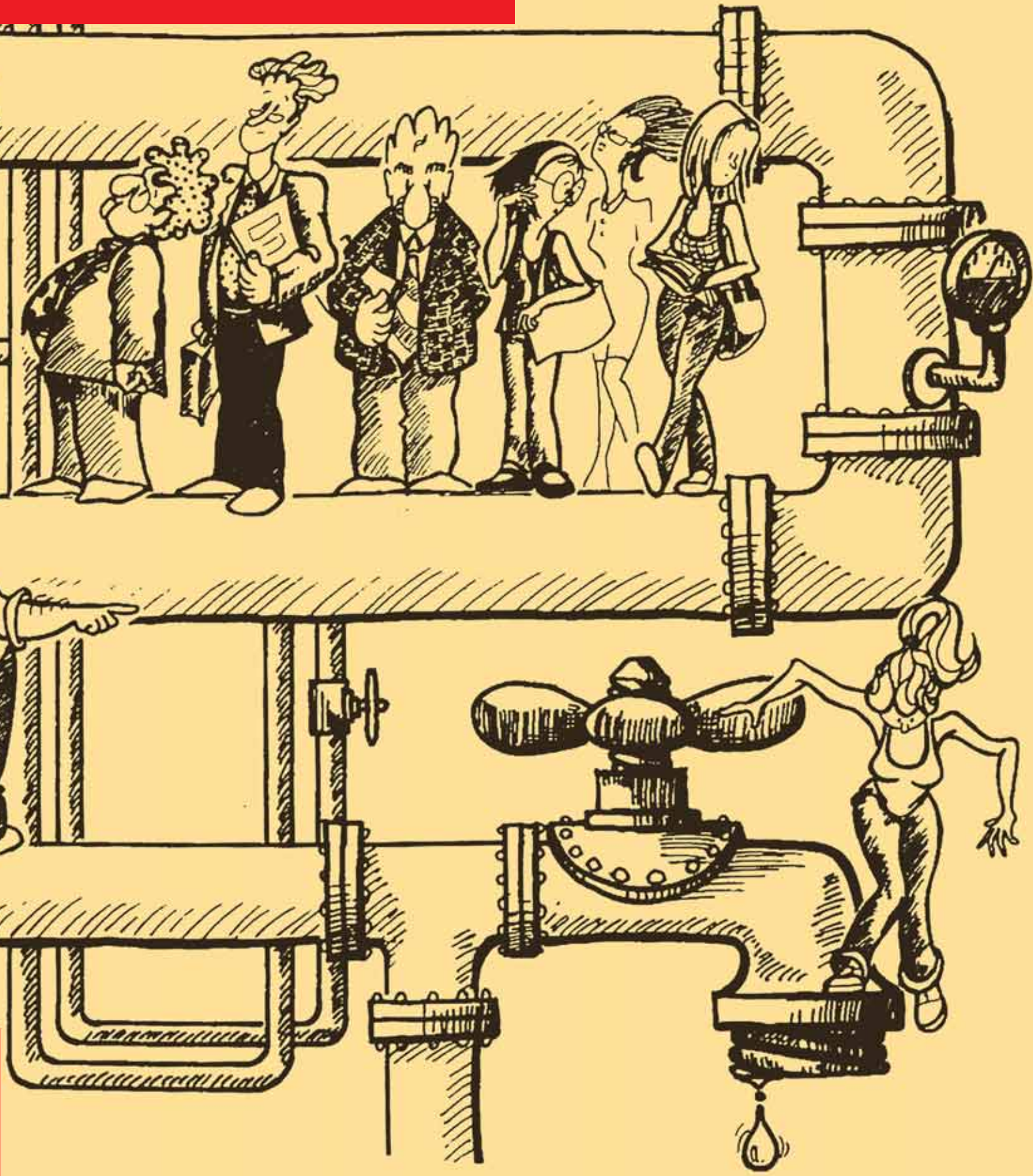


# VOCATIONAL

European Journal

# TRAINING





**Cedefop  
European Centre  
for the Development  
of Vocational Training**

**Europe 123  
GR-570 01 THESSALONIKI  
(Pylea)**

**Postal address:  
PO Box 22427  
GR-551 02 THESSALONIKI**

**Tel. (30) 23 10 49 01 11**

**Fax (30) 23 10 49 01 17**

**E-mail:  
info@cedefop.eu.int**

**Homepage:**

**www.cedefop.eu.int**

**Interactive website:**

**www.trainingvillage.gr**

Cedefop assists the European Commission in encouraging, at Community level, the promotion and development of vocational education and training, through exchanges of information and the comparison of experience on issues of common interest to the Member States.

Cedefop is a link between research, policy and practice by helping policy-makers and practitioners, at all levels in the European Union, to have a clearer understanding of developments in vocational education and training and so help them draw conclusions for future action. It stimulates scientists and researchers to identify trends and future questions.

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The Journal is nevertheless independent. It has an editorial committee that evaluates articles following a double-blind procedure whereby the members of the Editorial Committee, and in particular its rapporteurs, do not know the identity of those they are evaluating and authors do not know the identity of those evaluating them. The committee is chaired by a recognised university researcher and composed of researchers as well as two Cedefop experts, an expert from the European Training Foundation (ETF) and a representative of Cedefop's Management Board.

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Tél. (351-21) 843 10 36  
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E-mail: deep.cid@deep.msst.gov.pt

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**Interested in writing an article ... see page 90**



# The Study Visits Programme celebrates its 20<sup>th</sup> anniversary

Though a part of the Leonardo da Vinci programme since the Council Decision of 26 April 1999, the Community Study Visits Programme has actually been operating since 1985. Its origins can be found in two Council Resolutions. The first, adopted on 25 June 1983 (OJ C 166), concerned measures to be taken for vocational training in terms of the new information technology; the second, dated 20 July 1983 (OJ C 193), referred to vocational training policies in the 1980s. On the basis of these resolutions the Commission was asked to devise a programme of study visits targeted at vocational training specialists.

The three objectives of the programme as the Commission defined them in January 1985 have retained their topicality. The programme aims, first, to allow specialists in vocational training to improve their knowledge of specific aspects of the policies and programmes of vocational training in other Member States. Secondly, to encourage the permanent exchange of ideas and information between programme participants, including the visitors and their hosts in Member States. And finally, to enrich the flow of information between Member States and the Community level. These exchanges are particularly useful for innovative activities linked to the priorities of Community policy in vocational training.

Since its inception, the programme has given policy-makers the opportunity to exchange information and hold discussions on subjects of common interest at the European level. Today, these common themes are defined within the framework of the Bruges-Copenhagen-Maastricht processes and within the common framework of action of the social partners at both European and sectoral level.

These priorities have been inscribed in a master plan for 2004-2006 and are reflected in the 2005 Study Visits catalogue. In 2005, participants will engage in 'peer learning reviews' during the visits, in cooperation with the Commission working groups.

## **The enlargement of Europe**

In the past twenty years, the European Union has grown from 10 to 25 Member States. More to the point, 31 countries can now benefit from the Study Visits Programme. The routes taken by these 'pilgrims' of vocational training - even if they are mostly calculated in air miles - have become longer: the average distance between the centre and borders of Europe has at least doubled. We now have two Mediterranean regions to deal with, north and south; new intellectual and commercial links; and the beginning of a new division of labour. The common features of systems and developments, which the war, the 'iron curtain' and the revolutions had hidden from view, are now re-emerging, the better to help us face the challenges of enlargement and globalisation.

## **Travelling, seeing, understanding**

A study visit allows participants to think and discuss from within the country concerned by the Leonardo da Vinci Programme, rather than from a distance. Visitors can meet important figures of vocational training and specialists on the subject under study at the locus of implementation of related actions.

A second feature of the programme is that it frames its activity within a multinational and multifunctional group of ten to fifteen people. All of them are players in the vocational training field: administrators at national or regional level, elected local offi-



cials, representatives of employers or employees' organisations, researchers, training organisation managers. This diversity of background, and therefore of approaches, comes on top of the diversity of national origins to further enrich the debate. All this means that exchanges tend to continue during travel time and meals and in the evening.

As in medieval inns, travellers in the group also become story-tellers who, by recounting specific experiences and viewpoints, reveal what vocational training is like in their country.

### Results

Despite the relatively short duration of these visits (3 to 5 days), physical mobility leads to intellectual mobility, as all travellers experience in a foreign land. This perspective allows participants to see their own turf under a new angle. By asking questions of everyone about their practices, this approach kindles reflection and creativity and allows participants a better understanding of their own activities.

Holding the study visit abroad makes the feeling of 'otherness' even stronger. It makes everyone observe more carefully, doubt how much they understand, search for keys and explanations. Participants can immediately benefit from such experiences. Their role as decision-makers or disseminators of ideas favours the creation of networks and the elaboration of transnational or national projects; good practices, when analysed under this light, can be transferred and transformed.

To mention a prominent example, the seeds for the European orientations on training in the agricultural sector were sown in Denmark, during the very first years of the programme. Study visits also undoubtedly contributed to the understanding of how the various 'dual training' or 'rotation' systems work, not to mention modular actions, NVQs, et cetera.

To representatives of the 'new' Member States and acceding countries, the Study Visits Programme is an important way of getting to know the policies of vocational training in the European Union.

### What next?

The Commission's proposals for the future of the programme are ambitious in terms of both quality and quantity. The 'pilgrims' of vocational training will continue to travel to the various countries of Europe in order to better understand the challenge of developing skills and ensuring social cohesion. There is still much road to cover before achieving the Lisbon and Maastricht objectives - and others, too. The horizon is expanding.

In the past 20 years, networks have been created, and the fruits of these efforts have ripened.

In Thessaloniki we celebrate this harvest while preparing to travel again to new shores.

*I ran ropes  
from spire to spire,  
garlands  
from window to window,  
golden chains  
from star to star*

Arthur Rimbaud /Illuminations

*But do not hurry the voyage at all.  
It is better to let it last for many years;  
and to anchor at the island when you are old,  
rich with all you have gained on the way*

Ithaca /Cavafy



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# Foreword



**Marie-Jeanne  
Maurage**

Following the Pisa study, and considering the distance still to be covered to achieve the targets fixed at the Lisbon summit, comparisons between education and training systems have become the order of the day. Decision-makers and practitioners want to know why 'the others' get higher marks, or why they are quicker to produce a qualified workforce - at least one that seems to meet employer expectations.

One way to understand and to compare is, evidently, to observe in situ how systems work, who runs them, what principal challenges they face, and which solutions they have devised to solve which problems.

To this end, 25 years ago the European Union created a tool which is still useful to this day: the Community Study Visits Programmes. These are Arion, set up in 1978 for decision-makers in education; and the programme managed by Cedefop for those responsible for vocational training, set up in 1985.

The aim of these programmes is to offer transnational groups of 8 to 15 decision-makers or specialists (in education for Arion, in vocational training for what are commonly referred to as the 'Cedefop' visits) the opportunity to visit a country together in order to discuss a theme of common interest in the field of education and training. These short trips last three to five days. Themes discussed may be related to the presentation of national systems, or the role of parents in schooling, or the needs of small and

medium enterprises vis-à-vis the growing use of information technologies. Particular sectors (banks, the food industry, transport) and methods of ensuring quality within a system are as much a part of these themes as language teaching or school schedules.

To travel, to see, to question - is this enough to enable us to compare ?

Under what conditions are international comparisons even possible ?

How can one draw lessons from the experience of a 'foreign' country ?

This is the challenge facing every international study visit; this is what every organiser and participant must be aware of and prepare for.

For this reason, on the occasion of the 25<sup>th</sup> anniversary of the Arion programme, the Commission invited Dimitris Mattheou, Professor of Comparative Education at the University of Athens, who is intimately familiar with exchange programmes in Europe, to offer his analysis of these issues.

Cedefop has asked him to provide the same service for the technical agencies of the Study Visits Programme for vocational training professionals.

We are pleased to be able to share this expertise with the readers of the European Journal.



**Dimitris  
Mattheou**

*Professor of  
Comparative  
Education, University  
of Athens*



**Learning from others in education through study visits and direct observation has a long history. It has always been comforting to expect to avoid mistakes by taking advantage of others' experience. This expectation is even stronger today in our endeavours to create a European future. Yet these are not always successful. Education institutions are too complicated and closely interwoven with society to allow for an easy and clear understanding of their functioning. This paper looks critically at the character and the prospects of study visit programmes. It identifies the difficulties and the pitfalls of study visits and investigates the circumstances under which such visits can really contribute to successful policy-making and problem resolution.**

(<sup>1</sup>) The English version of the questionnaire is in Stewart Fraser (1964). The Greek translation can be found in D. Mattheou (2000). See also Kalo-giannaki, P. (2002).

(<sup>2</sup>) Horace Mann, for example, reported to the Board of Education of the State of Massachusetts in 1844 that '... if we are wise enough to learn from the experience of others... we may yet escape the magnitude and formidableness of those calamities under which some other communities are now suffering. On the other hand, I do not hesitate to say that there are many things abroad which we, at home, should do well to imitate'; and Victor Cousin in his report (1833) insisted that 'The true greatness of people ... [consists]... in borrowing everywhere what is good and in perfecting it while appropriating it for oneself ... We can assimilate what there is good in other peoples without fear of ever ceasing to be ourselves'.

# Promoting understanding in education across Europe

## Study visits and the contribution of comparative education

This paper looks critically at the character and the prospects of study visit programmes. It identifies the difficulties and the pitfalls of study visits and investigates the circumstances under which such visits can really contribute to successful policy-making and problem resolution.

More than one and a half centuries ago, Marc Antoine Jullien de Paris, a French intellectual and educator, a cosmopolitan and friend of outstanding personalities like Napoleon, Jefferson, Pestalozzi and Humboldt, was among the first to appreciate the contribution education could make to the well-being of people and in the progress of European societies. He firmly believed that if backward European nations could only become acquainted with successful educational practices abroad, they would benefit from their example and progress (Jullien, 1817). To that end he devised a detailed questionnaire (<sup>1</sup>) aimed at collecting information systematically, and recommended that study visits of education officials to other European countries should be organised. In this sense he was a forerunner of many contemporary EU programmes such as Arion.

Although his project had only limited success, education officials did follow some of his recommendations. They travelled abroad, they visited schools and other institutions, they observed and took notes, they collected data and issued reports to their national authorities. Their aim was to discover, in foreign education systems, the optimum solution to their own education problems. It was the era of nation-building through the

construction of national education systems (Green, 1990), an era which comparative educationalists usually refer to as the period of selective education borrowing (Noah and Eckstein, 1969). It was firmly believed that successful foreign institutions and practices, once carefully observed and studied, could be transplanted and duplicated at home. Nation states could only benefit from such a process (<sup>2</sup>).

Yet by the end of 19<sup>th</sup> century it was quite evident that the newly established national systems of education had very different characteristics. Despite extensive educational borrowing, they had failed to converge. They differed in some of their fundamental values, in their structure and organisation, in their administration and so on. Perhaps more significant were the differences in the way peoples in Europe had been guided to perceive each other, a fact that allowed bloody confrontations to take place among them twice in 30 years during the 20<sup>th</sup> century.

Europe is a peaceful place today. Age-long hatred has given way to cooperation and compromise. The vision of a united Europe is gradually and, on occasion, grudgingly being accomplished. Education, still being de jure the exclusive responsibility of nation states, is now being called upon not only to serve exclusively the national interest, as in the past, but also to develop the European identity by promoting mutual understanding, by benefiting from each other's experience and by removing every obstacle that stands in the way of European integration. To this end - purposefully, sys-





tematically and openly - the EU authorities are trying to help educationalists grasp the essence of other peoples' ways of thinking as developed through education. To meet this clearly political objective, a number of programmes - among which the study visit programmes are reminiscent of the above-mentioned 19<sup>th</sup> century practices - have been developed. To be efficient in fulfilling this noble cause, the EU study visit programmes, on which this paper exclusively focuses, should make the best of the valuable experience and of the conventional wisdom of comparative education. In what follows, we present the main elements of this valuable experience and suggest the ways in which they may be used in making study visits effective instruments of mutual understanding across Europe.

### **The conventional wisdom of comparative education**

Comparative education is one of those academic disciplines that have had a turbulent life (Bray, 2003; Wilson, 2003; Cowen, 2000; Crossley, 2000; Matheou, 2000; Holmes, 1965; Hans, 1949). It started as an endeavour to reveal and understand the reasons that lay behind the differences observed among the newly established in the 19<sup>th</sup> century systems of education, despite the extensive and long-lasting cross-national influences in the field. It then aspired to confirm the causative relationship which allegedly existed between society and education, as part of the discipline's considerable contribution to the noble cause of preserving peace during the years between the two world wars. In the early post-war decades it focused on studying problems related to the democratisation of education and to development of education. Later on, reflecting the preoccupations of the day, it grappled with contemporary issues, from globalisation and the knowledge society to social exclusion and the learning process - all presently featuring in the education agenda. In all of these cases, even when pledging allegiance to the cause of pure theory, explanation and understanding, comparative education never actually renounced its political aspirations. As it dealt for decades with the realities of decision-making in education, it accumulated a rich and precious experience, which is codified in a number of 'articles of faith'. Three of these are particularly useful for the purpose of this paper.

The first article of faith for comparativists states that education is a 'living thing' (Sadler, 1964). You cannot extract selectively one of its parts, an institution for example, transplant it into a different national context and expect it to grow and bear the fruit it bore in its former environment. It is like expecting to grow an orchard in the Arctic out of transplanted date palms, or to grow an orange tree from leaves and flowers gathered from a neighbour's garden. The disillusionment of those foreign advisors who attempted to transplant western institutions into Third World countries in the 1960s (Arnové, 1980) or of those reformers who are presently involved in importing Anglo-Saxon managerialism into their own education systems (Cowen, 1996) bears witness to the truth of this assertion.

The second article of faith states that things outside education, i.e. in the broader social context, matter more than the things inside the education system itself (Sadler, op.cit.), in the sense that the social context is mainly responsible for every major development within education. The values that govern education are social values; educational concerns and priorities are basically social concerns and priorities. As individuals, we have been moulded by the society in which we have grown up; we are creatures of our time and circumstances, or as a prominent comparativist once put it, prisoners in a web of social meanings and assumptions we do not ourselves recognise (King, 1976).

Concern for equality of opportunity in education has direct expression in the social equality movement. The plea for further democratic reforms in education reflects contemporary social concerns to deepen and strengthen democratic citizenship, especially in those countries that have suffered in the near past under autocratic regimes. Respect for otherness in schools is an expression of the broader social consent for cultural pluralism and for political-cum-religious tolerance. Concerns to strengthen the school/labour market relationship bear witness to the significance attributed by society to the economic role of schools.

The last of the three articles states that social contexts, and hence education, differ. They have developed differently through history, under the influences of different forces and factors; present circumstances



and future prospects encompass different priorities and agendas of political action in education. Compare, for example, Irish and French society and then look at the place of religion in the school curricula; or compare English and Greek society and contrast the managerial autonomy of English schools to the complete administrative dependence of the Greek on the Ministry of Education; or compare Swedish and German society and observe the comprehensive organisation of the former and the multi-partied system of the latter. Compare American individualism and pragmatism to Japanese corporatism and paternalism in the business world and you will discover their relationship to social and educational values: to the protestant ethic and the pioneering spirit of early immigrants in the USA, and to the family values of respect and of concern for its members in Japan. Look at all these examples and you will readily appreciate the role of history and tradition. Look also at the entrepreneurial culture that has been introduced into English and Dutch universities and compare it with Greek university adherence to the notion of higher education as a public service and you will readily see how differently these societies perceive the issues of globalisation, international competition, modernisation, etc., that currently pervade public discourse.

### **Comparative education and study visit programmes**

To the education policy-maker the important question is not, however, the validity of the above three articles of faith; he/she probably readily agrees with them. The crucial point is how he/she could make use of them in constructing and successfully implementing study visits in practice. To provide a convincing though still tentative answer we should start with identifying the main aims of these programmes. Arion constitutes a good representative case: according to the Commission, 'the main aims of the study visits are: a) to enable those exercising important educational responsibilities [...] to renew and modify their work in the light of direct experience of educational structures and reforms in other member states and b) to increase the amount of high quality, selected and up-to-date information about education developments throughout the Community which is available to policy-makers' (European Commission, 2003).

