developing necessary new tools and, under the Finnish Presidency in 2006 reviewing Member States' progress in implementation taking into account their Education and Training 2010 national reports.

Peer learning activities may start in the first semester of 2006 and will include groups applying, testing and providing feedback on the common guidance reference tools, and on progress in implementing the Resolution and identifying good examples of policy and practice.

(iii)   Validation of non-formal and informal learning

Validation of non-formal and informal learning is on the agenda of almost all European countries and is seen as a key-factor for realising lifelong learning. A number of European initiatives have been taken to support developments at national level (see also point 8.4.2 (ix)). A set of common European principles for identification and validation of non-formal and informal learning were endorsed by Council Conclusions in May 2004[94]. These principles focus on individual rights to validation, the requirements of providers of validation, the need for transparent procedures and criteria and the importance of systematic quality assurance.

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[91]   The consultation involves the 32 countries participating in the Education and Training 2010 work programme, the European Social Partners, the relevant European associations, NGOs and networks, and the European industry sector associations.

[92]   9286/04 EDUC 109 SOC 234.
http://europa.eu.int:8082/comm/education/policies/2010/doc/resolution2004_en.pdf

[93]   http://www.oecd.org/dataoecd/53/53/34060761.pdf.

[94]   9175/04 EDUC 101 SOC 220.
http://europa.eu.int/comm/education/policies/2010/doc/validation2004_en.pdf.

Acknowledging that validation has come to play an important role in enterprises and sectors, the Council invited social partners to contribute to take an active part in the further development of these principles.

A European Inventory on validation of non-formal and informal learning has been set up to support the implementation of the common principles and to promote mutual learning between European countries. This inventory covers the experience of 30 countries, a wide range of industry and service sectors as well as a variety of voluntary organisations. This inventory is available via the EAC web-site (as well as the web site of Cedefop and ECOTEC). In addition to this, the Virtual community of Cedefop on non-formal learning has proved to be instrumental in the development of the common principles and in supporting the compilation of the Inventory. This Virtual community has now close to 1000 active members, thus providing a strong basis for cooperation among experts in this particular field.

It is anticipated that the common principles, the Inventory and the Virtual Community will provide the basis for peer learning activities in 2006.

(iv)   Europass

Following adoption of the Decision of the European Parliament and the Council of 15 December 2004[95], Europass, the single framework for the transparency of qualifications and competences, was launched under the Luxembourg presidency on 31 January 2005. The Europass CV is the backbone of the Europass portfolio. It provides a common format for describing educational, professional and personal achievements and capabilities. It is enhanced by Europass Mobility-which records in a common format experiences of transnational mobility for learning purposes; Europass Diploma Supplement – which records the holder's higher educational record; Europass Certificate Supplement which clarifies professional qualifications gained through vocational education and training; and Europass Language Portfolio – a document in which citizens can record their linguistic skills and cultural expertise. The portfolio will improve the communication between employers and jobseekers throughout Europe[96].

8.4.2.   Outcomes of the working groups on the follow-up of the concrete objectives of education and training systems

(i)   Improving education and training for teachers and trainers (objective 1.1)

The 2004 Joint Interim Report emphasised the central role of teachers and trainers in the knowledge society. It highlighted the need to support ongoing professional development and, the importance of common principles for competences and qualifications as a means of ensuring transparency between systems, and attracting and retaining high quality graduates in the profession[97].

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[95]   Decision No 2241/2004, OJ, L390, 31.12.2004.
[96]   A network of National Europass Centres in participating countries and a European portal have been established with a view to achieving a target of three million Europass holders by 2010.
[97]   Continuing competence development for teachers and trainers in vocational education and training is also mentioned as part of the national priorities in the Maastricht Communiqué

In its 2004 progress report[98] the working group A on teachers and trainers reiterates the call on governments to make continuing professional development of teachers and trainers a priority at every stage of the teaching career. It stresses that the European dimension should be at the heart of their initial and continuing education if they are to be supported in their crucial tasks of raising awareness of the importance of the European project among young people, and preparing them to play their role as active citizens at local, national and European levels. Mobility should also be considered a priority as it provides a powerful means of enabling teachers and trainers to educate their learners for European citizenship and of deepening their own sense of being European citizens working in the field of education and training.