It is clear that the Arion and other similar programmes, such as the Leonardo study visits, have a distinct reformist and meliorist outlook. Participating policy-makers, administrators and educators are expected to gain first-hand, trustworthy information that they can, and will, use at home - in reform projects and in education policies that will capitalise on other European countries' experience. It is an assumption and an approach to policy-making on the part of EU authorities which is reminiscent of the noble intentions of the founding fathers of state systems of education (never actually renounced as instruments of policy-making). For many years, politicians have continued to come back home from ministerial meetings - now perhaps more than ever before, as the meetings are more formal, frequent and multilateral - impressed by the education successes of particular countries and ready to embark on yet another reform project (Phillips, 1989; 2002). Should we remind ourselves of the enthusiasm social-democrat politicians exhibited in the 1960s over the Swedish comprehensive reform? Or perhaps of the excitement across Europe about technical-vocational education that would relieve the pressure on general education and propel economic development? Should we also remind ourselves of the impact British education policies in the 1980s had on neo-liberal politicians across Europe, or the present obsession with lifelong learning, adult education or quality assurance? How many times have technocrats, administrators and educators of all kinds at local, national and international levels brought to decision-making committees their frequently misconceived wisdom on foreign systems of education? Frequently this has taken the form of a scrappy mixture of circumstantial evidence, inadequate information, naive interpretation, unsustained generalisations, wishful thinking and prejudice. Every comparativist who has participated in policy-making committees can readily cite examples of unfeasible proposals based on various misconceptions of the realities of foreign institutions. In the face of all this, what does comparative education have to offer?

The first piece of advice comparative education can offer study visit officials has already been hinted at. By stressing the historical and contextual character of educational institutions and, the consequent limitations of educational borrowing, comparative education warns national policy mak-



ers against a naive and superficial interpretation of EU suggestions for national policy modifications 'in the light of direct experience of educational structures and reforms in other member states' (European Commission, op.cit.), that would lead to inconsiderate adoption of foreign education practices. It also exposes to pervasive criticism all those convenient assumptions and unsubstantiated certainties that frequently prevail in decision-making committees. Thus, from the beginning, policy-makers and prospective study visitors are made aware of the pitfalls of their task.

The second important contribution of comparative education consists in pinpointing the inherent difficulties facing all agents involved in a study visit programme. One is epistemological: our observations can never be truly objective, however hard we try. This is not so much because 'things that really matter most in life and in education, and the social situations in which they have their real meaning are far too complex to lend themselves to any kind of supposedly objective observation' (King, op.cit: 14); it is mainly because we see what we have learned to see. We bring to our observation our entire history, personality, present emotions and acquired intellectual equipment (ibid.: 15).

This is as true for the layman as for the expert. He too, especially when looking at a particular aspect of a foreign system of education, looks at it differently, according to whether he is an academic researcher, a consultant to foreign education authorities, a study visitor or a partner in a reform project; academic background and research priorities and skills also have an effect.

Our limited objectivity places a number of restraints and obligations on us. First, we should understand that this is so and be always alert to limitations in our observations. Secondly, we should systematically cross-check our data by comparing them with other reliable data or by consulting others who are more familiar with the specific educational system and its social context. We should try to develop our comparative skills by studying relevant methods and techniques. Finally, we should always remain open-minded, down-to-earth, moderate and circumspect and be prepared to put to the test all information and points of view and reconsider our views in the face of new ev-

idence. Perhaps today more than ever, we should be prepared to put to the comparative test, and to our critical judgement, all information about foreign educational developments and all advice from international organisations about our own educational systems.

The second difficulty is conceptual in character. It reminds us that every valid and reliable study should be based on a clear understanding of the concepts, and the ideological assumptions behind them, that underpin our perception of the world and of education, especially when it comes to studying foreign education systems. Concept formation takes place in a specific society and is therefore culturally defined. Even within a single society, people do not attribute the same meaning to the same concept. This is more evident with modern concepts like globalisation or knowledge society, to which different meanings are attributed by academic analysts. Incidentally, this calls for greater circumspection on our part when we are told that we have to abide by the rules set by the inescapable forces of globalisation, international competition or technological innovation. But to return to the comparative dimension: when attempting to study a foreign system of education, we must be fully aware that people abroad may attribute different meanings to some of our concepts. The term 'public school', for example, has a totally different meaning for the British than for the continental European. *Gastarbeiter* and their training are peculiarly German terms. Greek teachers have only recently become acquainted with the concept of 'curriculum' in its Anglo-Saxon version, although many of them still perceive the 'curriculum' - or the analytical programme as most of them still call it - as a list of the school textbook chapters to be taught. The same is true for the concept of 'professional autonomy', which in their eyes means they have fewer obligations to abide by central directives, rather than that they must participate fully in decision-making at the school level.

Indeed, every student of comparative education has, in taking his/her first steps in the field, undergone a cultural shock caused by approaching a foreign system of education with the conceptual baggage of his/her own cultural background. A Greek student, for example, carrying the basic concepts of a centralised system of education - centralism,



structural uniformity, legalism, etc. - would be hard pressed to understand how a system characterised by structural, administrative and curricular diversity can function. By the same token, the British student would find it equally difficult to perceive the character of instruction in Greek schools - where the content, organisation and teaching method are prescribed by the State - if he/she approaches it with the concept of professional autonomy in its English version. The moral is that unless we approach foreign education systems from the proper conceptual context it is almost certain that, by the end of our study, we will have gained the wrong impression, reached the wrong conclusions and hence, failed to benefit from other peoples' experience.

The third contribution of comparative education to the success of a study visit programme relates to the fact that education functions and operates within a social context which is constantly forged by tradition and by the vision of an aspired future. A study cannot be complete if it fails to understand and appreciate this context. You can not simply go out and visit schools - normally the cream of the education system that host authorities offer - attend lectures, talk with teachers and administrators and then be sure that you have a comprehensive view of the system, or a part, and of the policy you are interested in. More significantly, you cannot sense and appreciate the intangible forces that lie behind and explain its function and the dynamics of change in this specific education system. Yet without this appreciation, it is difficult to understand the context or to draw useful lessons from a study visit. Examples from Greece help illustrate this.

Suppose that the topic of interest during a study visit to Greece is the European dimension in schools. It is very likely that in your visit to Greek schools you will come across enthusiastic teachers working with highly motivated pupils in a number of well-designed projects in which a variety of creative approaches are utilised. Yet the success story you will have heard and seen would not serve you as a lesson for reform at home, unless you were able to take into account the specific social context of the situation you had observed. Greek society, as a whole, has always been inclined to strengthen its links with Europe and the European Union, both on cultural and on

political grounds. Greeks have always prided themselves on having offered Europe the fundamentals of civilisation and being themselves the children of the European Enlightenment. At the same time, accession to European Union has always been seen as a shield against external threat and internal political instability. Without this kind of political support, the European dimension in education would perhaps not have stood the same chance of success. And without such understanding on their part, study visitors examining the European dimension in Greek schools will not obtain the useful lessons and experiences they seek.

By the same token it would be difficult to appreciate fully the success of policies related to educating immigrants and refugees in Greece and to draw useful lessons from them without considering that almost half of the Greek population is descended from Greek refugees from Asia Minor in 1922 and that Greeks have shared the pains of emigration for many generations.

A final example is of value. Despite some progress, ICT has not yet been successfully introduced to Greek schools. A study visit will perhaps reveal some of the obstacles and difficulties. These would perhaps be related to state administrative inertia, to the inadequate initial and continuing training of teachers or to the lack of proper infrastructure. Yet a fuller and a clearer picture, from which to draw useful lessons, is not possible without also appreciating the relevant intellectual and ideological factors that underpin Greek education.

For historical reasons, Greek education has been traditionally devoted to the cultivation of the mind and of the moral sense. Theoretical rather than practical knowledge was considered genuinely worthwhile, and teachers have learned over the years to reflect this in their work. For technology to establish a foothold in the curriculum it must not only overcome institutional obstacles but also change traditional school culture.

Some in optimistic and enterprising reformist circles would object to this emphasis on the role of tradition and of social and cultural forces. Their argument is that education today is basically about skill provision, adaptability and flexibility in a rapidly changing, chaotic, globalised world; it is about individualism and cultural preference, about



*vivere* rather than *philosophare*. States and individuals, so the argument goes, which tend to ignore the realities of globalisation, of the technological explosion in information technology and biology, of the multicultural character of post-modern societies and of cultural relativity, of the decline of the nation state and of the downfall of the enlightenment, and which in general fail to appreciate the omnipotence of international forces and the inevitability of the changes they imply, are likely to end up at the fringe of world society and the rearguard of history. Hence there is persistent and pressing advice to educators to go with the flow - and taunts against those who fail to comply.

The answer to such remarks is twofold. The first point is that these accounts of international forces and of their corollaries are simply inaccurate. The nation state remains strong and the sole frame of reference for the political legitimisation of supranational formations (Mattheou, 2001), despite some losses in its economic and political responsibilities. Globalisation, disputed and detested on various grounds, is neither a new nor an all-embracing phenomenon (Hirst and Thomson, 1996; Ashton and Green, 1996). Contemporary technological explosion, though impressive and perhaps of unprecedented strength, is but yet another step in the long series of similar explosions, which have yet to make their creative impact felt all over the world.

The second point is that most of the aforementioned arguments are a-historical, positivistic and to some extent deterministic. They do not take into consideration people's capacity to reject and confront supposedly omnipotent forces and their willingness to give direction to history. The long intellectual history of the European continent speaks for itself as to the dialectical character of history and of human progress. And Europe's great contribution to the world's civilisation has demonstrated beyond doubt the significance of active political involvement in the writing of history.

### **Preparing study visits in a comparative perspective**

Translating theory into practice is undoubtedly a difficult task; a course in aeronautics and the plane's manual are certainly not enough to make a safe flight. By the same

token, comparative education provides the guidelines to make study visits more effective; it cannot exorcise the evils of misunderstanding altogether. It is in this spirit that the following remarks should be understood and considered.

A study visit is basically an act of communication and, for the purpose of improving its effectiveness, it should be regarded as such. The visitor gets in touch with a number of people working in or related to an organisation and/or an institution. They are supposedly ready to satisfy his/her interest by explaining the situation and by providing answers to his/her queries. In reality they send out an encoded message in accordance with their assumptions as to what the interests of the visitor are and what they themselves consider fundamental in and representative of their organisation or institution. In this respect the hosts make use of certain concepts that are familiar to them - and expected to be familiar to their visitors - while on some occasions they take contextual aspects of their message for granted.

Visitors interpret - or in a more technical sense, decode - the message in accordance with their own assumptions, conceptual background and personal preferences and interests. As visitors come from different national and/or cultural backgrounds, the variety of their assumptions, interests and conceptual contexts lead them to different interpretations of the message; they understand the situation differently.

Finally, a double administrative layer is responsible for bringing the visitor and the visited together: the host authorities decide what programmes to offer and organise study visits, while the visitors' authorities select applicants in accordance with certain criteria, provide background information prior to the visit and receive reports after that the event. Both layers are of great significance in the communication process. In deciding the 'sender', the 'receiver' and the topic, they decide, to a great extent, the message and its interpretation.

Having analysed the participants in the communication process we can now pass on to the description of the phases of a study visit and pinpoint the areas in which comparative education may help. For analytical convenience, we divide the process into five



distinct phases. First is the selection of the theme, the content and the structure of the study visit by the host authorities. Second is the selection of prospective visitors in accordance with certain specified criteria. Third is the preparation and support of prospective visitors by the visitors' authorities. Fourth is the visit itself, which includes both visitors and a number of hosts, selected by the host authorities, again in accordance with certain criteria. Reporting back, both to the visitors' authorities and to a broader audience of educationalists, is the final phase.

Phase one is largely dependent on two determining factors. Study visits should respond to the specific priorities of the Socrates/Leonardo Programmes and to the realities of education in contemporary Europe; they should also take into consideration what the host country can offer. Although most education problems and policies are quite similar for EU countries - the inescapable outcome of, among others, the forces of globalisation, European integration and the knowledge society/economy - there are certain education issues peculiar to the various countries in terms of either prevailing circumstances or the innovative character of adapted policies. The transformation of educational institutions in the ex-communist European countries - under circumstances certainly peculiar to them - and the policies of managerialism in British schools - an innovation consistent with British organisational traditions - come under this category. Thus the distinction between 'similar' and 'specific' problems/policies raises questions of the relevance of the topic of a study visit to foreign educators (especially when it comes to specific circumstances) and it certainly places different demands on visitors as to their knowledge of the prevailing circumstances in the host country. A Greek educator, for example, would wonder whether studying the local management in an English school is relevant to him, since he works in a highly centralised education system. Should he find this study visit theme interesting, he would have to learn more about the decentralised traditions of English schooling, about the professionalism of English teachers, about the liberal character of English politics, about public faith in scientific management, etc., than if he had to study, say, special needs education.

Comparative education can provide the means to distinguish between the similar and the

peculiar - from the beginning this has been one of the main aims - and to reveal the character and the relevant significance of similarities and of peculiarities in policy-making. This is a contribution of obvious importance to selecting and structuring study visits. Provided that authorities do not offer to visitors what is simply startling and at hand only to meet their conventional obligations, and that they possess the necessary comparative expertise, they can select a theme and organise the study visit around it to underline the important contextual elements of the policy and to stress the peculiar vis-à-vis the similar. By the same token - because even within a society there are always different perspectives and points of view - host authorities should allow for adverse/minority views to be presented as well as for defective institutions also to be visited and observed. This will not only provide a more comprehensive and accurate understanding of the situation but will also raise the level of creative confusion on the part of visitors which, as a core element of genuine interest and of participatory involvement, will lead to a deeper and a more accurate understanding of the situation; this is, after all, the ultimate goal of the visit. The first phase is not merely a matter of organisational and procedural technicalities. It lays the foundations for a successful study visit. At this level, therefore, national/regional authorities should not hesitate to ask for help from comparative education experts and to cooperate with their counterparts abroad.

The second phase is the responsibility of the visitors' authorities. They normally select prospective visitors on the basis of language skills (they should speak the language of the study visit at an advanced level), of their interest in or pertinence to the theme and of their rank in the education hierarchy. While these criteria cannot be faulted, they are not sufficient. Since a study visit is a communication exercise in which observation, decoding and understanding really depend on the visitors' conceptual context, their value system, their assumptions about good education, their real motivation, etc., authorities should get a more comprehensive and accurate view of the prospective visitors' profile. Experience has shown that, for some educators, participation in a study visit is merely a matter of curiosity or an opportunity to travel abroad and to meet other people (a useful thing in itself but not a top pri-



ority in the relevant programmes). For others, internalised predispositions prevent them from fair observation. There are always those who, for example, see in the German system of technical-vocational education the perfect model, or those adherents of encyclopaedism who despise the essentialist GCE-A level curriculum and who are inclined to look only for evidence supporting their prejudice. Profiling prospective visitors on the basis of certain descriptive qualitative characteristics is a useful exercise and a prerequisite for the next phase.

The third phase, lies at the heart of the process; during this phase prospective visitors are coached for a successful visit. Relying on detailed and accurate information about the theme, the content and the structure of the study visit - information passed on from host to home authorities during the first phase - and having established individual profiles (phase 2) authorities are now in a position to organise ad hoc seminars which could include short courses on the comparative study of education. Irrespective of the specific study visit theme, all prospective visitors should be warned against the pitfalls of biased observation, of decontextualising issues, of confusing the general with the peculiar, of ignoring the significance of circumstances and traditions, and so on. Case studies from the extensive bibliography of comparative education on misunderstandings and misjudgements which led to real blunders in policy making could be of great help. Visitors could also be given background information about the host country education system and its socio-economic, cultural and political context, not in a piecemeal manner but in a systematic way, which would allow the prospective visitor to appreciate existing relationships between the observed institution, on the one hand, and the intangible forces and the realities of life that influence its function, on the other. It is only in this form that information about the host country or about one of its institutions - normally provided in other ways by home and host authorities today - makes real sense and becomes useful. These short courses could culminate in developing a flexible general flow-chart or observation grid that could allow the participant to focus only on the important institutional aspects, to discriminate the general from the peculiar, to appreciate the innovative and the useful and so on.

There could also be short courses that would update prospective visitors (for the novice in the field this might be a preliminary introductory course) on the latest developments, both in scientific and in policy-making terms, of the field in which the study visit theme belongs. This is of crucial importance mainly in newly developed interdisciplinary areas like ICT education, special needs education, or multicultural education, especially in countries where relevant experience and expertise is limited. A final course could also aim at coaching prospective visitors in communication techniques and overcoming the difficulties related to applying these techniques, especially at the international/cultural level where communication codes normally differ. As examples of the cultural character of these codes, 'private education' excludes state financial involvement for the Greek, something which is certainly not the case for Western Europeans, while 'secular education' bears different connotations in France, Ireland or Greece.

The fourth phase refers to the actual visit, where the quality and the efficiency of the previous planning and preparation activities are tested. This refers to the structural and organisational aspects of the visit, to the personnel involved, to the selection of the sites and/or the events of the visit, to time management, etc., all of which set the scene for a successful study visit, as well as for its educational quality and its usefulness in policy-making terms. It is worth emphasising the central role of the personnel involved. As key figures in the communication process, they should be fully aware of the significance of coding, their own and that of their visitors, and thus prepared to be continuously in tune with their visitors' interests and modes of thinking. It is essential that the whole visit process should be systematically evaluated both by hosts (authorities and participants) and by visitors on the basis of agreed objectives and criteria and that, to this end, every valid and reliable instrument of evaluation be used.

Finally, the conclusions of the evaluation should be recorded on a structured, well-documented report. The different perspectives will reveal misunderstandings and weaknesses as well as the strong points of study visits that could then be used for the continuous improvement of the whole programme.



At least two major reservations and/or objections to the above process might be expected. The first relates to the amount of effort demanded from all agents and persons involved (authorities, educators, host institutions, organisers). The second concerns the lack of expertise on their part, especially in profiling, comparative education and communication techniques, and project evaluation. While the process described is demanding, it is important to set policy priorities right. Maximising the results of a highly appreciated - and quite expensive - action is worth a greater effort. After all - to answer the second objection - the whole project in its proposed new form counterbalances the additional workload with the involvement of expert human resources and with the introduction of a more rational and efficient organisation structure, which excludes duplication of effort and maximises state functional assets. Thus, administrators will continue their organisational and coordinating work and visitors will keep reporting, but in a more structured and systematic way. Profiling, seminars in comparative education and in communication techniques will obviously be the realm of experts (e.g. academics) from the relevant fields. Together they are expected to bring coherence and efficiency to the system and bring it closer to the expectations of the founding fathers of study visit programmes.

## Coda

Learning from others in education through study visits and direct observation has a long history. It has always been comforting to expect that you may avoid mistakes and make safe decisions in educational policy-making by simply following in the footsteps of others and by taking advantage of their experience. This expectation is even stronger today as we endeavour to integrate Europe and deepen our understanding of each other. Yet the exercise has not always been successful. Education institutions are far too complicated in themselves and closely interwoven with society to allow for an easy and clear understanding on the part of its students.

Comparative education may be of help in this respect both by raising awareness of the importance and the pitfalls of the task and by providing the proper approaches and techniques for its successful accomplishment. This implies reconsideration of the procedures followed thus far in the several EU study visit programmes as well as of the active involvement of other agents and experts that would be prepared to work in close cooperation with administrators and educators. No matter how difficult the proposed new arrangement may seem at first sight, it is worth trying. International understanding is the bedrock of continuous peace and prosperity, the ultimate goals of European integration.

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## Key words

Decision making, education system, national context, education policy, foreign institution, school culture.