The policy recommendations made by working group A have contributed to the Commission's preparation of a set of common European principles for teacher competences and qualifications which aim to support policy makers at national and regional levels as appropriate, and in developing policies in response to the challenges faced by teachers and trainers in the knowledge based society. Building on this work, a draft recommendation on the quality of teacher education to support policy making in the Member States will be submitted to the Commission for consideration in early 2006.

A cluster group set up in spring 2005 in order to take forward the work on teachers and trainers is organising peer learning activities on lifelong professional development of teachers and trainers and the importance of partnerships in the initial and continuing professional development of teachers and trainers.

(ii)   Developing key competences for the knowledge society (objectives 1.2, 3.2, 3.3)

The 2004 Joint Interim Report emphasised that the development of the knowledge society is raising the demand for key competences in the personal, public and professional spheres. It highlighted the need for every citizen to acquire a package of key competences by the end of compulsory education, which could serve as a platform for development and updating throughout life.

In its 2004 progress report[99] the working group B on key competences makes a strong call on governments to take a competence-based approach in the development of national education and training policies. It underlines that key competences should be acquired by everyone, and validation of key competences should be promoted to support further learning and employability. The development of key competences should be supported by strengthening the professional development of teachers, the development of open learning environments, policies addressing literacy and extending the adult education and training provision. National strategies addressing educational disadvantage should be developed in close connection with social and employment policies and supported by individual guidance and counselling as well as recognition of prior learning. Entrepreneurship education and training should also be strengthened.

The policy recommendations made by working group B have contributed to the Commission's preparation of a European Framework on key competences for lifelong learning. The framework provides common references aimed at supporting the development

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[98]   http://europa.eu.int/comm/education/policies/2010/objectives_en.html#training
[99]   http://europa.eu.int/comm/education/policies/2010/doc/basic2004.pdf

of national policies identifying the key competences and how they can be, together with traditional skills, better integrated in the curricula, learned, and maintained through life. Building on this work, the Commission has adopted a draft recommendation of the European Parliament and of the Council on key competences 9 November 2005.

The work on key competences will be followed-up by a cluster group to be launched as part of a second wave of clusters (see point 8.3.1).

(iii)   Ensuring access to ICT (objective 1.3)

The 2004 Joint Interim Report emphasized the importance of integrating information and communication technologies (ICT) in education and training systems. It highlighted for example, the need to include ICT skills in a package of key competences every citizen should acquire by the end of compulsory education.

In its 2004 progress report[100] the working group C on ensuring access to ICT for everyone reiterates the call on governments to embed ICT-related policies and strategies into long term educational objectives and underlines the role that ICT may play in fostering citizenship and personal development in the education system. The working group also re-states the need to ensure new ICT-related support services for education; to empower educational actors and addressing new challenges; and to develop research, indicators, access to results and specific fields of application.

The work on ICT is being carried forward by a cluster group, which is organising a peer learning activity on learning networks developed under the Norwegian programme for digital literacy and on the Finnish virtual schools.

(iv)   Increasing recruitment to scientific and technical studies (objective 1.4)

The 2004 Joint Interim Report highlighted the persistent shortage of women in scientific and technical fields and called on Member States to encourage the development of a scientific and technical culture among its citizens.

In its 2004 progress report[101] the working group D on increasing the participation in Maths, Science and Technology (MST) calls for improvements as regards the role of technology in curricula, accommodating the needs of low-achieving pupils; establishing a gender balance in MST; connecting more systematically MST to real-life contexts and experiences; strengthening activity-based teaching; improving access of teachers to resource centres supporting the development of new innovative pedagogical methods; improving the "valorisation" of practical work in the assessment procedures; involving more actively the student and parents in MST; and developing partnerships between schools, universities and industry.