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### **Åsa Murray**

*Associate professor in education, Stockholm Institute of Education, Department of Human Development, Learning and Special Education*



### **Anders Skarlind**

*Statistician, Stockholm Institute of Education, Department of Human Development, Learning and Special Education*



# Does vocational training matter for young adults in the labour market?

## Background

Following the implementation of a compulsory nine-year comprehensive school in Sweden during the 1950s and 1960s, upper secondary education was reformed in the early 1970s. Two-year continuation schools and vocational schools were merged with the traditional gymnasium to form the new comprehensive upper secondary school. Vocational training programmes were re-organised as two-year upper secondary courses which also included some general education. Upper secondary school gradually encompassed ever larger groups of young people. In the 1980s, the educational goal of creating "one upper secondary school for all" was adopted, which aimed at ensuring that all young people moved on to upper secondary school. This continues to be an objective of Swedish educational policy. Almost all educational policy documents regard a completed upper secondary education as an essential requirement for a person to be able to compete in the labour market, and the most recent official report on the current state of upper secondary education in Sweden (Åtta vägar till kunskap, 2002) is no exception. In this respect, Sweden has followed a general trend prevalent throughout the European Union where enrolment in post-compulsory education has become increasingly common (Murray and Steedman, 2001). During the 1990s a new reform of upper secondary education was carried out. In this context, the two-year vocational courses were extended and developed into three-year programmes. Moreover, the standards of the academic subjects were raised. Also in other countries of the European Union, vocational training programmes have been reformed so as to become less oriented towards specific occupations (Lasonen, 1996).

The political objective of creating one upper secondary school for all has by no means escaped criticism. Which particular feature is it that makes this educational pathway so indispensable? Is it the actual vocational knowledge acquired or rather the knowledge acquired in the general subjects that is essential? These, according to Hill (1998), are questions that are rarely asked when young people's education and training is discussed.

According to Pettersson (1997), there ought to be an alternative pathway to competence for young people in Sweden alongside upper secondary school. Spending years on end in school can be a situation perceived as hopeless by those who find it difficult to adjust to the school's demands. Therefore, a labour market for young people should be re-established to provide an alternative to upper secondary school (Pettersson, 1997).

The political objectives of delivering an ever longer education to more and more young people have also been challenged by researchers focused on "overeducation". According to Wolf (2001), politicians tend to be overoptimistic as to the economic returns for society ensuing from a higher educational level of the workforce. There are still, and still will be for the foreseeable future, a large number of occupations which hardly require any qualifications other than compulsory schooling. Although the proportion of jobs with low qualification requirements has indeed declined in countries such as Sweden, the UK, the Netherlands and the United States, this change has been less dramatic than what many people seem to assume (Wolf, 2001; Åberg, 2002). At the end of the 1990's, around 30 per cent of jobs in Sweden, the UK and the Netherlands and 40 per cent of jobs in the United States did not require any particular qualifications. The

**The impact of vocational training on employment and income is investigated for young adults. Young adults without further education and training are compared to young adults with two-years and young adults with three-years of vocational training. The sample consists of 41 000 Swedish young adults born in 1974. The employment of these young adults was monitored from the age of 16 to 24. Their employment at age 24 was analysed by logistic regression and their income with linear regression controlling for gender, ethnic background, school achievement at age 16 and local unemployment. The results show that young adults with vocational training were employed significantly more often and they had significantly higher income than those without further education and training. The effect of a third year of vocational training was small and it was valid for only those with high or ordinary school achievement.**



change in the proportion of low-qualified jobs was strikingly similar in these countries, despite differences in tax burden and the degree of international dependence (Åberg, 2002). Åberg (2002) also found that overeducation had become more widespread in Sweden, particularly during the 1990s. Among those holding positions with low educational requirements, the percentage of persons who had completed upper secondary education had increased from 10 per cent in 1975 to 30 per cent by the year 2000. The deterioration of the labour-market situation for low-qualified people in Sweden, not least among young adults (Edin et al., 2000; Schröder, 2000; Ekström and Murray, 2002) during the 1990's can be explained by the fact that they have been supplanted by people with upper secondary qualifications, rather than there being a shortage of jobs with no special qualification requirements (Åberg, 2002). Green et al. (2002) found that one out of five people in the British labour force were undereducated in the 1990s, while around one third were overeducated. In contrast to Sweden, this proportion rose only marginally from the mid-1980s until the late 1990s, despite an increase in the supply of highly educated labour, according to Green et al. (2002). The labour market had thus, to a large extent, absorbed the increasingly better educated workforce.

### **Why conduct a new study of young people with no upper secondary education?**

The latest reform of upper secondary school has raised the educational level of the majority of young people; at the same time, however, the number of young people without upper secondary qualifications has increased somewhat. At least the attainment of an upper secondary education has been delayed by one more year for many young people (Elevpanel, 2003, p. 7). Before the reform of upper secondary education was passed, large scale pilot schemes involving three-year vocational courses were carried out (Utvärdering av försöksverksamhet, 1989). Individual municipalities applied for participation in the pilot scheme, usually on the initiative of a single upper secondary school. Thus, it was not the individual pupil who chose whether or not to take part in the trial; rather, the schools participating in the pilot scheme offered only three-year courses for certain vocational training programmes. Nevertheless, the students did have some options. They could

opt for a different programme, or, in some cases, enrol on the corresponding two-year course in a different municipality. Considering how selective the choice of upper secondary education programme normally tends to be, the trial can be regarded as a natural experiment. The students who completed a three-year vocational programme differed very little from those who took the corresponding two-year course (they had quite similar grades from compulsory school and the proportion of immigrants was similar as well). During the first year of the trial, i.e. in 1988, almost 6 000 students took part in the three-year vocational programmes; in the second year, this number had risen to 10 000, and in the third year, to 11 000. This means that, for a number of years, both young adults with a two-year vocational upper secondary education and young adults with a three-year vocational upper secondary education entered the labour market at the same time. However, the number of young adults with vocational training did not increase during these years. The proportion of 20 year olds with vocational training was constant from 1992 to 1997 (Elevpanel, 2003 p. 9) and the number of 20 year olds decreased during this period (Statistical Yearbook of Sweden '98 p.38).

We shall take advantage of the pilot scheme in the following study. The young adults whom we intend to study here were born in 1974 and left compulsory school in 1990 at age 16, just as 98 per cent of this cohort did. Table 1 shows which level of education this age cohort attained during the period from 1994 to 1998, i. e. from age 20 to 24.

Table 1 shows that those who had no upper secondary education in 1994 to a large extent continued to lack such qualifications four years later as well. Their proportion only declined from 13 to 12 per cent. Thus, young people who did not complete upper secondary education more or less directly after finishing compulsory education acquired upper secondary qualifications only to a very limited extent while they were young (i.e. before the age of 25). Young people who had completed a two-year upper secondary education did not participate in further education to a great extent either. The proportion of those who had completed a two-year upper secondary education, most of whom had completed a vocational programme, declined from 27 to 24 per cent. In contrast, young people who had completed a three-

**Level of education attained, 1994 to 1998, for young people born in 1974. Per cent.****Table 1**

Level of education attained	1994 age 20	1995 age 21	1996 age 22	1997 age 23	1998 age 24
Compulsory school or lower	13	13	12	12	12
Upper secondary education, up to 2 yrs.	27	26	25	24	24
Upper secondary education, 3 yrs.	52	47	41	37	34
Post-secondary education	8	15	22	26	30
Total	100	100	100	100	100

Source: Statistics Sweden, Swedish Register of Education, own calculations. (Unfortunately, the database from which the data are derived contains no information as to whether the upper secondary education was vocational or academic.)

year upper secondary education, most of whom had pursued an academic programme, to a large extent moved on to post-secondary education. The proportion of those who had completed a three-year upper secondary education decreased from 52 per cent in 1994 to 34 per cent in 1998.

### Aim

The aim of the following study is to examine how well young adults with and without vocationally oriented upper secondary education have managed to establish themselves in the labour market after leaving school. Does vocational training matter? Both young adults with a two-year or three-year vocational upper secondary education and young adults with no upper secondary education will be examined.

The research questions are:

To what degree have the young adults succeeded in finding a job in the regular labour market during the investigated period?

What effect has a two- and a three-year vocational upper secondary education on employment and income at age 24, controlling for background factors?

### Method

To examine the transition from school to work, it is important to monitor them over a number of years. The following study will monitor young adults from the same age cohort born in 1974 who left compulsory school in 1990 at age 16 up to age 24 (1990-1998). Data is collected from various registers of the total population kept by Statistics Sweden (the Pupil register, the Register of Higher Education, the Swedish Register of Education, and Labour statistics based on admin-

istrative sources). Most young people have completed their upper secondary education at age 20 (table 1). That is why we have chosen 1994 as our point of time for measuring the educational attainment of the investigated young adults. The following investigation groups have been selected: <sup>(1)</sup>

- young adults who, in 1994, i.e. four years after leaving compulsory school, were still lacking an upper secondary education (no upp. sec. ed.);
- young adults who had moved on to a two-year vocational course in upper secondary school in 1990 and had completed this type of education by 1994 at the latest (2 yrs. voc. ed.);
- young adults who had moved on to two-year vocational courses in upper secondary school in 1990 and had added a supplementary year to their education so that they had completed a two-year vocational upper secondary education plus one supplementary year by 1994 (2+1 yrs. voc. ed.). The character of the supplementary year is not documented. It is probably varying between municipalities and schools;
- young adults who had moved on to three-year vocational courses in upper secondary school in 1990 and had completed this type of education by 1994 at the latest (3 yrs. voc. ed.) This group have a more academic education than the group who have a two-year education and probably also than the group who have added a supplementary year to their two-year education.

The situation of young people and young adults in the labour market can be measured in various ways. Employment rates constitute a better measure of how well young in-

<sup>(1)</sup> The corresponding categorical variable we call 'educational attainment'



dividuals do in the labour market than unemployment rates, since many young men and women alternate between periods of unemployment, study and participation in job-creation schemes (Åberg, 2002). We have looked at employment rates from November 1990 to 1998 as it was the measurement available.

We have investigated young adults' employment in the various investigation groups, descriptively for the entire period from 1990 to 1998, broken down by gender and also by means of logistic regression (Christensen, 1990). We model the likelihood of being employed in November 1998. In addition log annual income in 1998 is modelled by linear regression.

Since educational attainment is correlated with young people's background and ability, it is important to control for these factors when trying to assess the value of a vocational upper secondary education in the labour market. Final grades from compulsory education (at age 16) have been found to be highly related to social background and ability and the best variable to predict educational attainment (Härnqvist, 1993 p. 67). The final grades used here as a control variable are the average overall grades obtained at the end of compulsory education in 1990. The grades have been divided into three categories: low (1.0 to 2.3), ordinary (2.4 to 3.1) and high (3.2 to 4.8). <sup>(2)</sup> Young people who lack grades in one or several subjects at the end of compulsory schooling have been classified as belonging to the low-grade category. <sup>(3)</sup> Each category contain a considerable proportion from each investigation group.

Previous research has also revealed a relationship between young adults' ethnic background and how well they did in the labour market of the 1990's (Arai et al., 2000; Vilhelmsson, 2000; Edin et al., 2000), which is why this factor needs to be controlled for. 'Ethnic origin' (or 'ethnic background') is here a dichotomous variable: born in Sweden or born abroad.

The control variable 'municipal unemployment rate' is the percentage of the labour force who were out of work (i.e. the relative rate of unemployment) in the home municipality of the young adult in 1998. For a number of additional details on the regression analyses, see the relevant footnote <sup>(4)</sup>.

Those young adults who were in higher education have been excluded from the presented results, since they did not form part of the active labour force. They account for 5 to 8 per cent of the investigation groups. Furthermore, all individuals who have missing values on any one of the variables used in any of the logistic regression analyses (employment analyses) have been excluded from all logistic regressions. An analogous principle applies to the linear income regression analyses (income analyses).

The income analyses further comprise only those respondents who are considered to have been gainfully employed during 1998 to a more than insignificant extent. We have tried to achieve that the incomes used for the income analyses would not be too contingent on the degree of occupation by excluding those who were not gainfully employed at all in the course of 1998 or were so only to an insignificant degree. Since we do not have any direct information on the degree of occupation, we have chosen to base our criterion on annual income instead. By setting the limit at SEK 37 400, we exclude 24 per cent of those who otherwise meet the requirements for being included in the income analyses. This proportion, 24 per cent, has been chosen because it equals the proportion of individuals who were not employed in November 1998, i.e. the proportion of those who do not meet the criterion of employment used in the employment analyses. In 89 per cent of cases, those who had an annual income of less than SEK 37 400 in 1998 and those who were not employed in November 1998 are the same persons. We thus have relatively well-corresponding limits in our income and employment analyses.

### Description of the data material

The size of the investigation groups in 1994 and 1998 is shown in table 2. The groups remained fairly constant from 1994 to 1998. An inspection of the first four columns reveals that the loss of data due to missing values was negligible in 1994 and 1998.

The number of observations used in the regression analyses is shown in the two columns to the right. The smaller number of observations in these columns is due to exclusion of university students and persons with low income, as explained above.

<sup>(2)</sup> Swedish school grades were in 1990 awarded on a scale from 1 to 5, with 5 being the highest possible grade.

<sup>(3)</sup> In the Swedish school system at this time, pupils were on some conditions, mainly too low attendance, not given any grade at all in the course or subject in question.

<sup>(4)</sup> **Details on the regression analyses:** We have elaborated regression models in a hierarchical order, including 1, 2, 3, 4, and 5 explanatory variables respectively. We entered gender as the first explanatory variable and then, step by step, added ethnic origin, grades in the 9th year of compulsory school, the municipality's unemployment rate and, finally, upper secondary education. The order of the variables is based on assumptions as to which of these are more primary causes (these are entered first) of a person's employment status. Furthermore, as upper secondary education is added last, we can examine its effect controlled for the other variables. We have also taken interaction effects into account. For example, an interaction between upper secondary education and grades in a logistic regression model means that upper secondary education has a different effect on the likelihood of being employed depending on what grade a person has achieved. For each new explanatory variable we have added a complete set of interactions with respect to the effects that were accepted in the previous model and subsequently eliminated all interaction effects that were not significant. This results in one accepted model for each set of explanatory variables. In total, we have produced five models, models 1 to 5, of which only the final model (model 5) is presented here.



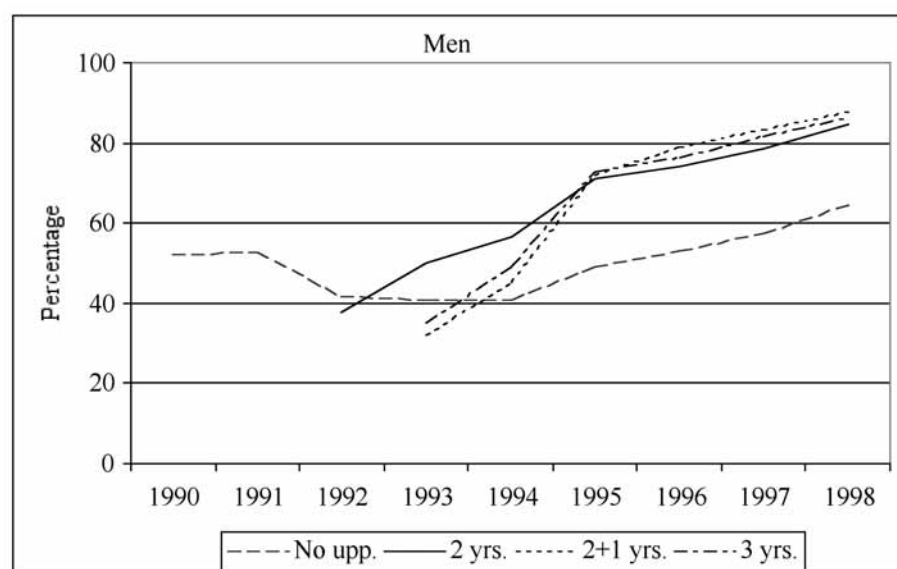
**Size of the investigation groups in 1994 and 1998.**

**Table 2**

Investigation groups	Size in 1994	Size in 1998	Number with all var's valid in 1994	Number with all var's valid in 1998	Number included in logistic regression analyses	Number included in income regression analyses
No upper secondary education	11 815	11 620	11 811	11 607	11 033	6 293
Two-year vocational education	17 422	17 255	17 416	17 228	16 319	12 864
Two-year vocational education plus one supplementary year	8 341	8 254	8 330	8 240	7 634	6 402
Three-year vocational education	7 341	7 253	7 337	7 245	6 629	5 457
Total	44 919	44 382	44 894	44 320	41 615	31 016

**Proportion of men gainfully employed in November 1990 to 1998 among men with no upper secondary education and men with a two-year or three-year vocational education.**

**Figure 1**



When these young men left compulsory school in 1990, unemployment was still low. It was nonetheless difficult for 16-year-olds with no upper secondary education to find a job. Figure 1 shows that only one in two succeeded in finding a job in the first two years after leaving compulsory school. When unemployment began to rise, the proportion of gainfully employed dropped to almost 40 per cent in 1992 and remained invariably low for another two years. Military service may be another reason for the declining proportion of young men in gainful employment. In spite of the fact that unemployment was still high in 1995, employment rates gradually began to increase among men with no upper secondary education, rising to 64 per cent in 1998.

As early as in 1993, i.e. one year after leaving upper secondary school, men who had completed a two-year vocational upper secondary education had a higher employment rate than men with no upper secondary education. Subsequently, the employment rate of men with a two-year education increased faster than that of men with no upper secondary education for another two years. Men who had completed a three-year vocational upper secondary education also had a higher employment rate than men with no upper secondary education one year after leaving upper secondary school. During the following years their employment rate continued to rise sharply, reaching the same level as that of men with a two-year education. However, from 1995, employment rates increased at the same pace for all four groups of young men. A corresponding comparison of employment rates for women is presented in figure 2.

Figure 2 shows that women who had no upper secondary education experienced even greater difficulties in the labour market than men who lacked an upper secondary education. When unemployment went up, the

The proportion of individuals born abroad was 7.6 per cent among young adults who had no upper secondary education, but it was lower (3.9 to 4.1 per cent) among young adults who had completed vocational upper secondary education. Young adults lacking an upper secondary education were also more likely to have low grades than young adults who had completed this type of education.

**Results**

**Transition from school to work**

The rates of transition to the labour market for men with no upper secondary education and men with a two-year or three-year vocational education can be seen in figure 1. It shows the proportion of individuals who were gainfully employed in November of each year.

We have used SAS for all calculations. For the logistic regression analyses we have used proc genmod, proc nlmixed and the glimmix macro (Changes and Enhancements, 1996; Version 8, 1999). For the linear regression analyses we have used proc mixed. Two-level models with random components at the individual and municipal levels have been applied in glimmix, proc nlmixed and proc mixed. The odds ratios in tables 3 and 4 have been calculated in proc nlmixed.



proportion of women who were gainfully employed dropped from 48 per cent in 1990 to 31 per cent in 1994. Just as for the men, employment rates gradually began to increase in 1995. Figure 2 also reveals differences in employment rates between women with and without upper secondary qualifications. Already in November of the year in which they left upper secondary school (i.e. in 1992 and 1993 respectively), the employment rate of women who had completed vocational upper secondary education was somewhat higher than that of women with no upper secondary education. In 1994, the gap between women with and without upper secondary qualifications widened even further. After that, from 1995 to 1998, the difference between the groups compared remained fairly constant.