A cluster group will be set up in order to take forward the work on Maths, Science and Technology as part of a second wave of clusters (see point 8.3.1), and more specifically on the

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[100]   http://europa.eu.int/comm/education/policies/2010/doc/info2004.pdf
[101]   http://europa.eu.int/comm/education/policies/2010/doc/math2004.pdf

European benchmark on Maths, Science and Technology adopted by the Education Council in May 2003[102].

(v)   Improving language learning (objective 3.3)

The 2004 Joint Interim Report recognised the social and economic value of linguistic skills and underlined that Member States should, in particular, develop coherent language policies, including relevant teacher training.

In its 2004 progress report[103] the working group on languages reiterated the need for increased efforts to promote the awareness of the importance of linguistic diversity, which should in particular focus on the needs and benefits to specific geographic areas, target populations and age groups. The growing popularity of early language learning was acknowledged as beneficial, but the group emphasised the need to properly train teachers and to adequately promote linguistic diversity. The rigidity of systems and curricula, the scarcity of appropriate materials and of trained teachers and concerns about the possible effects on learning of the first language of instruction were identified as limiting factors for a widespread adoption of content and language integrated learning – a methodology which should be extended to all categories of students. More flexibility in administrative systems was identified as a key requirement for implementing the recommendation concerning recognition of language teaching qualifications abroad.

The working group also assisted the Commission in preparing and implementing the Action Plan 2004-2006[104], and it was consulted on the development of the European indicator of linguistic competence, which was requested by the Barcelona European Council on 15-16 March 2002[105] and which the Commission proposed on 1 August 2005[106].

(vi)   Making best use of resources (objective 1.5)

The 2004 Joint Interim Report defined the need to invest more, and more efficiently and effectively in human resources as one of three levers of success for the Education and Training 2010 work programme. It highlighted the need to involve a higher level of public sector investment in key areas for the knowledge society and a higher level of private investment in higher education, adult education and continuing vocational training.

In its 2004 Progress Report[107] the working group E on making best use of resources presented a general, non-binding and flexible toolbox of evidence-based policies successfully implemented in several Member States, which could encourage peer learning activities with other interested countries and support national policies and reforms. This combines concrete and detailed messages and proposals to improve education and training policies and suggests possible approaches for the institutional reforms and incentive mechanisms necessary to increase efficiency and equity as well as quality and access in education and training systems.

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[102]   The total number of graduates in mathematics, science and technology in the European Union should increase by at least 15 % by 2010 while at the same time the level of gender imbalance should decrease.
[103]   http://europa.eu.int/comm/education/policies/2010/doc/lang2004.pdf
[104]   "Promoting language learning and language diversity: an action plan 2004-2006", adopted by the Commission on 24 July 2003 (COM (2003)449).
[105]   The Barcelona European Council conclusions, 15-16 March 2002 (SN 100/1/02 REV 1), paragraph 44.
[106]   Commission Communication "The European Indicator of Language Competence" (COM (2005) 356).
[107]   http://europa.eu.int/comm/education/policies/2010/doc/best2004.pdf

The work on making best use of resources is being carried forward by a cluster, which organised a peer learning activity on the Portuguese system for supporting less-advantaged students attending private universities. Peer Learning Activities on autonomy/accountability and the use of resources in compulsory education are also planned.

The Commission has established a European Expert Network on Economics of Education (EENEE), which will host its 2nd Symposium "Efficiency and Equity in European education and training systems" on 15-16 November 2005. The objective is to provide a forum for policy-makers and researchers to draw up concrete proposals for the development of efficient and equitable human capital policies in line with the progress on efficiency and equity issues accomplished by working group E, the cluster on resources as well as working group G on active citizenship, equal opportunities and social cohesion (see point 8.4.2 (viii)). A draft Communication on this issue will be submitted to the Commission for consideration in 2006.

(vii)   Increasing mobility and European cooperation (objectives 3.4, 3.5)

The 2004 Joint Interim Report emphasised the need to increase the level and quality of mobility in education and training as well as the need to increase mobility through removal of obstacles and active promotion in line with the 2000 action plan on educational and occupational mobility and the 2001 recommendation on the mobility of students, people in training, volunteers, teachers and trainers[108].

In its 2004 progress report[109] the working group F on mobility and European cooperation produced a discussion paper on a reference framework for policies to promote access to mobility – based on the introduction of a mainstreaming approach – and a draft charter on the quality of mobility for learning purposes. The draft charter includes a set of principles on all phases and aspects of mobility experiences, to be implemented on a voluntary basis and adapted to specific needs. An annex provides examples of good practices. On this basis the Commission proposed a recommendation on transnational mobility on 23 September 2005[110].

(viii)   Supporting active citizenship, equal opportunities and social cohesion (objectives 2.1, 2.3)

The 2004 Joint Interim Report emphasized the important role of education and training systems in pursuing social inclusion policies and promoting active citizenship. It highlighted the need to target efforts at the disadvantaged groups, such as people with low level of literacy or qualifications, older workers, groups living in disadvantaged areas or outlying regions, and people with learning difficulties or with disabilities.

In its 2004 draft progress report the working group G on supporting active citizenship, equal opportunities and social cohesion reiterates the call on governments to set up strategic interdisciplinary task forces on lifelong learning and emphasizes the importance of including social inclusion as a key objective in the development of coherent and comprehensive national lifelong learning strategies. The working group also re-states the importance of ensuring access to lifelong learning for people with disabilities; enhancing the provision of targeted learning opportunities for disadvantaged groups; and developing appropriate quality

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[108]   OJ L 215 of 9.8.2001, p. 30.
[109]   http://europa.eu.int/comm/education/policies/2010/doc/mob2004.pdf
[110]   Commission Communication on transnational mobility within the Community for education and training purposes: European Quality Charter for Mobility (COM2005)450 final).

assurance, monitoring and evaluation systems. Finally, the provision of (formal and non-formal) education and training in active citizenship should be further developed. Member States should set up or sustain appropriate support structures delivering the necessary teaching material, research facilities and teacher training and should systematically provide quality assurance, monitoring and evaluation systems.

The recommendations of working group G will be carried forward and fed into the draft Communication on efficiency and equity issues in education and training, which will be submitted to the Commission for consideration in 2006 (referred to in point 8.4.2 (vi)).

(ix)   Creating an open learning environment, making learning attractive and strengthening links with working life and society (objectives 2.2, 2.1, 3.1)

The 2004 Joint Interim Report re-emphasises the importance of lifelong learning identifying it as one of three levers for success in achieving the Education and Training 2010 work programme. It urges Member States to put in place by 2006 comprehensive and coherent lifelong learning strategies, which incorporate "learning environments which are open, attractive and accessible to everyone".

The working group H on open learning environments, making learning attractive and strengthening links with working life and society has taken forward the work of the expert groups on lifelong guidance and non-formal and informal learning (see point 8.4.1) under the Copenhagen-process. Many of the other priorities are being pursued in the follow up to the Maastricht Communiqué which emphasised attractiveness, open learning approaches, guidance and flexible individualised pathways, learning-conducive environments at work and learning partnerships (see point 8.4.5).

A draft communication on Adult Education will be submitted to the Commission for consideration at the end of 2006.

8.4.3.   Progress on higher education in the Lisbon strategy

The higher education strand of the Education and Training 2010 work programme is in particular related to the targets that the European education and training systems should by 2010 have become a "*world quality reference*" and "*the preferred destination of students, scholars and researchers from other world regions*". The 2004 Joint Interim Report emphasised that the need for change was particularly acute in higher education and stressed the urgency of national educational reforms in achieving the overall Lisbon goals.