### The effect of vocational training on employment

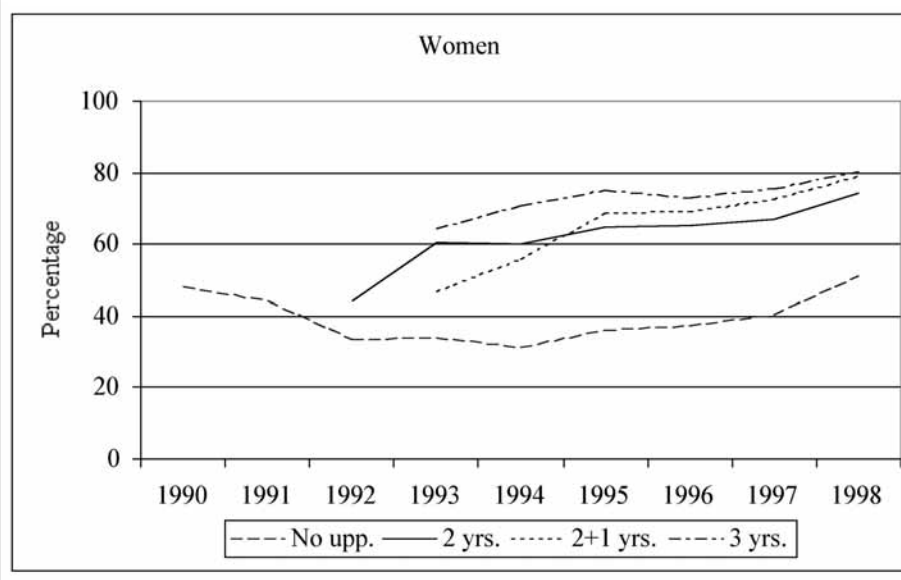
We analyse how young adults' employment in November 1998 relates to their educational attainment, controlled for gender, ethnic origin, final grades from compulsory school and the home municipality's unemployment rate in 1998. When interpreting the results, one needs to bear in mind that a large variety of vocational upper secondary programmes have been subsumed within each educational category.

We have found a significant difference in the likelihood of being employed between men and women. The odds ratio between women's and men's employment is 0.54 (95 per cent confidence interval 0.52-0.57). The corresponding probabilities of being employed are 0.81 for men and 0.70 for women. These results are referred to as model 1. Hence, women have a considerably lower employment rate than men.

In three steps, which shall not be described here, we added the explanatory variables ethnic origin, final grades from compulsory school and local unemployment (models 2, 3 and 4). The effects of these variables are nevertheless apparent in the final model (model 5), in which we ultimately added educational attainment as an explanatory variable. We compare the employment rates of young adults with no upper secondary education with three vocational education alternatives: two-year, two+one-year, and three-year, controlled for the other variables. The Annex <sup>(5)</sup> contains an analysis of vari-

**Proportion of women gainfully employed in November 1990 to 1998 among women with no upper secondary education and women with a two-year or three-year vocational education.**

**Figure 2**



ance summary table listing tests of various effects in the final model.

All the main effects in the final model (gender, ethnic origin, grades, municipal unemployment rate and educational attainment) are strongly significant. Gender interacts significantly with three variables: ethnic origin, final grades from compulsory school and the municipal unemployment rate. It is therefore advisable to break down the presentation of odds ratios into partial models <sup>(6)</sup> for men and women. The odds ratios are applicable within each partial model, so that men are compared to men and women to women. For either partial model we have a reference group, consisting of men or women, respectively, with ordinary grades and a two-year upper secondary education.

Furthermore, educational attainment interacts significantly ( $p=0.0002$ ) with final grades, i.e. the relation between the employment rate and educational attainment varies between grade groups. Therefore, odds ratios are specified for all combinations of grades and educational attainment within each partial model, see table 3.

The following essential characteristics shown in table 3 apply to both men and women:

- a high employment rate is typically displayed by young adults with high grades and an upper secondary education as well as by

<sup>(5)</sup> See Table 6 in the Annex.

<sup>(6)</sup> The partial models are so-called conditional models. We have one single final model and work out what this model tells us given (in other words, conditioned upon) the gender of the person in question. (A roughly equivalent alternative would be to work out two separate models for women and men respectively. This should produce approximately the same result. However, it is necessary to have men and women in the same model to be able to test the differences between them.)



**Odds ratios (95 per cent confidence intervals) for young adults being gainfully employed by gender, ethnic origin, grades, municipal unemployment rate and educational attainment (model 5).** **Table 3**

	Partial model for men	Partial model for women
<b>Average grades and educational attainment</b>		
<i>High grades</i>		
No upper secondary education	0.43 (0.37-0.49)	0.57 (0.50-0.64)
2-year vocational education	1.27 (1.12-1.43)	1.69 (1.51-1.87)
2+1-year vocational education	1.62 (1.38-1.87)	2.15 (1.83-2.48)
3-year vocational education	1.47 (1.25-1.68)	1.95 (1.69-2.21)
<i>Ordinary grades</i>		
No upper secondary education	0.45 (0.41-0.49)	0.45 (0.41-0.49)
2-year vocational education	1	1
2+1-year vocational education	1.18 (1.07-1.30)	1.18 (1.07-1.30)
3-year vocational education	1.31 (1.16-1.46)	1.31 (1.16-1.46)
<i>Low grades</i>		
No upper secondary education	0.27 (0.24-0.29)	0.26 (0.23-0.28)
2-year vocational education	0.66 (0.58-0.73)	0.63 (0.56-0.71)
2+1-year vocational education	0.96 (0.78-1.14)	0.93 (0.75-1.11)
3-year vocational education	0.71 (0.58-0.85)	0.69 (0.56-0.83)
<b>Ethnic origin</b>		
Born in Sweden	1	1
Born abroad	0.37 (0.32-0.42)	0.55 (0.48-0.62)
<b>Unemployment rate of the municipality in 1998</b>		
Per percentage point of higher unemployment*	0.85 (0.82-0.88)	0.93 (0.90-0.96)
<p>Note: If the number 1 is not within the confidence interval, there is a significant difference at the 5 per cent level as compared to the reference categories men and women with ordinary grades and a two-year upper secondary education.</p> <p>* The reference categories for different education groups and genders are municipalities with an unemployment rate that is one percentage point lower, ceteris paribus.</p>		

(?) They are, of course, not identical in reality, but are indeed so close that the difference between them disappears in the idealised situation represented by the model. Mathematically, this is due to the fact that a number of terms cancel each other out when forming (logarithmic) odds ratios. For ordinary grades, this results in the same remaining terms for log odds of the same type (e.g. no upper secondary education/two-year upper secondary education) for both men and women. This, in turn, can be attributed to the interactions that are significant according to Table 6 in the Annex.

young adults with ordinary grades and three years of upper secondary education;

□ an ordinary employment rate is typically displayed by young adults with ordinary grades and a two-year or a two+one-year upper secondary education as well as by young adults with low grades and a two+one-year upper secondary education;

□ a low employment rate is typically displayed by young adults with low grades and a two-year or a three-year upper secondary education.

□ a very low employment rate is typically displayed by young adults with no upper secondary education, particularly those who have low grades.

The following fundamental features, on the other hand, are gender-specific:

□ women seem to benefit more from high grades than men;

□ young adults born abroad are far less likely to be employed than young adults born in Sweden; this difference is particularly marked among men (odds ratio 0.37);

□ quite naturally, a high unemployment rate in the municipality has a negative impact, and in this respect, men seem to be more vulnerable than women (odds ratio 0.85 as compared to 0.93), probably because men more often than women are privately employed.

The differences in patterns between men and women in table 3 are moderate, except with regard to ethnic origin, the effect of high grades, and, to a certain extent, the impact of the municipality's unemployment rate. The main difference between the two genders is their different rate of employment. For young adults with ordinary grades, the partial models for men and women are actually identical when it comes to the impact of grades and educational attainment. (?)





The most interesting type of comparison for our purposes is to compare the investigation groups within each grade category. For young men and women with ordinary grades, appropriate odds ratios are listed in table 3. For both men and women, the following results are found (as mentioned above, these are identical in the model):

□ those who lack an upper secondary education have a considerably and significantly lower employment rate than those who have completed an upper secondary education;

□ those who have completed a three-year or two+one-year upper secondary education have a moderately, yet significantly higher employment rate than those who have completed a two-year upper secondary education.

In order to facilitate comparisons within the low and high grade groups, respectively, the odds ratios have been recalculated using reference categories within each group; see table 4. Those with two years of upper secondary education within each grade category have been used as reference categories. The ratios calculated on the basis of model 5 are the same for men and women and are therefore presented together. (\*)

The results for young adults with high grades (table 4) are similar to the results for those with ordinary grades:

□ those with no upper secondary education have a considerably and significantly lower employment rate than those who have completed upper secondary education;

□ those who have completed a three-year or two+one-year upper secondary education have a moderately, yet significantly higher employment rate than those who have completed a two-year upper secondary education.

For young adults with low grades, the following results are found:

□ those who have no upper secondary education have a considerably and significantly lower employment rate than those who have completed upper secondary education;

□ those who have completed a two+one-year upper secondary education have a moderately, yet significantly higher employment

**Odds ratios (95 per cent confidence intervals) for employment by educational attainment, for young adults with high and low grades, respectively.**

**Table 4**

	Applies to both men and women born in Sweden and born abroad
<i>High grades</i>	
No upper secondary education	0.34 (0.29-0.38)
2-year vocational education	1
2+1-year vocational education	1.28 (1.08-1.47)
3-year vocational education	1.15 (1.00-1.31)
<i>Low grades</i>	
No upper secondary education	0.41 (0.37-0.45)
2-year vocational education	1
2+1-year vocational education	1.47 (1.18-1.75)
3-year vocational education	1.09 (0.88-1.30)

rate than those who have completed a two-year upper secondary education;

□ those who have completed a three-year upper secondary education, on the other hand, do not have a significantly higher employment rate than those who have completed a two-year upper secondary education.

Why young adults with low grades and two+one-year did better in the labour market than those with a three year education is difficult to explain. Perhaps they profited of a less academic education. It could also be an effect of selection. Motivated two-year students added a supplementary year.

#### **The effect of a third year in another recent study**

By controlling for background factors, we intend to diminish the effect of selection on our estimates of the effect of education. Yet, this method has its limitations. For instance, there may be factors not taken into account by us which could also affect the results. Examples of such factors include social background. If more background factors had been controlled for, the advantage of having completed an upper secondary education would probably have decreased, as would the advantage of a three-year education in relation to a two-year education. Ekström (2003), who compared inactivity (i.e. neither gainful employment nor participation in higher education) between young adults with a two-year and those with a three-year vocational upper secondary education, even found a positive effect on inactivity of a third

(\*) See the previous note. Essentially, the same explanation applies here.



**Ratios between geometric mean values (95 per cent confidence intervals) for young adults' incomes according to gender, ethnic origin, grades, municipal unemployment rate and educational attainment (model 5).** **Table 5**

	Partial model for men	Partial model for women
<b>Average grades and educational attainment</b>		
<i>High grades</i>		
No upper secondary education	0.93 (0.89-0.98)	0.94 (0.90-0.99)
2-year vocational education	1.05 (1.02-1.09)	1.07 (1.04-1.10)
2+1-year vocational education	1.12 (1.08-1.16)	1.13 (1.09-1.17)
3-year vocational education	1.08 (1.05-1.12)	1.10 (1.06-1.14)
<i>Ordinary grades</i>		
No upper secondary education	0.90 (0.88-0.93)	0.90 (0.88-0.93)
2-year vocational education	1	1
2+1-year vocational education	1.04 (1.01-1.07)	1.04 (1.01-1.07)
3-year vocational education	1.07 (1.04-1.10)	1.07 (1.04-1.10)
<i>Low grades</i>		
No upper secondary education	0.83 (0.81-0.86)	0.80 (0.77-0.83)
2-year vocational education	0.94 (0.91-0.97)	0.90 (0.86-0.94)
2+1-year vocational education	1.04 (0.99-1.09)	1.00 (0.95-1.06)
3-year vocational education	0.99 (0.94-1.04)	0.95 (0.89-1.01)
<b>Ethnic origin</b>		
Born in Sweden	1	1
Born abroad	0.82 (0.79-0.85)	0.91 (0.88-0.95)
<b>Unemployment rate of the municipality in 1998</b>		
<i>Per percentage point of higher unemployment*</i>		
No upper secondary education	0.959 (0.949-0.969)	0.970 (0.959-0.981)
2-year vocational education	0.965 (0.958-0.973)	0.976 (0.967-0.985)
2+1-year vocational education	0.961 (0.951-0.971)	0.972 (0.961-0.983)
3-year vocational education	0.978 (0.966-0.989)	0.989 (0.977-1.000)
<p>Note: If the number 1 is not within the confidence interval, there is a significant difference at the 5 per cent level as compared to the reference categories men and women with ordinary grades and a two-year vocational education.</p> <p>* The reference categories for different education groups and genders are municipalities with an unemployment rate that is one percentage point lower, ceteris paribus.</p>		

year. Ekström's study (2003) is based on the same register data as our present study and we use mainly the same explanatory variables. The differences in results are probably due to methodological differences. We use logistic regression and also investigate interaction effects extensively, which improves the fit of our models. Ekström (2003) has an econometric approach and uses linear regression without interaction effects combined with instrumental variable estimation. The pilot scheme is used as an instrument to remove the selection effects from the estimates. Another difference in methodology is that Ekström (2003) excluded students who had completed three-year programmes in the pilot scheme which did not have a corresponding programme in the regular two-year system and vice versa. To evaluate this potential source of varying results, we repeated our analyses excluding the same

programmes. However, this did not change our results. Finally, Ekström (2003) also uses the proportion of highly educated in the municipality as a control variable, which we did not.

### **The effect of vocational training on income**

We analyse how young adults' income from employment and self-employment during 1998 relates to their educational attainment. The income analyses correspond to those carried out for employment and use the same explanatory variables. The difference is that here we use log income as our outcome variable and we use a linear regression model.

In general terms, the results obtained are very similar to those of the logistic regression analyses. Women who are gainfully em-



ployed have (model 1) a significantly lower annual income than gainfully employed men, i.e. SEK 116 800 as compared to SEK 161 200. The confidence interval (95 per cent) for women is 115 400-118 200 and for men 159 500-163 000.

In four steps, we add the explanatory variables ethnic origin, grades obtained at the end of the 9th year of compulsory schooling, unemployment rate of the municipality and, finally, educational attainment (models 2-5). Only the final model (model 5) is presented here. Endnote <sup>(9)</sup> contains an analysis of variance summary table listing tests of various effects in the final model.

By and large, the significant effects are the same as in the logistic regression analyses. Here too, and for the same reasons, the presentation is broken down into two conditional models, one for men and one for women. The results are presented in a way that is analogous to our presentation of odds ratios: differences in least square means of log income for all categories compared to the same categories as in the logistic regression analyses. The differences have been exponentiated, which transforms them into ratios between geometric means of income in SEK, with the comparison category in the denominator. Thus, they express average income relative to the comparison category. The comparisons are applicable within each partial model, so that men are compared to men and women to women. For comparisons of average income between men and women see, model 1, which has been described above.

Educational attainment interacts significantly ( $p=0.0004$ ) with grades obtained in the 9th year of compulsory school, i.e. the relation between income and educational attainment varies by grade group. Therefore, income ratios are specified for all combinations of grades and educational attainment within each partial model, see table 5. In addition, there is also a moderately significant ( $p=0.022$ ) interaction between the municipal unemployment rate and educational attainment, which is why the same breakdown is carried out for the municipal unemployment rate, as well.

To a very high degree, table 5 displays the same tendencies as table 3. That is to say the relationships between incomes and the explanatory variables are strikingly similar to those which hold between employ-

ment and the same explanatory variables. Given the substantial similarities with table 3, we shall here mainly refer back to the comments made after table 3 and table 4. Neither do we find it necessary to compile a table corresponding to table 4.

However, one difference between tables 5 and 3 needs to be commented on. Due to a significant interaction between municipal unemployment and educational attainment, the impact of the municipal unemployment rate has been broken down by educational groups in table 5. With both men and women, the group of individuals with a three-year vocational education display the highest ratio - or exponentiated regression coefficient - (0.978 and 0.989 respectively), meaning that the regression line with municipal unemployment is relatively flat in their case and, hence, their vulnerability to municipal employment relatively low. The three remaining educational groups have lower ratios of approximately the same magnitude and thus higher vulnerability, both for men and for women. The fact that women are less vulnerable to the local labour market situation than men is a recurrent aspect, which we have already seen in the logistic regression analyses.

## Conclusion

Young people (born in 1974) with no upper secondary education had great difficulties in getting a job when they entered the labour market at age 16 in 1990, while the proportion of gainfully employed quickly increased among young men and women with a vocational upper secondary education two and three years later. Soon they were more gainfully employed than those lacking an upper secondary education. However, from 1995 the gap between those with and those without a vocational upper secondary education did not increase any longer. Thus, the advantage of having vocational training was particularly evident in the beginning of the 1990s during the economic recession in Sweden.

Young adults with a vocational upper secondary education are, however, better equipped to compete in the labour market even if one disregards their upper secondary education (Murray, 1997). In order to investigate more closely the actual significance of vocational training itself for young adults in the labour market, we have analysed their



employment in 1998, the last year of the investigated period, by means of logistic regression analysis and their income by means of linear regression analysis controlling for the background factors gender, ethnic origin, final grades from compulsory school and local unemployment in the individual's home municipality in 1998.

The results indicate that both with respect to employment and income, it is a clear advantage to have completed a vocational upper secondary education as compared to lacking an upper secondary education. A three-year vocational education, however, produces only a moderate advantage over a two-year education. For young adults with low grades and a three-year education, no statistically significant advantage has been established at all compared to those who have completed a two-year programme. In another study on the effect of a third year (Ekström, 2003), no advantage was found on employment.

The monitoring period is fairly short for investigating the effects of education and training. In a longer perspective, the effects of vocational upper secondary education and of having completed a third year could prove to be more substantial. Also, the three-year vocational upper secondary education programmes were new and unknown to em-

ployers, whereas the two-year courses had existed since the 1970s.

Finally, an important conclusion is that it is not exclusively the education completed, but also other background factors that have an impact on young adults' situation in the labour market. The effects of gender, ethnic origin and grades respectively are of approximately the same magnitude as having or not having completed vocational upper secondary education. The unemployment rate of the home municipality also influenced young people's employment and incomes, men's more so than women's. The fact that employment increased at the same pace for all investigation groups during the latter part of the 1990s also means that it was not only a lack of education that caused the low employment rates of young adults without upper secondary qualifications at the beginning of the 1990s. They were also a result of the low demand for labour.

### Acknowledgements

Helge Benmarker compiled the basic data material for this study, and Erika Ekström collected data and worked out certain results. The study was financed by the Swedish Council for Working Life and Social Research.

### Annex

**(<sup>e</sup>) Table 6. Test of effects in the final model of the logistic regression analyses (model 5):** Printout from SAS macro glimmix, slightly modified. (NDF and DDF are the numerator and denominator degrees of freedom in the source of variation and the error term, respectively.)

Source	NDF	DDF	Type III F	Pr > F
Ethnic origin	1	41314	271.15	0.0001
Gender	1	41314	99.89	0.0001
Ethnic origin * gender	1	41314	17.00	0.0001
Grade group	2	41314	144.71	0.0001
Gender * grade group	2	41314	12.31	0.0001
Municipal unemployment	1	282	60.12	0.0001
Municipal unemployment * gender	1	41314	22.26	0.0001
Education attainment	3	41314	434.79	0.0001
Grade group * education attainment	6	41314	4.30	0.0002

**(<sup>e</sup>) Table 7. Test of effects in the final model of the income regression analyses (model 5):** Printout from SAS proc glimmix, slightly modified. (NDF and DDF are the numerator and denominator degrees of freedom in the source of variation and the error term, respectively.)

Type 3 Tests of Fixed Effects				
Effect	Num DF	Den DF	F Value	Pr > F
Ethnic origin	1	204	121.35	<.0001
Gender	1	204	121.35	<.0001
Ethnic origin * gender	1	101	16.22	0.0001
Grade group	2	565	88.06	<.0001
Gender * grade group	2	530	4.68	0.0096
Municipal unemployment	1	282	75.41	<.0001
Municipal unemploy * gender	1	31E3	7.58	0.0059
Education attainment	3	832	156.77	<.0001
Grade group * education attainment	6	1278	4.15	0.0004
Municipal unemploy * educ attainment	3	31E3	3.21	0.0220



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## Key words

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## Mariana Gaio Alves

Professor in the  
Department of Applied  
Social Sciences  
Researcher at UIED -  
Unidade de  
Investigação, Educação  
e Desenvolvimento  
[Research, Education  
and Development Unit]  
Faculty of Sciences and  
Technology -  
Universidade Nova de  
Lisboa



# The entry into working life of higher education graduates: an educational perspective

**The research underlying this article seeks to improve our understanding of the processes of entry into working life of higher education graduates. In theoretical and conceptual terms, contributions from a variety of disciplines (particularly economics and sociology) and different theoretical currents and frameworks have been used to interlink perspectives which are usually developed in parallel yet separately.**

**In empirical terms a case study was conducted on the process of entry into working life of graduates of a higher education institution, the findings of which are summarised and compared with data from other national and international studies on the same theme. The article concludes by identifying areas for further research that would benefit from Europe-wide comparison, and from interlinking theoretical and disciplinary perspectives.**

## Introduction

This article describes a study carried out in 2003 entitled 'The entry into working life of higher education graduates: an educational perspective', part of a PhD thesis in Education Sciences undertaken in the Faculty of Sciences and Technology at Universidade Nova de Lisboa. The purpose of the research, focusing on relationships between education and work/employment, is to improve our understanding of how higher education graduates enter working life.

This attempt to explore a deeper understanding of entry into working life is relevant both in *disciplinary* terms - little research has been done on the subject - and in *social* terms. While a higher education graduate's future once appeared to be guaranteed, associated as it was to high social status and income, the significance and value of a higher education qualification is now clouded by uncertainty. Thus, the entry into working life, particularly access to employment, is gradually acquiring greater social prominence. It has also become a subject of interest to students and their families, employers, academics and even governments, who see it as a criterion for assessing higher education.

Our work seeks to broaden the research themes normally examined in the area of entry into working life, focusing not only on graduate access to employment, a topic traditionally addressed in this field of research (1), but also on entry into working life as a period of learning, personal development and identity building. In an attempt to go

beyond reductionist views which see entry into working life merely as the product of education's responses to the needs and demands of the economic and professional world, we perceive entry into working life as the result of interaction between academics (their values and strategies), employers (their approaches and needs) and graduates (their personal and social trajectories and dynamics) (2).

The first part of the article sets out some of the theoretical and conceptual issues arising in the research, informed by contributions from a variety of theoretical currents and frameworks and different disciplines (3), and attempts to interlink parallel perspectives that are usually developed separately.

The second part outlines the empirical research method used and sets out the main findings. A case study was conducted of graduates of the Faculty of Sciences and Technology (FST) at Universidade Nova de Lisboa, focusing on three units of analysis: the graduates themselves, employers and academics. Where possible, comparisons were drawn between the data from our research and the findings of other national and international studies on the same subject in order to identify similarities and dissimilarities between the process of entry into working life of FST graduates and the same processes experienced by graduates of other higher education institutions.

The article concludes by identifying areas for further research that would benefit from Europe-wide comparative studies.

(1) For some, the issue of access to employment is 'the fundamental question' in the area of research into entry into working life, the same authors stating that 'l'accès des jeunes à l'emploi, question fondatrice de ce domaine, reste la plus étudiée' (Kieffer and Tanguy, 2001, p. 98).



## A model for analysing entry into working life within educational research

### A field of research under construction

The field of research into entry into working life is currently a 'conceptual patchwork' (Trottier, Perron and Diambomba, 1995), and since the 1990s has been in a 'stage of construction' (Trottier, 2001) <sup>(4)</sup>. Several countries have recorded a growth in the number of initiatives for collecting information on graduate entry into working life, both by higher education institutions and central governments <sup>(5)</sup>. There seems to be a broad consensus, however, among various authors (Trottier, Laforce, Cloutier, 1998; Vincens, 1997; Nicole-Drancourt and Roulleau-Berger, 1995; Trottier, Perron and Diambomba, 1995; Tanguy, 1986) that this work has been done without far-reaching reflection or a rigorous definition of the concepts to be brought into play, including the concept of entry into working life.

There are two main reasons for this, the first being that research into entry into working life is still in its infancy. It was from the 1970s, when there was an increase in the difficulties young graduates encountered in finding employment and the need arose to plan and manage the education system in conjunction with increasingly rapid changes in the production system, that a field of research emerged, focusing on the problematic relationships between education and work/employment. This field 'conjugates in the plural', according to Jobert, Marry and Tanguy (1995), to encompass a variety of research topics, inter alia the planning of education, continuing education, qualification and entry into working life.

Secondly, the definition of the concepts and perspectives to be brought into play in this field of research is embryonic because it lies on the margins of several disciplines and theoretical approaches. Reflection on entry into working life involves contributions from a variety of disciplines (sociology, economics, human resources management, studies on youth, education, work, employment) and a variety of theories focusing on educational issues, the analysis of the labour market and coordination between education and work/employment. Entry into working life is therefore seen as a thematic research area within research into the

relationships between education and work/employment, and subject areas, methods and approaches to analysis must therefore be reconciled where possible.

### The most relevant approaches and theories in studying entry into working life

Our research therefore involved placing a range of the most relevant and significant approaches and theories in the area under study on a systematic footing, so as to clarify the perspective adopted in our research into entry into working life.

A range of *traditional* theories and approaches on the relationships between education and work/employment was considered. These do not attempt to address the concept of entry into working life directly or to highlight the problems it involves, but they are important references in examining the theory of human capital and some of its subsequent developments, the sociology of educational inequalities, labour market theories (from theories of segmentation and regulation to the employment system approach), to human resource requirements and the social demand for education.

A range of theoretical perspectives on the concept of entry into working life was also considered. According to some of these, this concept is determined by models of entry into adult life (Olivier Galland), by corporate and state policies and strategies (José Rose), by employers and their methods of managing labour, and by the relationship between individuals and employment (Michel Vernières). Others stress the aspect of constructing a personal and social identity leading to the achievement of the individual's ambitions (Jean Vincens and Claude Trottier et al), or see the concept under a dual structural and individual dimension (Nicole-Drancourt and Roulleau-Berger, Claude Dubar).

Various perspectives on the functions of higher education were also analysed according to a continuum between two opposite extremes: functionalist positions and academic positions. The contributions of various thinkers on education and higher education, particularly Ronald Barnett and Ulrich Teichler, were brought into play for this analysis.

<sup>(?)</sup> Very recently, during a final revision, we came across a similar approach by a French researcher (Bel, 2001) who, in order to study vocational training for young people, stresses the importance of making the field of research into training-employment more complex, distinguishing three strands: training system, production system and trainees-workers.

<sup>(5)</sup> Particularly economics and sociology, which are fundamental in this field of research, as stressed by Trottier, 2001; Kieffer and Tanguy, 2001.

<sup>(4)</sup> According to this author, 'au cours des années 1990, on a franchi une nouvelle étape dans la construction du champ de recherche et la définition de l'objet d'études. Différentes approches théoriques permettent maintenant de mieux conceptualiser le problème de la transition et d'en proposer diverses interprétations. On est passé du stade du constat du problème à celui de sa construction.' (Trottier, 2001, p. 9).

<sup>(6)</sup> Initiatives to collect information on entry into working life have been developed since the 1970s in several countries, including France, the United Kingdom, Canada and Spain. In many cases these initiatives involve higher education graduates, and they generally began before those carried out in Portugal.



The functionalist approaches, also called 'utilitarian' (Conceição et al., 1998) and 'instrumentalist' (Barnett, 1994), are based on the assumption that higher education has a particular function in relation to the society it is part of. The academic approaches, also referred to as 'culturalist' (Conceição et al., 1998) and 'liberal' (Barnett, 1994), reject the functionalist assumption on the grounds that higher education has its own intrinsic value. These positions correspond to two distinct models for understanding the link between higher education and work/employment. Both of them are open to question, but as opposite extremes they are useful in defining the potential for such linkages.

Although a detailed analysis of each of these perspectives and approaches is beyond the scope of this article, they must nevertheless be identified and systematically organised so as to clarify the assumptions underlying the model for analysing entry into working life established in our research.

### Theoretical research assumptions

An initial assumption is the idea that entry into working life must be seen as a process extending over time, throughout which the similarities and dissimilarities between education and work/employment evolve. The notion that entry into working life represents a circumscribed moment of linking education and work/employment is thus rejected.

This assumption derives from recognition that, at empirical level, the way the transition from education to working life takes place has changed, and it is now longer and more complex. As Trottier states (2000), this means that the training-employment relationship is now simultaneous rather than linear and consecutive, or, according to Chagas Lopes and Pinto (2001), that the traditional steps of learning-entry into working life-employment-retirement have changed and no longer follow this sequence.

In theoretical and conceptual terms, this illustrates the inadequacy of perspectives based on the alignment between education and employment (the initial versions of the theory of human capital and the manpower requirement approach, for example), and those focusing above all on the functioning of the labour market (labour market theories). The

analyses to be adopted must see the relationship between education and work/employment as an interactive one, involving similarities and dissimilarities between the two, and considering entry into working life as a phase that covers a more or less extensive period of time <sup>(6)</sup>.

A second theoretical research assumption is that entry into working life is a process that involves various actors and does not only relate to graduates' labour market trajectories on completion of their university studies.

This assumption recognises the relevance of a holistic analysis, encompassing various dimensions and factors that influence the entry into working life. Such factors were identified from the theoretical perspectives, approaches and proposals of various authors cited throughout the theoretical part of our work. Entry into working life is seen as a process, not only because it is protracted, but also because it is multidimensional.

Our understanding of the processes of entry into working life would benefit from broadening the scope of analysis to encompass more than a study of the trajectories, conduct and strategies of the actors and/or a study of the forces involved in the building of the individual's professional choices and identity. We therefore agree with Vincens (1995) when he puts forward the notion of 'system of entry into working life' with a view to expanding the framework for analysis and including other categories of actors, such as employers and the education system.

In other words, it is important to build an analysis of entry into working life as a process deriving from comparison of and interaction between the approaches and strategies adopted by various relevant actors. This research seeks to respond to this challenge by means of a preliminary attempt to define a multidimensional analysis of entry into working life.

A third theoretical research assumption closely linked to the above corresponds to identifying the actors considered to play a part in the process of entry into working life. Based on systematically organising theoretical perspectives, approaches and proposals, graduates, employers and academics are placed under the spotlight, each of these groups being taken as a unit of analysis in studying entry into working life.

<sup>(6)</sup> The question arises here of defining the period of entry into working life, an aspect still not fully clarified on conclusion of the research. We believe it is fair to say that the process of entry into working life begins with obtaining a qualification and the subsequent search for a job, even if the subject has already begun to build a professional identity during their academic career. The definition of the end of the period of entry into working life, however, continues to be more problematic. The existence of various possible criteria of both a subjective nature (e.g.: expectations prior to entry into the world of work) and an objective nature (e.g.: obtaining a job with an indefinite contract) must be accepted for this definition (Vincens, 1997).





Graduates are a unit of analysis because their trajectories reflect and synthesise the influence of various actors and factors throughout the period of entry into working life. They should also be seen as a unit of analysis because various theoretical approaches already cited (the employment system approaches of Trottier, Dubar, Nicole-Drancourt and Roulleau-Berger, for example) show that graduates' strategies and conduct are not governed by a strictly economic rationale, but are in fact marked by elements of a social and cultural nature and by the dynamics of socialisation and identity building.

Employers are a unit of analysis because as various labour market theories and Rose and Vernières' approaches show, graduate opportunities for entering working life are influenced by factors related to labour management and recruitment options. Moreover, the functionalist and academic models of higher education suggested that this subsystem of education must take due account of the limitations arising out of the functioning of the labour market and employers' preferences, even if such aspects should not be followed blindly.

Academics are a unit of analysis since some of the approaches cited (the employment system and human resource requirement approaches, for example), and the functionalist and academic models, suggest that the orientations and practice of the functioning of higher education, particularly as regards preparation for working life, play a pivotal role in how graduates enter working life. Education (in this case higher education), plays an important role, together with other actors, in how the entry into working life takes shape after graduation.

In summary, the analysis presented clearly shows that we consider entry into working life to be a multidimensional process, since it has implications both at conceptual and methodological level, as Tanguy has argued (1986). The role each actor plays in the process of entry into working life must therefore be examined and the process analysed as the result of the interaction between the various actors involved.

### Empirical research method

In line with the analysis set out above, our empirical research involved a range of data collection and processing procedures fo-

cus on the three units of analysis considered essential for analysing processes of entry into working life. Academics, employers and graduates were interviewed and graduates were asked to complete a questionnaire.

The questionnaire was posted <sup>(7)</sup> to FST graduates who completed their courses in the year 1995/96. In that academic year, 401 individuals completed degree courses at the FST and, after updating the addresses in the institution's files, we managed to contact 301 graduates, 103 of whom completed the questionnaire <sup>(8)</sup>. The questionnaire was an adaptation of the pilot survey carried out nationwide <sup>(9)</sup> to allow findings to be compared.

Four FST graduates who used to work in the six companies contacted were also interviewed, since we were told that no FST graduates were working in two of the companies when we contacted them.

Six employers in the companies <sup>(10)</sup> were interviewed, selected on the basis of an analysis of offers of training and/or employment sent to the FST <sup>(11)</sup> in the year 2000. This enabled the eight companies whose needs covered a greater number of academic degrees (at least four) to be identified. However, the interviews did not take place in two of these, in one because of unavailability and in another because it was located in France.

Four people who held various positions in the FST were interviewed. It was considered essential to interview the head of the GESP (Gabinete de Estágios e Saídas Profissionais) at the FST, since this office was responsible for a variety of activities focusing precisely on graduate entry into working life. It was also decided to interview the heads of the governing bodies of the FST (Chairman of the Scientific Committee, Chairman of the Teaching Committee and Director of the institution), since the intention was to identify the views of people in the academic community on university education and its purposes and thus clarifying the aims of university practice <sup>(12)</sup>.

The content of the interviews was analysed to ensure that a comparison was made but also to ensure that the features of each interview were identified. Statistical techniques were used to analyse data from the questionnaire.

<sup>(7)</sup> The decision to post the questionnaire to graduates is relatively common in work of this type carried out in other Portuguese universities (Aveiro and Lisbon Universities, for example), response rates being relatively high.

<sup>(8)</sup> The collection of data was therefore quite successful in terms of the rate of return of duly completed questionnaires (44.1 % of the working universe, composed of 301 individuals, and 33.1 % of the general universe, composed of 401 subjects, exceeds the expected norm - 30 % - in this type of data collection).

<sup>(9)</sup> Collection of information by the ODES (Sistema de Observação de Percursos de Inserção de Diplomados de Ensino Superior, coordinated by the INOFOR - Instituto de Inovação na Formação - Ministry of Labour), carried out in 1999.

<sup>(10)</sup> 'Employers': people in the six companies contacted who are responsible for recruitment and who had contacted the GESP (Gabinete de Estágios e Saídas Profissionais) at the FCT to provide information on jobs/training courses offered by the company.

<sup>(11)</sup> Offers of employment and/or training courses for graduates and recent graduates of the FCT are centralised in a unit which at the time of the empirical research was the above-mentioned GESP. This unit was subsequently incorporated into a larger structure - the CIDI (*Centro de Informação, Divulgação e Imagem*).

<sup>(12)</sup> It might be argued that this option is restrictive; but we felt it was appropriate, bearing in mind that it was impossible to interview the academic community as a whole, and that there was a lack of previous research in this field - which in our opinion meant that it was unsound to use a questionnaire to canvass this population on its views and practices. We also suspected - and this was confirmed when the interviews were carried out - that because of the positions the interviewees held, they were privileged informants for identifying the principal positions, strategies and opinions prevailing among the academic community.



### **The process of graduate entry into working life: the case of the Faculty of Sciences and Technology**

As stated above, the empirical research work involved a case study of the entry into working life of graduates of the FST, an institution that delivers a variety of courses in engineering (Environmental Engineering, Industrial Production, Information Technology, Geology, Mechanics, Chemistry, Physics and Materials) as well as degrees in Mathematics and Applied Chemistry. As usual with a case study, the intention was not to show that the data are generalisable<sup>(13)</sup>, but rather to provide indications on how entry into working life of university and/or higher education graduates in general takes place.

### **The relationship between education and employment in the case of FST graduates**

The FST graduates in the study tended to obtain their first job after graduating relatively quickly compared with what seems to be the case from the findings of other national (Odes, 2002) and international research (Brennan et al, 2001).

It is also well-known that the transition from education to working life tends to be marked by high job mobility in the three years following graduation. This is probably not specific to higher education graduates, since research into mobility throughout the life cycle (Chagas Lopes, 1989) has shown that people change jobs more frequently in the early years of their working lives.

In the case of FST graduates, access to employment, particularly the first job, tends to depend heavily on networks of personal connections. In this respect our research findings differ from those of other national (Alves, 2001) and international studies (Brennan et al, 2001), since this method of obtaining a job is not as significant in the latter's figures.

In terms of methods of obtaining and offering employment, the Internet is beginning to come to the fore as a link between job seekers and job providers. Larger companies are beginning to set up databases of job seekers from unsolicited applications (graduates sending CVs), and from direct contact with higher education institution students, including final year students. Both

companies and graduates recognise that these institutions must have offices to promote contact between employers and students/graduates, an example of which is as the GESP at the FST.

The transition to working life is also marked by the fact that, once they have finished their degree, graduates who were full-time students during their final year and who obtained higher final average marks tend to have to wait longer before they get a job. It is also important to assess the FST graduates' transition between education and employment on the basis of a set of indicators of the *quality* of the employment.

Thus, it appears that very few graduates experience periods of unemployment, and when they do, these tend to be infrequent and short-lived (rarely exceeding 12 months). They seem to occur more because of bottlenecks and difficulties in access to employment rather than because the graduates' own strategies keep them out of work.

The insecurity of the career trajectory of the graduates in the years immediately following graduation is well known and affects almost half the subjects, though it does tend to diminish over time. This is partly a result of the recruitment strategies of employers, especially large companies, who seem to opt to recruit recent graduates on a fixed-term basis to cover occasional gaps in their organisations.

As would be expected, average pay levels also tend to rise over time after graduation, not only as a result of inflation-linked pay rises, but also in line with career progress. This trend is probably not specific to FST graduates, as it has been observed in other national studies in relation to Portuguese higher education as a whole (Odes, 2002 and 2000).

Finally, it should be noted that the graduates in this study more often join larger companies and public administration and that this trend increases with time after graduation. This seems to be characteristic of Portugal, a theory supported by similar findings from a study on Portuguese higher education graduates in general (Odes, 2002), though research at European level (Brennan et al, 2001) suggests that the private sector is by far the largest employer of such graduates.

<sup>(13)</sup> One of the distinctive features of case studies is to allow greater understanding rather than a statistical generalisation of findings (Yin, 1989).



Not surprisingly, therefore, most of the FST graduates view a higher education qualification as a means of gaining access to employment. It is worth noting that none of the three groups interviewed (graduates, employers and academics) accept the idea that graduate unemployment is rising.

The interviewees also pointed out that unemployment has an unequal effect on graduates of the different subjects, engineering graduates enjoying more favourable conditions of access to employment. The *scepticism* about the huge proportions of graduate unemployment and the fact that it overlaps all subject areas is also confirmed by the findings of both national (Odes, 2002 and 2000) and international studies (OECD, 1993).

### **The relationship between education and work in the case of FST graduates**

Among the FST graduates concerned there seems to be some correspondence between the area of study and the field of professional activity; most of the interviewees feel that the two coincide. This widely-held notion that the area of study and professional activity coincide has also been recorded in two other studies carried out in Portugal (Odes, 2002; Alves, 2001).

This does not mean, however, that the qualification in and of itself bestows the ability to perform a professional activity with competence immediately after graduating. The analysis of the answers of interviewees (graduates, employers and academics) suggested that initial academic training is seen as a preliminary stage in building professional ability.

A clear dichotomy has in fact been identified between the university setting and the work setting, *theory* being associated to the former and *practice* to the latter, a pattern that tends to be seen as *natural* and *inevitable* against the current background of rapid and constant economic and professional change. Gaps in initial academic training are also mentioned (particularly as regards languages and user-centred information technology), as is a lack of coordination between the skills and knowledge developed in the university setting and the work setting. Graduates are also notoriously ignorant of the rules, behaviour, communication and relationships, culture and values prevailing in workplace organisations.

For all these reasons, undertaking formal training after graduation and experience-based, career-long learning help to make graduates more competent and capable of doing their job after graduating.