In April 2005, the Commission published its Communication on the need to enable universities to make their full contribution to the Lisbon Strategy, which outlines the main policy priorities for higher education policies in the EU[111]. The communication identifies the major bottlenecks in European higher education systems (its fragmentation, the uniformity within each system, the relative insulation from industry, its over-regulation in many countries and under-funding in comparative terms) and calls for a modernisation agenda around three political objectives: increased attractiveness, better governance and further investment.

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[111]   The European Commission communication (April 2005) entitled *"Mobilising the brainpower of Europe"* (COM (2005) 152 final).

The communication calls for increased differentiation of courses, admission criteria and teaching and learning processes in order to cope with the diversity of learner needs, to encourage the emergence of excellence and to raise the attractiveness of Europe's higher education systems[112]. It underlines the importance of better system and institutional management ("governance") where universities are responsible for their programmes, resources and outcomes while the State is responsible for the general orientation of the higher education system. Finally, it stresses the need for more and more efficient funding, through targeted investment in quality, innovation and reforms. Member States should stimulate funding from industry and should make certain that their model for student contribution and funding, guarantees fair access for all qualified students.

On this basis it is envisaged that the Education Council will adopt in November 2005 a Resolution that will take note of the Commission's Communication as an important contribution to the debate on how to raise the quality of higher education across Europe as a means of increasing Europe's competitiveness and invite Member States and the Commission to further address these issues.

It is anticipated that the Commission Communication and the Council Resolution will be followed-up by peer learning activities on higher education.

8.4.4. Higher education and the Bologna process

The Bologna process coincides largely with EU policy in higher education. The Commission therefore stimulates Bologna initiatives at European level and participates as a full member in the Bologna Follow-up Group. From an EU-perspective, there is also an obvious link between the Bologna process and the Copenhagen process on Vocational Education and Training (in fields such as Europass, Credit transfer for VET, Quality Assurance for VET and the European Qualifications Framework).

(i) Quality Assurance in higher education

The quality of higher education has proven to be at the heart of the setting up of a European Higher Education Area. Ministers have committed themselves to supporting further development of quality assurance at institutional, national and European level. They have stressed the need to develop mutually shared criteria and methodologies on quality assurance.

The European Association for Quality Assurance in Higher Education (ENQA) was established on the basis of the 1998 Council Recommendation on European Cooperation in Quality Assurance in Higher Education[113]. The Commission has actively supported its setting up and its development, which opened the door to the mandate given in 2003 by the Ministers of Bologna countries to ENQA and its partners, namely "to develop an agreed set of standards, procedures and guidelines on quality assurance, to explore ways of ensuring an

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[112] The increased diversity should be supported by policy measures at European level, in particular the European Qualification Framework and the development of Quality Assurance systems in higher education

[113] 98/561/EC of 24 September 1998.
http://europa.eu.int/eur-lex/pri/en/oj/dat/1998/l_270/l_27019981007en00560059.pdf.

adequate peer review system for quality assurance and/or accreditation agencies or bodies, and to report back through the Follow-up Group to Ministers in 2005[114]".

The ENQA follow-up report was presented in advance of the Ministerial meeting in Bergen in May 2005, where the proposed European standards for internal and external Quality Assurance of universities and those applying to Quality Assurance agencies themselves were adopted. The establishment of a European Register of Quality Assurance agencies was also agreed in principle, thus creating the basis for mutual recognition of quality assurance systems and assessments[115]. These efforts are underpinned, in the EU context, by a proposal for a Recommendation on further European cooperation in quality assurance in higher education put forward by the Commission in October 2004[116]. The Recommendation adopted in October 2005 acknowledges the importance of internal quality systems within higher education institutions, encourages the move towards compatible standards and a European Register of quality assurance agencies, acknowledges that universities should be allowed to choose from agencies complying with the requirements for admission to the "Register" calls upon governments to accept assessments made by such agencies as a basis for their decisions, in accordance with the national legislations[117].

The work on Quality Assurance may be carried forward in 2006 by a cluster group on Quality Assurance in higher education and vocational training (see point 8.3.1) The cluster should ensure complementarity with the ongoing peer learning activities on quality assurance in vocational education and training, in the context of the Copenhagen process (see point 8.4.5).

(ii)   Towards a European Higher Education Area

A major thrust of the Bologna agenda has been on the need to distinguish between an undergraduate and a (post) graduate phase in all degree structures in the participating countries. All Ministers committed themselves to having started the implementation of the undergraduate-graduate divide by 2005. The Commission supports initiatives enhancing the comparability and compatibility of qualifications[118].

The Commission has also supported the initiative to design an overarching framework of qualifications for the European Higher Education Area serving as a common reference for national frameworks. The basic articulation of the European framework around three main levels (first degree, Master, Doctorate) has also been approved by Ministers in Bergen. These initiatives come in direct support of the mobility of students and of the employability of graduates on the European labour market. This framework has been integrated into the development of the overall European Qualifications Framework for lifelong learning (see point 8.4.1).

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[114]   "Realising the European Higher Education Area", Communiqué of the Conference of European Ministers Responsible for Higher Education, Berlin, 19 September 2003, p. 3.
http://www.bologna-bergen2005.no/Docs/00-Main_doc/030919Berlin_Communique.PDF.

[115]   "The European Higher Education Area – Achieving the Goals", Communiqué of the Conference of European Ministers Responsible for Higher Education, Bergen, 19-20 May 2005, p. 2.
http://www.bologna-bergen2005.no/Docs/00-Main_doc/050520_Bergen_Communique.pdf.

[116]   COM (2004) 642 final Brussels, 12 October 2004.

[117]   This proposed Recommendation is currently being discussed by the European Parliament and the Council (joint adoption expected in October 2005).

[118]   Notably the university project "Tuning Educational Structures in Europe" in which professors from 135 universities seek to describe the content of qualifications in nine different subject areas in terms of workload, level, learning outcomes, competences and profile.

(iii)   *Promoting the attractiveness of the European Higher Education Area*

The Commission helps universities develop integrated study programmes through Socrates-Erasmus Curriculum Development Projects. Special support for the implementation of Joint Masters has been provided since 2004 through the Erasmus Mundus programme. The Commission will award up to 8000 scholarships to students and scholars from other continents and from Europe in the framework of the Erasmus Mundus programme. Through this programme, the Commission will also support a marketing strategy for European Higher Education, bringing European quality and distinctiveness higher up the attention scale of the best partners, students and scholars world-wide.

Structural reforms inspired by the Bologna agenda are gaining ground, but have not yet reached all higher education institutions. The Commission continues to provide up-to-date documentation and organises case studies and workshops on higher education issues as part of the work programme Education and Training 2010. A Call for Tender has been published in April 2005 for the setting up of an "Information Project on Higher education Reform".

8.4.5.   Progress in implementing the Copenhagen process for vocational education and training

(i)   The Maastricht Communiqué

The first major review of the Copenhagen process took place in Maastricht at a ministerial meeting and conference in December 2004. A study[119] was carried out in preparation for the meeting, which assessed the contribution of vocational education and training (VET) in Members States' progress towards achieving the Lisbon goal and the relevance of the Copenhagen process and its priorities for national policy. On this basis ministers and European social partners together with the European Commission agreed the Maastricht Communiqué on the future VET priorities at national and EU level.

The Maastricht Communiqué endorses the objective of increasing voluntary cooperation in VET in order to improve quality, promote mutual trust, transparency and recognition of competences and qualifications, and increase mobility and facilitate access to lifelong learning. It underlines the continuity of work under the Copenhagen process and its compatibility and complementarity with the "Education and Training 2010" work programme.