It should be noted that training after graduation is more common among people who work in larger companies when they already have a few years' professional experience. To academic training, graduates more often prefer specialised training that will enhance their professional skills, especially information technology. The demand for this type of training seems to be more common among groups who wait longer to obtain a job (such as women and graduates with higher marks).

Regarding learning by experience, interviewees (employers and graduates) had some difficulty specifying *what is learnt* - though after pausing and hesitating their answers identified three different levels: technical and theoretical knowledge, non-technical skills, and knowledge of workplace organisations and their production processes.

In our opinion, recognition that professional ability builds up gradually is related to the fact that academic interviewees all advocate a more general model of initial academic training, leaving specialisation for the post-degree stage.

A more detailed analysis of the academic interviewees' responses nevertheless highlights a lack of consensus regarding the form such initial general training should take. Some argue for more importance to be given to theoretical and subject knowledge, while others emphasise the importance of moving teaching, and generally the ways in which universities work, toward the development of skills and attitudes relevant to graduates' future lives. The latter is a more comprehensive view, less restricted to the cognitive field and more focused on the development of the whole person.

The idea that changes must be made in teaching (curricula, teaching strategies, etc.) and in how universities operate (compliance with rules and time periods for teaching, for example), so as to improve students' preparation for (working) life, seem to be widespread among the academics interviewed. Such a need for change is latent and has not yet been fully implemented in the FST for various reasons, due both to the institution's



internal functional organisation (departmental 'corporatism'), or to external conditions (e.g. central government funding).

Another issue on which there is little consensus among the academics is how important the preparation for working life should be within the wider context of university activities. Some argue that they should play a central role in decisions determining academic activities, while others strongly disagree, asserting that universities should not be influenced by such concerns.

The view that the criteria used by employers in graduate recruitment processes tend to reflect a devaluation of final degree marks is also in our opinion associated to recognition that *building professional ability is a gradual process*.

Employers do not in fact appear to view graduation with a particular average final mark as a relevant criterion. For some employers, on the other hand, the institution awarding the degree is a factor, evaluated on the basis of prior knowledge (and assessment of the ability) of other graduates of the same institution. What employers do appear to see as essential, however, is the assessment of non-technical skills, which are fundamental to integration into workplace organisations and to inter-personal relationships.

The selection and recruitment process is structured in a similar way in the various companies examined and includes an analysis of curricula and interviews with applicants. The number and type of analyses and interviews is more complex in larger companies with special recruitment and selection departments, and may include group tests and interviews in technical and human resources areas.

Finally, and also helping to detail the relationship between education and work in the case of FST graduates, our research suggests that the increase in the number of graduates has led to a change in the type of professional activities, tasks and functions they perform. Graduates are required to carry out existing tasks and functions, but also tasks and functions in completely new areas in the employing organisations (connected to the environment and quality in particular), and tasks and functions that were not previously carried out by higher education graduates.

In this context, a study in the UK (Harvey, Moon and Geall, 1997) suggests that graduates need to be aware of job opportunities in professional sectors and activities that until recently were not staffed by graduates.

### **Experience of the transition from university to working life**

The vast majority of the FST graduates in the study had little or no contact with the world of work before or during their courses<sup>(14)</sup>, particularly the women and those whose final marks were higher. In most cases their first job therefore tends to be the first time they come into contact with the world of work and workplace organisations.

It is these circumstances that seem to generate the greatest difficulties in the transition to working life, which graduates see as a stage of change, particularly personal change, and where real life after graduating sometimes does not live up to expectations.

These difficulties are particularly stressed by graduates who completed their studies less recently, which suggests that recent graduates (with only one or two years' experience since graduating) may in most cases not be the most suitable subjects for a fuller appraisal of this transition and the changes involved. Recent graduates may not yet have sufficient detachment to allow them to reflect more deeply on the transition, which they tend to describe as a stage free from difficulty.

Whatever the case, overall there is a high degree of satisfaction among the graduates concerned on their transition to working life; they particularly recognise the value of personal and professional achievement and the usefulness and interest of the activities performed.

The graduates' view is that entry into working life encompasses not only access to employment and its characteristics and restrictions, but also the dynamics of personal and professional achievement and satisfaction and of recognition, by employing organisations, of their professional ability. Employers attach importance to how graduates meet the needs of the job and workplace organisations, while academics stress personal and professional fulfilment and professional ability.

<sup>(14)</sup> This is consistent with the general trend in Portugal and Europe, where very few people attend higher education and work at the same time, in contrast with North America, where it is much more common to do so.



This means that people's opinions on entry into working life are to some extent influenced by the positions they hold. But these opinions also show that the interviewees see entry into working life as a multidimensional concept, one that is difficult to assess on the basis of objective criteria (e.g. obtaining a particular job).

It should also be noted that this transition is experienced in different ways according to the groups the graduates fall into; thus, no universal value can be attributed to a higher education qualification in the transition to economic and working life.

For example, only graduates of certain degree courses (applied chemistry, the statistics branch of mathematics, materials engineering) do not yet enjoy a more stable contractual situation, i.e. most of them do not yet have an indefinite contract. It is also the case that some graduates (computer engineering, actuarial mathematics and industrial production engineering) have to wait the least amount of time until they get a job, in contrast to graduates of the operational research branch of mathematics, who tend to wait longest until they obtain work.

A further example is that graduates who obtained higher marks tend to wait longer until they get a job; most do not enjoy more stable contractual conditions than graduates who finished with lower average marks. These are recorded trends but they are classified as slight, and it is therefore not possible to establish an unequivocal link between average degree marks and career trajectories.

The most striking example that a higher education qualification does not have universal value, however, lies in the differences observed between male and female graduates. As other research has shown (Odes, 2002; Brennan et al, 2001; Alves, 2001 among others), the differences between male and female graduate career trajectories are very evident.

It is well known that indefinite contracts and self-employment are less common among the women FST graduates in the study, while part-time work with lower average levels of pay is more common. The conditions of employment of female graduates tend to deteriorate with the passage of time compared to those of their male counterparts. These

trends are perceived by female graduates and are reflected in lower overall levels of career satisfaction than those recorded among male graduates.

It should finally be noted as regards experiences of the transition from university to working life that it appears to be accompanied by the formation of independent conjugal households among graduates. The spouses of graduates generally have higher average levels of education than their parents and families of origin, and are themselves also higher education graduates in many cases. In addition, while many of the graduates in the study originated from the Lisbon Metropolitan Area before attending the FST, the region is boosted after graduation because students from other regions tend to settle there.

## Conclusion

In the final part of this article the findings of our study are used to identify areas for further research that would benefit from comparative analysis at European level with a view to developing our understanding of processes of entry into working life experienced by higher education graduates.

A consensus has in fact developed on the usefulness of comparing the situation in several European countries in terms of research into entry into working life with the aim of establishing a better definition of the difficult issues to be examined and the concepts to be brought into play. It is important for other South and Eastern European countries to participate in order to ensure that the conceptualisations and theoretical models do not overlook the specific features of these European regions, a factor that would raise some very relevant research issues (as stressed by Raffé, 2001; Kieffer and Tanguy, 2001) <sup>(15)</sup>.

## Alarmism on the difficulties of entry into working life?

Both data from our research and the findings of other studies suggest that an alarmist attitude prevails that tends to over-emphasise the difficulties felt by higher education graduates in the transition to working life. The period in which contact is first made with work environments and situations after graduation involves specific features and also raises particular difficulties that must be

<sup>(15)</sup> These authors state that 'les pays plus puissants sur le plan économique se trouvent également être les plus influents dans le domaine scientifique' (Kieffer and Tanguy, 2001, p. 105), and that 'les conceptualisations actuelles tendaient à ne pas prendre en compte l'Europe du Sud et de l'Est' (Raffé, 2001, p. 122).



clarified. Contractual ties, for example, are insecure, while at the same time jobs are obtained very quickly and the number of mostly short-lived situations of unemployment is low. But some Portuguese studies, analysing the development of the entry into working life of higher education graduates from a given institution immediately after graduating, suggest a deterioration in the conditions involved (Martins, Arroteia and Gonçalves, 2002).

It is therefore worth analysing whether these characteristic features of the process of entry into working life of higher education graduates are recorded in the various European regions. A recent study has identified Portugal as an exception in southern Europe, since the difficulties in the transition to employment seem to be less marked there (Kogan and Schubert, 2003) than in other southern regions.

An article on France also stressed that 'it would be an exaggeration to forecast a serious deterioration in the situation of young graduates in the labour market' (Verdier, 1997, p. 25). Even so, the figures for the higher education graduate unemployment rate cited in the article are well above what the Portuguese data suggest. This is because relatively low rates of unemployment are generally recorded in Portugal - but these coexist with large proportions of the population experiencing insecure employment and contractual instability, a hypothesis that should be examined by European comparison.

### **Diversification of graduates' professional tasks and functions?**

Our case study indicated that graduates perform jobs that already existed, carry out new tasks and functions arising in companies (connected to the environment and quality, for example), and perform work that did not previously require a higher education qualification. In other words, some higher education graduates are subject to 'absorption' through existing professional activities and through the expansion of the professional tasks and functions attributed to this labour market group, while others tend to be subject to 'integration' into the labour market by carrying out professional activities that did not previously require a higher education qualification<sup>(16)</sup>.

This hypothesis is also supported by the findings of other research, such as Harvey, Moon and Geall (1997) in the UK, in which higher education graduates are advised to be aware of 'new' employment opportunities. Along the same lines various authors (Robertson, 1997; Brown and Scase, 1997; Brennan et al, 1996) have stressed that a change is currently taking place in higher education graduates' traditional careers and jobs. That is to say, they challenge the extent to which the often cited difficulties higher education graduates experience in entering working life are not ultimately simply a consequence either of the growth in their number or in the number of technical and scientific professionals, which is reflected in a change in conditions of employment and the tasks and functions traditionally carried out by graduates of this level of education.

Should these trends be confirmed, research should examine the extent to which 'the terms 'over-education' and 'under-education' may be deceptive' (Hartog, 1999). In our view, the expansion of higher education has coexisted with the emergence of a 'different context' of higher education graduate work/employment, which means that there is a change in the respective labour market and a change in what is traditionally identified as graduate work.

We believe that this situation should not be classified, hurriedly and simplistically, as evidence of over-education or underemployment. Such a view presupposes the existence of a rigid relationship between academic qualifications and jobs. We would argue that the links between education and work/employment should be seen as an interaction in which there are similarities and dissimilarities between the two areas and in which changes in one sphere will impact upon the other. The relevance of this analysis could be better assessed from the findings of comparisons between different European countries as regards patterns of relationships between higher education qualifications and work/employment.

### **What explains the demand for higher education?**

Irrespective of what we know about the exact situation of higher education graduates vis-à-vis employment, it is clear that the growing visibility of the issue of their entry into working life, and especially the widespread

<sup>(16)</sup> The expressions 'absorption' and 'integration' are attributed to Teichler and Kehm (1995).



concern regarding unemployment and contractual insecurity, is linked to the fact that graduates increasingly cite employment and occupational outcomes as reasons for going into higher education. Data from our empirical work suggests that these aspects have become increasingly important among the reasons indicated by subjects for going into higher education and for choosing a particular course and a particular educational establishment.

In a situation where, at least in Portugal, the number of people applying for higher education is falling <sup>(17)</sup>, it would be useful to examine the relevance of this hypothesis by analysing the development of higher education in different European countries. This raises various questions that could be examined in the future:

□ What is the impact of ideas stressing the increasing difficulties that higher education graduates have in obtaining employment on the subjects' academic choices, and particularly on the demand for higher education?

□ What is the impact on society of the increasingly prevalent idea that a higher education qualification does not automatically guarantee access to privileged professional and social positions? Will this help to diminish the symbolic value of the qualification?

□ In higher education, what is the likely impact of this increasing visibility of the theme of graduate entry into working life? Will this help to bring about changes in the direction of higher education institutions and professionals?

### **Public administration as the principal graduate employer?**

The findings of our research and comparisons with other national and European studies have suggested that the trend for the public administration to become more important as an employer of higher education graduates may be a specifically Portuguese trait. Confirmation of this theory and an examination of the reasons underlying it is an area that would benefit from comparative study at European level, particularly in order to gain an understanding of the extent to which it reflects a specific feature of the national labour market.

### **What is the role of networks of personal acquaintances in access to employment?**

The importance of networks of personal acquaintances in gaining access to and obtaining employment should also be analysed. According to some researchers (Kieffer and Tanguy, 2001), family and social networks are very active in southern Europe as an element of access to employment, which suggests that this could be a specific feature of this region. The limitations, dimensions and explanatory factors of this feature should be addressed from a comparative perspective.

### **What differences are there between male and female graduate career trajectories?**

Both the findings of our own research and the conclusions of other studies in the same area very clearly show that access to the labour market and career trajectories in the years following graduation differ significantly according to the graduate's gender.

Our data suggest that male graduates appear to enjoy more favourable conditions of entry into working life which tend to become even more advantageous with the passage of time after graduating. This is reflected in a higher level of satisfaction of male graduates compared to female graduates in relation to career trajectory and situation.

Our research data also suggests that the reasons for these differences should be sought both in the recruitment and labour management strategies of companies, and in the choices and strategies of graduates themselves as regards work-family balance. It should be remembered, as our research has shown, that the period of entry into working life is accompanied by the formation of independent conjugal households by many graduates.

A recent European comparison (Smyth, 2003) shows that female graduate unemployment rates tend to be higher than male rates, particularly in Central European and Mediterranean countries, in contrast to Scandinavia and Eastern Europe. It would therefore be of interest to examine these gender differences during the period of entry into working life <sup>(18)</sup> from a European perspective, that would clarify the forms and reasons for European diversity in this area.

<sup>(17)</sup> Portugal has experienced a fall in the number of young people entering higher education in the last two academic years, even though, according to the 2001 Census, only 8.6 % of the population of 21 years of age or above had completed higher education. This figure is below that recorded in many European countries.

<sup>(18)</sup> The same piece of work states that 'much research on gender differentiation and segregation within the labour market has focused on adult workers. This paper indicates the need to investigate how gender differentiation emerges early in the labour market career, and the impact of early employment experiences on subsequent career trajectories' (Smyth, 2003, p. 84).



### What is the link between average degree marks and entry into working life?

The findings of our research have not enabled a clear (and statistically significant) relationship to be established between average degree marks and entry into working life. Employers, however, say that they do not attach importance to final marks as a recruitment criterion. Students who graduate with higher average marks experience longer and more complex periods of transition to working life, since they previously had less (or no) contact with the labour market.

According to what graduates, employers and academics say, this situation seems to reflect a dichotomy in higher education (associated to theory) and working life (characterised by practice). We should assess whether these assertions are generally true of Europe, and try to understand to what extent some education systems foster greater proximity to the economic and professional world; how they make it possible to go beyond this dichotomy; and, within these systems, what the link is between average degree marks and entry into working life.

### Entry into working life: a stage of lifelong learning?

Our research suggests that entry into working life is a learning period in which the subjects, mostly for the first time, come into contact with professional situations in which they need to learn technical and theoretical knowledge and to develop capacities for interrelating in work environments. As the findings also highlight, however, such learning extends throughout the subjects' career trajectories, since all the groups of interviewees stress that professional ability builds up gradually.

An extremely broad field of research emerges in this area, focusing on processes of lifelong learning and coordination between personal, career and academic trajectories. Analyses of the supply of training available to higher education graduates, for example, and the study of people's academic trajectories are areas in which comparisons between the situation in various European countries could be useful in investigating the variety of training patterns, strategies and practices.

This range of aspects should be developed in the field of educational research on entry into working life and would benefit from comparison at European level, as well as from a study that would bring different theoretical and disciplinary perspectives into play.

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### Key words

Academic degree, entry into working life, graduate employment, learning, social identity, university studies.





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**Marjolein  
C. J. Caniëls**

Assistant Professor at  
the Open University of  
The Netherlands.



# Teaching competencies efficiently through the Internet - a practical example

**Universities increasingly adopt innovative teaching models, which focus on the development of skills instead of the reproduction of knowledge. These new teaching models emphasise the importance of knowledge application and the development of competencies. Yet, using these teaching methods usually implies a high assessment burden for lecturers. Educational institutions are on the look-out for ways of offering competency-oriented teaching materials to students and keeping the assessment burden for lecturers down at the same time. This article gives a practical illustration of a marketing course developed by the Faculty of Management Sciences of the Open University of The Netherlands. This course shows a successful way in which both aims can be achieved simultaneously.**

(<sup>1</sup>) For an historical overview of distance education see Passerini and Granger, 2000 and Spooner et al., 1998.

(<sup>2</sup>) NIMA is the Nederlands Instituut voor Marketing (Institute for Marketing of the Netherlands). The NIMA-A examination assesses whether students possess the knowledge and the skills to operate on an executive level within the marketing discipline. The NIMA-A examination is oriented towards general marketing concepts and principles, marketing instruments and marketing environments and assesses whether students are able to actively apply their knowledge and skills in practice.

## Introduction

Can students learn competencies through an Internet course? Do guidance and assessment of a competency-oriented course not necessitate far too much supervisory time on the part of teachers? These are questions with which educational institutions in distance teaching wrestle.

Educational institutions are continuously under pressure to operate cost-effectively (Moonen, 1994). It is therefore important to keep down the time teachers spend on marking examinations. But is this still possible now that education is shifting from being knowledge-oriented to competency-oriented? Examinations using multiple-choice questions have the advantage that they can be easily checked automatically. As a result, they are cost-effective. However, multiple-choice examinations are specifically designed for assessing knowledge-oriented courses (Van der Vleuten, 1996). It is no longer possible to make do with multiple-choice questions in examining competencies (Daniëls and van der Vleuten, 2002). Open questions and project assignments are often the most appropriate way of examining competencies. Yet, using these methods usually implies a high assessment burden for teachers, since they have to assess every single assignment manually.

As a result, educational institutions are on the lookout for ways of offering competency-oriented teaching materials to students and keeping the assessment burden for teachers down at the same time. An unrealisable task as it seems. In this article we will give an example of how it is possible to accomplish both aims simultaneously. We will use a marketing course as an illustration. This course has been developed by the Faculty of Management Sciences of the Open University of the Netherlands. First, we will

discuss the background of the students and we will briefly review the programme that features the marketing course. After this, we will describe the competency-oriented nature of the course and we will explain how the exact set up of the course permits little guidance and assessment time. Finally, we will overview results from a survey held among students that finished the course.

## Background of the students and the course

The Open University of the Netherlands is an educational institute that is specialised in distance education. A typical student of the Faculty of Management Sciences is in his/her thirties, has a job in management and wants to deepen his/her knowledge in areas such as marketing, accounting and organisational behaviour and culture. The Management Sciences programme consists of courses in all these fields and more, including economics, human resource management and public administration. All courses are offered by distance education. (<sup>1</sup>) This entails that study materials are designed for self-study and students receive study materials at home (by regular and/or electronic mail and/or through the Internet). The communication between teachers and students takes place through e-mail, postings in discussion groups and telephone calls. Exams are generally taken in a classroom. Bachelor degree courses often use multiple-choice examinations, whereas master degree courses often involve writing assignments and project reports.

The *Introduction into Marketing* is a course at NIMA-A-level (<sup>2</sup>) offered in the bachelor phase to students of the Open University of the Netherlands. This innovative course started in September 2002. The course covers several fields, (see Table 1 for an overview of the course topics). Students are considered to spend 200 hours of study time on



this course. The written and electronic course materials can be studied independently, at the student's own pace and without the assistance of a teacher. If there is nevertheless an occasional need for substantive guidance, the student can contact a supervisory teacher (by telephone or e-mail).

### Competency-oriented learning

Universities increasingly adopt innovative teaching models, which focus on the development of skills instead of the reproduction of knowledge. These new teaching models emphasise the importance of knowledge application and the development of competencies (Enkenberg, 2001; Parikh and Verna, 2002). In traditional education, students study the textbook and apply their newly acquired knowledge to assignments. In a competency-oriented course students begin with assignments which invite them to solve practical problems. The Introduction into Marketing is a good example of a course that adopts competency-oriented teaching. The principle underlying the course is to develop in students the skill to apply theory to practical cases. In addition, students develop the ability to actively search for relevant information both from theory (textbook) and from practice (using case studies). After completing this course, students are able to work in a result-oriented manner and they can sensibly adapt and apply methods and techniques from marketing to practical situations.

The general design of the course is as follows. The student is guided by an electronic study manual that contains assignments and short case studies on sixteen different marketing topics (see Table 1). The assignments and cases are offered through the Internet. These are interactive and make use of multimedia. A separate textbook is sent to the students' homes. The book can be used to find relevant theoretical information while solving the assignments. It provides in-depth theoretical knowledge on each of the sixteen topics of the course.

For each of the sixteen marketing topics the electronic study manual offers three components through the Internet. These are:

- a self-test
- exercise assignments in an exercise case study.

<b>Overview of the course topics</b>	<b>Table 1</b>
<b>Part 1 - Orientation and introduction/overview</b>	
1. Overview of marketing	
2. Strategy development	
3. The marketing environment	
<b>Part 2 - Analysis of the market</b>	
4. Consumer behaviour	
5. Marketing research and marketing information	
6. Markets and segmentation	
<b>Part 3 - Product marketing</b>	
7. Product positioning	
8. New product development	
<b>Part 4 - Advertising &amp; promotion</b>	
9. Marketing communication strategies	
10. Advertising and branding	
11. Sales management, direct marketing and promotion	
<b>Part 5 - Pricing</b>	
12. Price policy	
13. Factors affecting price decisions	
<b>Part 6 - Distribution</b>	
14. Distribution policy	
15. Marketing channels	
<b>Part 7 - Marketing planning</b>	
16. Organisation, planning en control)	

- examination assignments in an examination case study.

### Self-test

Students can test the level of their own knowledge with ten multiple-choice questions. After each question, students automatically receive feedback on the answer they have filled in. It is clearly indicated in the feedback what is right or wrong in the answer chosen. Empirical evidence indicates that simply showing students the correct answer has less effect on learning than providing an elaborate feedback on the correct and incorrect elements of the given answer (Dempsey, Driscoll and Swindell, 1993). Moreover, the motivation of students is positively influenced when feedback is given that is tailor made to the answer of the student (Ross and Morrison, 1993).



Application-oriented assignments

Figure 1

The screenshot displays a learning management system interface for a marketing assignment. The main content area shows a document titled "Marketingmix" with the following text:

Uitpickende combinatie van vier met elkaar zamenhangende marketinginstrumenten (product, promotie, prijs en plaats) om de markt te bereiken, afgestemd op een of meer doelgroepen. Bestudeer paragraaf 1.1 van Verhage, B. (2001), Grondslagen van de marketing. Groningen: Wolters Noordhoff voor meer informatie over dit instrument.

Below the text, there is a "Mijn antwoord" section with a text input field and a "Toon antwoord" button. A search bar is also visible with the text "Omschrijf de publicatiemarkt voor CenterParcs. Geef drie voorbeelden van drie adverteerders die gebruik te maken van de informatie uit de tekst."

The interface also features a navigation menu on the left with options like "Start", "Mijn leerpaden", "Toelichting", "Toon antwoord", "Toon vragenlijst", and "Mijn antwoorden". A list of assignments is shown, including "01. Wat is Marketing", "02. Strategieën", "03. De marketingmix", "04. Communicatiestrategieën", "05. Marketingmix en -plan", "06. Productstrategie", "07. Productstrategie", "08. Productontwikkeling", "09. Marketingcommunicatie", "10. Strategie en assortiment", "11. Sfeer management", "12. Franchise", "13. Franchise", "14. Distributie", and "15. Distributie".

At the bottom, the user's name "Sophia Simons" and the institution "Open Universiteit Nederland" are displayed. The assignment is titled "01. Wat is Marketing" and is part of a course "Marketingmix".



In addition, the feedback shows which parts of the textbook provide further in-depth study material on the topic of the multiple-choice question. On the basis of the errors made in ten questions, students obtain an overview of the knowledge they lack. This gap in knowledge must be filled (by studying the textbook) before a start can be made on practising competencies for this specific marketing topic.

### **Exercise assignments**

In a competency-based approach, assignments provide the guidance for the learning process of students. In this course, students have to complete a number of exercise assignments on each topic in the electronic study manual on the Internet. These exercise assignments relate to an exercise case study. An exercise assignment is application-oriented, for example 'Describe the marketing mix for Center Parcs' or 'Assess the communication strategy of Peugeot'. The idea of using application-oriented assignments forms the core of the teaching methods in this course. The assignments (and not the case study) are the point of departure for the student. To complete an assignment, the student first needs theoretical knowledge (what does the concept of 'marketing mix' entail - or - how does one assess the communication strategy of a company?). Second, the student needs practical knowledge of the case with which the assignment is concerned (how does Center Parcs fit together? or what is there to know of Peugeot). A hyperlink from a theoretical term in the assignment to a glossary (see Figure 1) guides the students to the theoretical knowledge they need. As well as a brief explanation of the term, the glossary also contains a reference to a section in the textbook where this specific term is explained in more detail. Another hyperlink from the assignment refers to the case-study materials (see Figure 1). The case-study materials provide information resources on a specific company or practical situation.

Although the student has access to all the case-study information, he/she still has to decide for him-/herself what information is needed in order to answer the assignments. In this way, the student learns how to distinguish relevant from irrelevant information. The case-study materials include various links to relevant sites of companies and institutions. In addition, the text is

enriched with pictures, advertising film clips and on-line newspaper articles. This makes the case study alive for the student. The student feels that he/she is in a motivating learning environment, which invites him/her to think up solutions to the assignments. Appraisals among students show that this is also found to be the case (see the survey results further on in this article).

The approach as described above means that the students' work is very result-oriented. All the student's work is directly geared towards answering the assignment. A student does not study the textbook until the moment when he/she needs the specific theoretical knowledge necessary to complete the assignment. The theoretical knowledge drawn from the textbook can be immediately applied to the practical assignment. Therefore, the course contains key aspects of just-in-time learning (Schoening, 1998).

After the necessary knowledge has been acquired from theory and from the case, the student can type in the answer on-line in an answer window (see Figure 1). As soon as an answer is filled in and saved, a supervisory teacher can view the answer given. The answer has to be typed in and not just vaguely thought up, which prompts the student to express him-/herself well. The possibility of a supervisory teacher being able to see the student's answer has also the effect that the student will take care in filling in the answer. Students will do their best to justify the answers properly.

After the answer has been filled in and saved, the student can ask for feedback. The student is then shown a standard answer to the assignment. This answer often focuses on common errors. In addition, references to relevant passages from the textbook are included for interpretation of the marketing terms used. The student now learns from the differences between his/her own reply and the standard reply and can fill any remaining gaps in his/her knowledge by consulting the textbook.

### **Examination assignments**

Finally a number of examination assignments in an examination case study are presented to the student for each of the sixteen marketing topics. This is again done completely digitally. These assignments are of the same level as the exercise assignments



in the exercise case study. A similar procedure is followed to that described above for the exercise assignments and the exercise case study. The difference compared with the exercise assignments is that no feedback is given for examination assignments. This is justified by the underlying notion that learning takes place during the completion of the exercise assignments, and the examination assignments are purely geared towards testing.

### **Examination and assessment**

The design of the examination procedure is based on four requirements:

- A low assessment burden must be attained, while competencies are nevertheless tested.
- Students must be able to be examined (and therefore assessed) at any chosen moment.
- The assessment must be objective, and therefore independent of the teacher who carries out the assessment.
- Cribbing of answers must be visible straightaway, so that action can be taken.

The solution that has been designed deals with each of the above issues.

### **Testing competencies with a low assessment burden**

It is a general rule that what students have been taught must be examined (Brown, 1996). It is even the case that the method of testing determines what is learned (Prodromou, 1995; Gipps and James, 1996). In the *Introduction into Marketing*, students are taught to apply theoretical knowledge to practical case studies through the exercise assignments and exercise case studies. It is not possible to test whether students have acquired this skill during the course by using multiple-choice questions. Consequently, we use examination assignments in examination case studies for the assessment of students. In this way, we examine exactly the competency that has been taught.

How does this principle tally with keeping down the assessment burden for teachers? Does this way of working not lead to teachers spending a large amount of time on mark-

ing student answers? An average examination case study consists of six assignments. The course includes sixteen marketing topics, each of which contains one examination case study. This means that each student completes over 100 examination assignments. We have nevertheless succeeded in keeping down the assessment burden for teachers. The following approach has been adopted.

Of the sixteen examination case studies that the student completes, four are actually corrected. The student is allowed to choose two out of these four case studies to be assessed, while the other two case studies are drawn at random from the other fourteen examination case studies the student has made. The advantage of this method of examination is that the student will take care with all examination assignments, as he/she does not know beforehand which two case studies will be chosen at random by the electronic system to be added to the set of case studies actually assessed. As students choose two case studies themselves, they have some influence over the set of case studies looked at. This prevents the argument afterwards (in the case of a failure) that it is the worst case studies that have been included in the assessment. Broadly speaking, this method of examination does not have any drawbacks for students, while the approach offers great benefits to the teachers. Only four case studies have to be assessed, not sixteen. Teacher assessment time is therefore considerably reduced.

Other features of the electronic system that make assessment easier for teachers are discussed in the remainder of this article.

### **Continuous examination and continuous assessment**

It has been ensured in the *Introduction into Marketing* that the teacher is able to assess on-line through the electronic system. After logging on, the teacher is presented with a list of students to be assessed by him/her. The teacher chooses a particular student and views all the assignments with the student's answers (Figure 2, left). The electronic system indicates the maximum number of marks to be allocated to this assignment. The teacher compares the student's answer with the answer model. All the elements that a good answer must contain appear in the answer model. The teacher



On-line assessment by teachers

Figure 2

The screenshot displays a web-based assessment interface. At the top, a navigation bar includes 'Module-assessor - Microsoft Internet Explorer aangeboden door @Home' and a menu with 'Beoordeling', 'Begeleiden', 'Beefj', 'Evaluatie', 'Extra', and 'Help'. Below this, a task titled '01. Wat is marketing?' is shown with a 'Zelftest' status. The interface lists 'Beoordelingsstatus' as 'Gescreend door het systeem' and shows a list of questions: 'Opdracht 1', 'Opdracht 2', 'Opdracht 3', 'Opdracht 4', and 'Opdracht 5'. The main content area displays the text of 'Opdracht 1' and the student's answer. Below the answer, a table provides teacher comments and scores for each question.

Antwoord student	Cijfer de docent	Commentaar van de docent
geen idee!	0	
Vaak worden marketing en verkoop nog als twee tegengestelde zaken gezien. Verkoop heeft dan tot taak de afzet te stimuleren en marketing heeft dan tot taak de afzet te beperken. Het is echter niet het geval. Het is juist dat marketing en verkoop samenhangen. Het is echter geen sprake van deze tegenstelling.	0	De student komt niet ter zake.
Definitie van marketing: Het is de activiteiten, gericht door rijkshandelen, die erop gericht zijn om cultuursacties te bevorderen, te vergemakkelijken en te verspreiden.	7	Uitstekend antwoord, goede argumentatie.
Bedrijfs verricht geen marktonderzoek bij het op de markt brengen van een nieuw product. Haar productontwikkelingsproces bestaat uit exploratie, productontwikkeling en lancering en mist daarbij de screening, de selectie van de behoeften van haar (potentiële) afnemers en zet ook de sterke en de zwakke punten van het bedrijf niet af tegen de kansen en de bedreigingen uit haar omgeving.	1	Goede gedachten-gang, verkeerde antwoordkeuze.
Verkoop	1	Redenatie ontbreekt.

Note: students' answers and teachers' comments are fictional.



can then indicate on-line how many marks he/she is willing to award to the answer. Until assessment of the student is finished, the assessment of each assignment can still be adjusted. When the teacher has finished assessing a student, he/she clicks on a particular button and the assessment has then been finally completed.

Electronic examination ensures that no paper routes are necessary. Students do not need to send their written examinations to a central point. Nor do the examinations submitted need to be manually distributed and sent to assessing teachers. This signifies a gain in teacher productivity and an improvement in efficiency.

This way of working makes it possible to assess examinations throughout the year with a group of three teachers. Students can submit their examinations at any time they want. Teachers know their individual review periods in which they are responsible for correcting the assignments that are submitted electronically by the students.

### **How to achieve objectivity in assessment**

The *Introduction into Marketing* is assessed by a team of three teachers. How is it ensured that the assessment of a student is independent of the teacher who carries out the assessment? In the electronic system objectivity is guaranteed by what is known as the answer history. The teacher can easily see how other teachers have assessed students' answers on a particular question (Figure 2, right). This makes it possible to achieve unity in assessment between different teachers. In addition, the answer history makes it easier for teachers to allocate a score to an answer. A teacher benefits from the way other teachers have already weighed up this assignment. The answer history reveals statements such as: 'I deduct one mark for lack of good argumentation'.

### **What to do about cribbing**

There is a fear in electronic examination that students will exchange answers among themselves. Cribbing quickly becomes visible to teachers as a result of using the answer history. With the answer history, the teacher obtains a list of all answers students have submitted on a particular assignment. It is immediately clear whether two answers are exactly the same.

Nor does cribbing guarantee a pass for the student. This is due to the specific design of the examination procedure in which two case studies are drawn at random by the electronic system. The student can only partly decide for him-/herself which case studies will be assessed. In addition, a total of more than 100 examination assignments are submitted (for sixteen different examination case studies) before a student can be assessed. This discourages students from enlisting someone else to take the examination.

We also wish to prevent successful students from circulating 'correct' answers. Students who have already passed therefore only receive limited feedback on errors they have made in their answers. The exercise environment provides feedback on errors made, while the examination environment is solely intended to test how well the student masters the acquired skills. Errors made in the examination are therefore only explained verbally. Note that students of the Open University take part individually in courses. They start the course at different dates and they have different study speeds. Moreover, students do not know one another, which limits the opportunity to exchange 'correct' answers.

### **Survey results**

The course has been evaluated among students. Five students were asked to give their opinion on various aspects during the course. These students have filled in two questionnaires. One questionnaire handled issues such as study load and difficulty, design of the course, usefulness and ease of use of the electronic manual. Furthermore, questions were asked on whether the electronic manual was convenient and stimulated study. This questionnaire was completed at the end of the course. The second questionnaire was filled in during the course and had open questions on whether the students encountered problems with specific assignments. This could be a technical problem but also a content-related problem. The general opinion of these five students was that the electronic study manual was easy to use and motivated further study of the textbook and related study materials. Hardly any technical problems were encountered. Students unanimously reported to be very pleased to work on assignments related to practical situations.





In addition, we have administered an evaluative survey among 32 students that finished the course. Seventeen students completed the questionnaire (response rate of 53.1 %). Again, questions were directed at the usefulness and the ease of use of the electronic manual as well as the study load and difficulty of the course.

The questionnaire contained mostly open questions. On the question "To what degree do you think that the use of the electronic manual offers added value above the use of a paper manual" the majority of the students (10 out of 17) was very positive, stating that the electronic manual was very efficient and easy to use. One student explicitly stated that the electronic environment stimulated the digestion of the study materials and encouraged the practical engagement in the taught discipline. Two students did not have a preference for either an electronic or a paper study manual and five students did not see any additional advantages of an electronic manual compared to a paper manual.

On the question whether the specific design of the examination suited the course, five students disagreed, while twelve students were very positive. One student stated, "This method gives students the possibility to choose two cases that are closely related to their own interests". One of the disagreeing students thought that it would be better if all four cases were chosen at random by the electronic system. He/she was afraid that students would focus on the two cases of their choice and only have a half-hearted attempt on the other cases. All students reported to be pleased to work on assignments related to real-life situations. Table 2 shows several statements of students regarding this issue. Students reported an average appraisal of 7,9 on a 10-point scale (10 being the maximum score) satisfaction level for the course. Students stated that the *Introduction into Marketing* is "an entertaining course, an excellent way to test competencies".

Besides the evaluation among students, two teachers were interviewed for their experiences with the assessment of the course. The teachers stated that the on-line assessment was easy to use. The electronic assessment environment gives the teacher a view on both the student's answer and the answer model. Teachers set great value to the fact that they do not have to search their papers for the answer model and the

Students' statements	Table 2
- "Very good course that encourages you to a structured and analytic approach of practical situations"	
- "You can better understand the marketing concepts and theories by applying them to practical situations"	
- "This course forces you to think!!!"	
- "The material encourages you and makes you crave for more"	
- "The course makes marketing alive"	
- "You learn a lot by analysing the cases"	
- "It is enjoyable to alternately read and make practical assignments"	

opinion of other teachers on similar answers. They stated that the electronic system made the grading process accurate and very pleasant to do. Furthermore, the teachers stated that the system made it possible to grade a student's performance within half an hour. In comparison, at the Faculty of Management Sciences, an average competency-oriented course has an assessment burden of one hour per student. The specific design of the *Introduction into Marketing* course therefore reduces the regular assessment burden of a course by fifty percent.

### Summary and concluding remarks

At first sight, competency-oriented education does not appear to go together with cost-effectiveness. It involves an assessment with open questions, which usually puts a large burden on teachers. This article has given an example of a course that achieves competency-oriented education with a relatively small assessment burden. First, the *Introduction into Marketing* course is geared towards the development of competencies among students by giving them assignments that pertain to practical cases. Moreover, the extent to which the student has acquired these competencies is examined in the course. Therefore, the examination is in close keeping with the way in which marketing has been taught. Second, effective use has been made of all the benefits that the Internet offers to keep down the assessment burden on teachers. As a result, teacher productivity is raised and teaching costs are kept down.

Evaluations of the course showed that students as well as teachers are very satisfied with the electronic system. This course could provide the basis for other courses that aim to achieve cost-effective competency-oriented learning materials. Innovative solutions like this course make it possible to meet the challenges of current education.



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### Key words

Competency-oriented learning, educational innovation, eLearning, e-learning, examination, marketing, distance education.



# The existential dimension in training and vocational guidance - when guidance counselling becomes a philosophical practice



**Finn Thorbjørn Hansen**

Ph.D., lecturer,  
Guidance Research  
Unit, The Danish  
University of Applied Sciences

## Learning to Be - a lacking competency in Lifelong Learning

It is not the value-related and existential dimensions of the approach to guidance counselling and professional training courses that have been at the top of the agenda when one has wished to study and develop the fields of work within what is broadly referred to as Vocational Training and Lifelong Learning. Most of the training and vocational guidance research and policy-making in this area has been focused on a more pragmatic and benefit-oriented approach to guidance counselling and vocational training courses with the aim of strengthening the formal training competencies of and qualifications of the student or employee on the labour market (1).

But this primarily utilitarian approach to guidance counselling now appears increasingly to have been problematised. This can be illustrated by two examples.

The following quotation from Serge Blanchard appeared in the foreword of the agenda for the conference held by Cedefop in 2000 in connection with the Memorandum on Lifelong Learning: 'The fundamental question of guidance counselling is what it aims at. Should we aim to help certain individuals to create themselves within, well-defined, forms of identification? Or should we help them question the identities on the basis of which the person creates him/herself and perceives others? These questions are linked to whether we retain or transform the structure of social relations. The question of guid-

ance counselling leads us therefore inevitably to ask questions of a political, philosophical and ethical nature' (*AGORA X: Social and vocational guidance, Thessaloniki, 19-20 October, 2000*, p. 1). One topic at this conference was how greater focus can be put on the totality of the individual's working life and private life, as it appears increasingly to be the aim of many knowledge-based enterprises in western knowledge society to create such a context. Terms such as 'commitment', 'innovative and personal competencies' and 'teambuilding and mentoring' are thus linked in management and human resource development theories to value management and to an enterprise culture where the employee, to a greater degree, is urged to join in the attempt to develop creative forums and working environments where there is greater integrity between the person's own life values and ideals and professional attitudes and identity (Kirkeby, 2000; Thyssen, 2002; Gørtz, 2003). Only when this 'specialist integrity' has taken place, according to the message, will it be possible to experience the deeply committed and creative employee who also dares to take personal responsibility and enter into compelling communities for matters which are not controlled just by the motive of higher pay or the possibility of advancement on the career ladder but by values which the person concerned fundamentally cherishes.