The priorities of the Communiqué highlights many of the issues emerging from the Maastricht study as well as the awareness that in relation to many priorities the European contribution is developed and the result must now be taken up and used by Member States. For this reason ministers agreed new priorities at national level[120]   with   a   view   to   modernising   their

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[119]   Maastricht Study. Achieving the Lisbon goal: The contribution of VET, 2004.
http://europa.eu.int/comm/education/policies/2010/study_en.html

[120]   These priorities include: 1) Implementation and use of agreed instruments, and raising awareness and visibility at all levels; 2) Improvement of public and private investment in VET, as well as training incentive effects of tax and benefit systems; 3) Use of the European Social Fund and European Regional Development Fund to support the Education and Training 2010 priorities, in particular innovative VET reforms and developing skills and competences; 4) Development of VET systems to meet the needs of people and groups at risk of labour market and social exclusion, particularly through targeted and tailor-made provision; 5) Introduction of open and flexible learning pathways and frameworks to reduce barriers between VET and general education and improve progression to continuing training and higher education; 6) Increasing the relevance and quality of VET systems by

vocational education and training systems, and offering all Europeans, whether they are young people, older workers, unemployed or disadvantaged, the qualifications and competences they need to be fully integrated into the emerging knowledge based society, contributing to more and better jobs.

The Communiqué sets five priorities at the European level: 1) Consolidation of existing Copenhagen priorities; 2) An open and flexible European Qualifications Framework (see point 8.4.1); 3) Further development and implementation of the credit transfer system for VET (ECVET); 4) Examination of the learning needs and role of vocational teachers and trainers, including possibilities to make their profession more attractive and update their professional skills (see point 8.4.2); and 5) Improvement of the scope, precision and quality of VET statistics (see point 8.3.4).

(ii) *Progress on the Copenhagen priorities*

Member States are engaged in addressing the national priorities. Peer learning and workshops, to be organised within the framework of the Community Study Visit Programme coordinated by Cedefop, will support their efforts. The Directors General for Vocational Training are actively contributing to the process and the national priorities from the Maastricht Communiqué provide themes for the rolling agenda of their bi-annual meetings. A study has been launched to assess progress on the priorities in preparation for the next review of the process to take place during the ministerial meeting during the Finnish EU Presidency, in December 2006. It will also examine in detail the situation with regard to open pathways and progression to higher education; the role of VET in labour market and social integration and investing in and financing VET. Steps are being taken to raise stakeholders' awareness of the process and to widen the group of actors involved in its implementation and follow up, particularly training providers and establishments.

(iii) *European credit transfer system for VET*

A European credit system for vocational education and training (ECVET), to allow trainees to build upon their achievements when moving within national systems or from one national VET system to another, is now in its final phase of development. Since Maastricht, the ECVET technical working group has produced a prototype for the accumulation and transfer of credit in VET, along with principles and rules for a European credit transfer, to ensure its effective implementation in mobility exchange initiatives. The prototype was presented to the Directors General for Vocational Training at their meeting in London on 14 July 2005 and it will be tested until the end of, primarily for the mobility of apprentices and other young trainees as specifically requested by the European Parliament. This tool based on learning outcomes and, therefore totally in compliance with the principles of European Qualifications Framework (EQF-see point 8.4.1) will facilitate the accumulation, exchange and transfer of learning credits in any context, thus enabling citizens to pursue lifelong learning. It is therefore an important building block for the success of EQF. Furthermore the introduction of the 8 EQF reference levels replies to the requirements of the Copenhagen Declaration in relation to the transparency, comparability and recognition of competences and qualifications and will underpin the implementation of ECVET.

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involving the relevant partners, building partnerships and by early identification of and mutual planning to provide for skills needs; 7) Developing learning environment in training organisations and at work, which support self-organised learning and utilise eLearning; and 8) Continuing competence development for teachers and trainers in VET, reflecting their specific learning needs and changing role.

(iv)   *Common Quality Assurance Framework for VET*

A Common Quality Assurance Framework for VET (CQAF) was endorsed by the Council in May 2004. The framework helps to develop, improve, monitor and evaluate national systems and practices, and provides a common reference system for quality development of VET systems across countries. It provided a basis for several initiatives which were taken in 2004-2005, at both national and European levels[121].

At <u>National level</u>, the CQAF has been used in several countries to support policy debate and guidelines, the launching of pilot projects (in particular on self-assessment of training providers), information/dissemination initiatives, and organisation of conferences associating other EU countries. At <u>European level</u>, the CQAF was the lever for launching a programme of European peer learning activities from 2004-2006 with the use of the Cedefop study visits programme[122]. Several studies were also launched in the field of quality assurance in VET, and different initiatives to increase synergies with the Leonardo da Vinci programme were taken.

Following the favourable opinion of the ACVT at its meeting of 16-17 June 2005, a European Network of competent bodies for quality assurance in VET has been established, on a voluntary basis, following its launch in October 2005, in Dublin. This platform provides a structured mechanism for sustainable cooperation on quality assurance and development, at system and provider levels, and thereby a means to further the implementation of the Council conclusions and Resolutions[123], as well as progress towards the Barcelona European Council target of making Europe's education and training systems a world quality reference by 2010[124].

The work on Quality Assurance may be carried forward by a cluster group on Quality Assurance in vocational training and higher education as part of a second wave of clusters (see point 8.3.1 and point 8.4.3).

(v)   *Teachers and Trainers in VET*

Although teachers and trainers in VET were prioritised in the Copenhagen Declaration, the Maastricht study found that few attempts have been made at the European level to tackle the specific challenges of training them. However, their competences and knowledge are important factors influencing the quality of VET, and innovation in teaching (which up to now has been lacking in the priorities). Therefore, the Maastricht Communiqué calls for

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[121]   See 'Technical Working Group progress report', 2004

[122]   Peer learning on quality assurance was included in the work programme of the technical working group in 2004. In 2005, peer learning activities are being organised in Norway and Italy. In 2006, peer learning activities are being organised in association with a preparatory study for the Austrian Presidency on quality assurance. Further peer learning visits to Hungary, Netherlands and Romania are in the planning but will still have to be confirmed. Participants have been chosen in consultation with members of the technical working group.

[123]   Council Conclusions on Quality Assurance in Vocational Education and Training, 18 May 2004; Conclusions of the Council and the representatives of the Member States meeting within the Council (29 October 2004), reviewing the Council Resolution of 19 December 2002.

[124]   A steering group has been set up by the Commission to follow-up the 'rolling agenda from Dublin to Graz'. This covers the launching of the European Network in Dublin, its work programme and the activities linked to the initiative of the Austrian Presidency in 2006 (conference in Graz) to promote cross fertilisation between QA in VET and HE.

examination of their specific learning needs and changing role and the continuous updating of their skills. In immediate response, the Training of Trainers Network, coordinated by Cedefop, has initiated work on the identification of the learning needs of teachers and training in VET and attention is given to vocational teachers in initial VET in the recommendation resulting from the work of working group A (see point 8.4.2). In 2006, the focus will move in particular to the more fragmented profession of trainers, its definition and occupational profile, and may include peer learning to explore the links with working life.

(vi)   Sectoral qualifications

The strategy for sectoral qualifications priority under the Copenhagen process has been implemented by various means, based on an extensive mapping of education and training activities at sectoral level currently carried out by Cedefop. The database resulting from this mapping will provide – for the first time – an overview over the amount and profile of initiatives at this level. The Leonardo da Vinci programme is being used to actively support initiatives at this level. The proposed European Qualifications Framework (see point 8.4.1) will explicitly address the need of sectoral stakeholders and could be used as a common reference for development of qualifications and competences in industry and service sectors. The European Qualifications Framework may also facilitate the linking of sectoral and national qualifications. Sectors are becoming increasingly important in taking forward European and international education and training solutions. Due to their decentralised character, initiatives like the Cedefop database and the European Qualifications Framework are important to ensure coherence and continuity.