Another aspect, also touched on at the conference, was that the individualised employee and this person's self-managed and lifelong learning also requires a more holistically oriented approach with the focus on the val-

**With the individualisation and multiculturalisation of the world of education and training and the world of work, a new need has arisen to develop a more value-based and existentially oriented approach to guidance theory and vocational training courses. The pluralisation of ways of life and the late-modern confrontation with the authorities have created changed conditions for understanding the relationship between theory and practice, guidance and training, guidance and profession. To a greater degree than previously, guidance has become a question of creating greater integrity between a person's professional specialisation and the life values of the person concerned. Key terms in this connection may be authenticity and formation (Bildung), concepts and an approach that necessitate a philosophical framework of understanding and guidance practice. This article describes the background to a research cooperation initiated with the aim of studying these changed conditions for guidance and whether and how the theory and practice of philosophical counselling could be a possible way of qualifying the ability of the counsellor to handle the more value-related and existential dimension of the counselling situation and vocational training.**

(1) However, this does not apply to the part of the research on training and vocational guidance which in the last ten years has been focused in relation to constructivist and systemic guidance theory (Peavy, 1998) and research on ways of life (Rahbek, 1988). The focus here to a great extent is also put on the value dimension, directed partly towards the individual person's own 'system of values' and partly towards the values and norms which lie in the way of life and culture the practitioner of the profession is in.



This research approach is, however, primarily oriented on the basis of a social constructivist and cultural-sociological point of view, which does not look at the more existential and philosophical aspects of the value clarification dimension. In the following, an existential philosophical, primarily hermeneutic (Gadamer, 1960), and existential psychological access to training and vocational guidance will be established. Clarification of differences and similarities between the systemic and existential approach to guidance will not be dealt with in the framework of this article.

(<sup>2</sup>) For some readers - particularly within the Anglo-Saxon and utilitarian tradition - the term 'existential' will perhaps appear diffuse or either be understood as another expression of 'personal development' or narrowly linked to the philosophical direction represented by the French philosopher J.-P. Sartre. The term 'existential' is not to be understood in that way in the present article. In using the term existential I wish, following philosophers such as Søren Kierkegaard, Karl Jaspers, Gabriel Marcel, Martin Buber and Martin Heidegger and existential psychologists such as Emmy van Deurzen-Smith, Irvind Yalom, Rollo May and Victor E. Frankl, to point to the ethical and ontological dimension of existence which the rationalistic and social-constructivist as well as functionalist and instrumental-pragmatic approach to the world does not have an eye for. This dimension - or existential experience - arises in the borderline situations of existence. That is to say in the encounter with something which fundamentally is experienced as larger than oneself and which has absolute character and decisive significance for one's life. Such as for example when a person is born or dies, falls in love, encounters depths of sorrow or great joy. In brief, where one's existence for a while is shaken or fundamentally put in a new perspective, so that the question of the meaning of life becomes central and insistent. As the Danish historian of ideas Hans-Jørgen Schanz describes the existential experience, it is in those moments 'where man encounters something which is beyond what can be humanly calculated or produced; where man experiences that something is given - or something is taken away - which has the character of something absolute.' (Schanz, 1999, p. 24). The term 'the existential' is therefore not linked to concepts of 'personal development' and self-realisation, as these concepts remain in a psychological understanding of the human being and the world which does not reach beyond the subjectivism and anthropocentrism which existential philosophers wish to problematise.

ue dimension, *because* such an approach could be a way for the individual of creating greater continuity, meaning and integrity in the many and perhaps differing training and career progressions which the individual experiences over the course of time. And here we are thinking not just about a *professional continuity* and progression but also context and meaning in a more *existential* sense (<sup>2</sup>). Many shifts in training and vocation for adults in the 35-50 age group can thus be seen as an expression of an existential change of track and process of searching for a new orientation and meaning in existence. This is sometimes described as the result of a midlife crisis and sometimes as a decisive turning point in life. As the Danish professor Johan Fjord Jensen writes in *Frirum - Voksenpædagogiske problemer og analyser* (= Free spaces - problems and analyses of adult education) (1998): 'Adult education is accordingly not just education aimed at the acquisition of further vocational experiences, possibly as an element in lifelong learning, nor is it merely education for temporarily filling spare time with all the opportunities and interests loosely belonging to it. It is a form of education that takes man's second change of track seriously as a basic existential problem, which affects all people when they are set free to develop as adults. Understanding adulthood existentially is understanding the processes that take place in the middle of adulthood, as processes of the same fundamental significance as those that take place during childhood and during the development of the young person into an adult at the first change of course.' (Ibid., p. 65).

It was in this connection that the phenomenon of *Philosophical Counselling* was presented and discussed at Cedefop's conference as a possible new way of developing guidance geared towards handling this value-related and existential dimension in the learning processes for lifelong learning in both a holistic and critical manner. This is to ensure that the person seeking guidance counselling does not just relate narrowly to that person's current profession but also to his or her life as a whole and the life values on the basis of which the person currently thinks and acts. I shall return later to what philosophical counselling is, and why it may be important to incorporate a critical dimension into the approach to guidance counselling in relation to those enterprises which encourage (or indirectly force) their em-

ployees to create greater integrity between their professional attitudes and life values.

The second example of how one in current research and education and training policy wishes to bring a value-related and existential dimension into the discourse on lifelong learning is found in a report by the OECD and SFSO from 2000 (*Definition and Selection of Competencies: Theoretical and Conceptual Foundations (DeSeCo)*, 2000). In this report, twelve western countries were asked which ten core competencies they considered most essential for the development of lifelong learning. In this connection, it is worth mentioning the criticism which the whole project as such encountered. Two major items were criticised, in particular in the Norwegian sub-report (Knain, 2001). Firstly, the authors claim that there is a need for a far more differentiated approach to the concept of competency. As they write: 'You cannot speak of key competencies without at the same time explaining the cultural, ideological and value-related context in which competency functions. If this is not done, the concepts of competence may result in imperialism by the strong over the less strong.' (Knain, 2001, p. 11). Secondly the Norwegian expert group felt that the OECD's approach to promoting lifelong learning was constructed too instrumentally. The only purpose of lifelong learning seems to be 'mastery' and 'usefulness'. In their own words: 'The intrinsic value and formative nature of learning are placed in the background. Moreover, there is little emphasis on values and ethical reflection as a basis for action. This underscores the technocratically-influenced usefulness perspective.' (Ibid., p. 18).

A recurrent criticism of the OECD's procedure with regard to the determination of key competencies for lifelong learning was thus that the educational ideals and broad key competencies were reduced to empirically measurable indicators and thus to a far too positivistic view of knowledge and science. This point of view seems to open the way to a more general critique of the dominance which empirical experience-based science (including in particular psychology and sociology) has had for educational research and policy in this area. The OECD was thus urged to develop some clearer distinctions in the future between when one was dealing with a general philosophical/scientific discourse *or* a discussion on conditions for social and educational policy. However, I



would like to add that a distinction ought also to be made between when we are dealing with a philosophical, a psychological *or* a sociological approach. For just as it may be regarded as a form of imperialism if only one culturally determined understanding of the concept of competence prevails, similarly there will be an obvious risk of imperialism if, for example, only the psychological and sociological approach is adopted in relation to research and education policy on lifelong learning.

The OECD seems to have considered these criticisms and taken them into account in, a later synthesis report from 2001, covering the whole project (Trier, 2001). This is most clearly expressed in the final conclusion, which is entitled: 'Where is the good life?' Here the author of the report, Uri Peter Trier, reminds the reader of the famous *Delors Report by UNESCO in 1996*, which says that education is built on four basic pillars: Learning to Know, Learning to Do, Learning to live together and live with others and Learning to Be.

The first three pillars or competencies, the author claims, are well covered today in terms of both research and education policy, but the fourth pillar (Learning to Be) seems to be lacking. As he concludes: "... the 'To be' competencies have some difficulty holding their own against the 'To do' and the 'To know' competencies. The imbalance is very apparent. (...) 'Joy of Life' may seem like a rather indefinite quality. However, at the end of a text on key competencies the question: 'What is it all about?' is not irrelevant. To reflect further on this question would be challenging and exciting." (p. 54).

In 1999, the OECD tried to avoid a chiefly functional approach to the definition and identification of competencies by inviting a number of philosophers to contribute <sup>(3)</sup>. But this philosophical approach and dimension in competency thinking appears to be lacking in the majority of the reports and papers that have been produced since then on lifelong learning, particularly if one is aiming to look for competencies in lifelong learning which can promote greater attention to ethical and aesthetic topics.

The UNESCO report Learning to Be: *The World of Education Today and Tomorrow* by Edgar Faure (1973) chose to focus on the

dimension in the world of education concerned with 'the person's complete development - mind and body, intelligence, sensitivity, aesthetic appreciation and spirituality'. This dimension was later taken up by the Delors Report in 1996, but supplemented with the three other core competencies. The idea of 'the whole person' is an idea which is generally acknowledged to go back to the Greek concept of *Paideia*. In Ancient Greece, school meant a free space for free people to pursue their desire for gaining understanding so as to learn about the world, humanity and want the good. And teaching at that time was seen as a creative calling, a vocation, to arouse the pupil to admiration and to 'existential attention' and a desire to do what the pupil, after critical reflection, considered to be what was true, good and beautiful. This is what Socrates also described as ethical self-care.

In modern times this approach to teaching has tended to be described through terms such as formation (*Bildung*) or *Liberal Education and Self-formation*. Concepts which, in contrast to the concept of competency, are oriented towards the ethical and existential dimension (the contemplative side) of human life and thoughts. Within this concept of education, philosophy and art are understood as ways of approaching human life and thoughts in a non-instrumental manner. Or, as the French historian of philosophy Pierre Hadot writes, a fundamental distinction can be made between a habitual and benefit-oriented perception of the world and humanity, which is necessary for the establishment of human life, and a non-pragmatic perception, which is represented by the philosopher and the artist: 'In order to live, mankind must "humanise" the world; in other words, transform it, by action as by his perception, into an ensemble of "things" useful for life' (1995, p. 258). But if we only live in the functional and 'man-made world', we never learn what it means to *be*. Because being a human - a whole person embedded in the world - requires us to understand that we are in a world and a nature which is different from 'our world'. Philosophy and art can, Hadot says with reference to Bergson and Merleau-Ponty, help us to be more fully present in the world, in existence as such. 'The utilitarian perception we have of the world, in everyday life, in fact hides from us the world qua world. Aesthetic and philosophical perceptions of the world are only possible by means of a complete transfor-

<sup>(3)</sup> This contribution can now be found in Canto-Sperber Monique, Dupuy Jean-Pierre, 'Competencies for the Good Life and the Good Society', 2001, reproduced in Rychen Dominique S.; Salganik Laura H. (eds.), 2003.



mation of our relationship to the world: we have to perceive it for itself, and no longer for ourselves.' (Ibid., p. 254).

According to Hadot, this means learning to be, learning to live in astonishment and in the present moment, and thereby the possibility of experiencing fullness of life and a deeper meaning, something which Rousseau also called 'le sentiment de l'existence' and which the Canadian philosopher Charles Taylor uses to determine what 'authenticity' is (Taylor, 1991).

If this point of departure is adopted and if 'joy of life' is associated with such a contemplative and 'authentic' approach to the world and other people (cf. Buber, M., 1996, and Taylor, 1991), a different and more philosophical approach must presumably also be required to clarify key competencies for life-long learning than the one we find used in the OECD approach. But can the fourth competency, *Learning to Be*, be described through a particular set of specific competencies at all? Hadot gives us the following answer: 'Everything which is "technical" in the broad sense of the term, whether we are talking about the exact science or the humanistic science, is perfectly able to be communicated by teaching or conversation. But everything that touches the domain of the existential - which is what is most important for human beings - for instance, our feeling of existence, our impressions when faced by death, our perception of nature, our sensations, and a fortiori the mystical experience, is not directly communicable.' (ibid., p. 285).

If this lived existential experience is important to our ability to be, how can we as teachers and counsellors work with this dimension without destroying it?

Is such an existential experience by definition outside the range of education? Is it possible to guide to authentic choices?

Phenomenological and hermeneutic philosophy will, like Hadot, say that it can be done. But then education and guidance counselling must be re-thought, so that this fundamental community of wonder, which presupposes an orientation towards an open space, from where the idea can come (Gadamer, 2004/1960, p. 347) become possible in the encounter between the guidance counsellor and the person seeking counselling.

### **Research project: 'Philosophical counselling and practical knowledge in vocational training'**

This is the background against which the Guidance Research Unit at the Danish University of Education has planned a four-year research project, the aim of which is to study whether it is possible to develop a *philosophically oriented* theory and practice of guidance counselling which will be better able to work with and understand the value-related and existential dimension in guidance and teaching. This research project has been established in co-operation with the Centre for Practical Knowledge at Bodø Regional University in Norway, where researchers are also in the process of defining possible research approaches for the understanding of the value-related aspects of the relationship between theory and practice (Nergård, 2003). What these two research units have in common is that they are also responsible for two university training courses. In Denmark, a Master's degree course in guidance counselling was established in the autumn of 2004 where the philosophical approach is at the heart of the course, and where one of the Master's degree modules is exclusively concerned with philosophical counselling, which from an international point of view is an innovation. In Norway, a major university course has been organised in the Centre for Practical Knowledge since 2000, in Practical knowledge for professions such as teachers, social workers and nurses.

The joint research project 'Philosophical counselling and practical knowledge in professional training courses' uses two approaches:

□ a theoretical (philosophy and history of ideas) study of philosophical (counselling) practice viewed in relation to key concepts linked to the theories of practical knowledge, and

□ a practical phenomenological-hermeneutic study of the philosophical counselling practice undertaken in specific professional Bachelor's degree courses and professional contexts.

The overall aim is thus to develop

□ some (introductory) analytical strategies for the relationship between philosophical



counselling, practical knowledge and vocational training courses,

- an empirical basis for how philosophical counselling in practice reveals itself and what experience the guidance counsellor and person seeking counselling acquire along the way, in order to finally
- develop a framework of understanding and a knowledge base for philosophical counselling in professional training courses.

### Practical knowledge and authenticity

The focus at the Centre for Practical Knowledge in Bodø, to which seven professors in philosophy, psychology and education are attached, is on analysing which research approaches can be adopted with regard to the tacit knowledge involved in the professional work of the educationalist and counsellor. A key research question in this context is what forms of instruction and counselling can be developed so that this form of knowledge is articulated and reflected. By practical knowledge, the researchers understand the unique entrenched experiences the professional practitioner has acquired over a period of years in the practical field and which over the course of time has crystallised into a certainty, expertise and intuition for what is the appropriate thing to do both from a technical and from a human point of view at the moment concerned. As Aristotle says, it is not knowledge in the sense of *episteme* but knowledge in the sense of *phronesis* that is placed at the centre (MacIntyre, 1981; Dunne, 1993; Gustavsson, 2001). This knowledge is mostly tacit and closely associated with the specific actions in the specialist's profession and professional environment.

Their research interest is directed towards how this tacit practical knowledge can be articulated or 'released' through practice-based theory and research. This is partly done by using the students' narratives on their profession and by means of a hermeneutic process of reflection, where, through the interpretation of these 'texts' - narrative and ethnographic descriptions of the concrete practice - greater clarification is attained on the underlying understanding which seems to be incarnate both in the approach of the researcher (and counsellor) and in the specific practice of the practitioner of the profession.

What is essential to the success of the counsellor (and the practice-oriented researcher) is that they have gained their *own* experience in the field - i.e. they have themselves noted what it means to be in this specific professional situation. When, for example, concepts are developed for research purposes, this is generally done at the epistemological level - i.e. the researcher wishes to develop concepts which are common to all the specific practices he or she studies. But one can and should also develop concepts which are unique to the specific and singular practical experience that constitutes the object of one's guidance and research. The aim of the practice-oriented researcher as well as the guidance counsellor must therefore be to help the person seeking counselling to *articulate* the insight and concepts that lie in the practice. The individual practices have to be illuminated from within - through their own concepts. The task of the counsellor (and the practice-oriented researcher) is therefore to find his or her way into the *underlying understanding* of the person seeking counselling as expressed in both words and actions in the practice of the person concerned.

At the Centre for Practical Knowledge, one is also concerned with and interested in the ethical dimension when dealing with 'releasing' an insight into the moral dilemmas and problems and experiences which might lie in the specific practice of the practitioner of the profession. The same approach applies here: one is concerned with the underlying and lived understanding in practice in order to then develop concepts and theories which can release each individual's unique perspective on and experiences of the ethical dilemmas and problems so as to become a reflected understanding as well. When they speak about the ethical dimension of practical knowledge, it is either

- in connection with the integrity imposed on the practice-oriented researcher or the professional practitioner by the agreed professional ethics and ideals of the profession,
- in relation to the specific moral challenges, peculiar to this professional practice,
- more generally linked to the corporate culture of this profession (e.g. the occupational environment and forms of behaviour in a school), or



□ the general moral horizon of meaning, which is incarnate in the culture and lifestyles of society (cf. MacIntyre, 1981).

As mentioned earlier, some have chosen to describe these ethical aspects in vocational training courses using Aristotle's concept of *phronesis*. This refers to the practical wisdom that lies *within* the given professional practice, and that contrasts on the one hand with the abstract theory (*episteme*) on the professional practice and the instrumental technique or didactic method/approach (*techne, poiesis*) for this professional practice.

In contrast to the Centre for Practical Knowledge, the Guidance Research Unit has chosen to take as its point of departure the diagnosed individualisation of the world of education and training and the world of work (and in particular vocational training courses (Fibæk et al., 2003)), where concepts such as *self-formation* (Schmidt, 1999; Hansen, 2003; Hammershøj 2003) and *authenticity* (Taylor, 1991; Fibæk, 2004; Nyeng, 2004) are of central importance. For an increasing number of people, work is experienced as a path to self-realisation and as an element in their personal development. Questions such as: 'How can this work give me deeper meaning? Why, fundamentally, do I want to be a teacher? How can I once again become enthusiastic about what I do?' are often questions which occupy a person in middle adulthood, who has long worked in a particular profession, or questions on which a young person wants to be guided in his or her choice of educational course or occupation. With the idea of Lifelong Learning and Guidance, there appears to be a growing need to find 'one's own leitmotif' in the process of education and formation one goes through during many years of education, training and work.

Where the Bodø researchers thus look primarily at the exercise of the profession, we in the Guidance Research Unit are occupied with the *attitude to life* which the practitioner of the profession shows in his or her training or profession, that is to say how the person concerned from an existential point of view sees a totality and meaning between his education and training/work and his life and existence as such.

Within recent Danish vocational research, attempts have been made to capture this

more existential search process and trend towards individualisation in the world of education and training and the world of work through the concept of *authenticity* (Fibæk, 2003). Authenticity is understood to mean a particular form of professionalism in which great integrity is developed between a person's professional attitudes and the person's own life values. It is only when there is agreement between these that the professional practitioner will experience commitment to and deeper meaning in his work. Acquiring such integrity and authenticity through practice necessitates new forms of education and training.

Per Schultz Jørgensen, a professor of social psychology, writes that a new type of teacher must be created in the future. The teacher must not just possess solid professionalism and educational insight, he or she also has to take on personal responsibility for his or her professionalism and put him or herself and his or her attitudes at stake when teaching. 'The teacher today has responsibility for the authentic nature of the learning process. The teacher has to be engaged with his person in the process of creating credibility'. (Ibid., p. 102). Such an authentic learning process can be acquired through practice, he claims, through 'individual training' based on the 'Socratic know-thyself', where the student teacher strives to develop an 'individual philosophy which can function as a strengthening of the individual professionalism towards greater coherence and individual authenticity'. (Ibid., p. 105).

This is followed up by the professor of education Per Fibæk Laursen, who regards the concept of authenticity as a continuation of the general individualisation and relativisation of values and the late-modern confrontation with the authorities. In late modernity, the teacher and the educationalist have to a greater degree become their own authority. Instead of just letting their pedagogic thinking and practice be governed by a corpus of abstract and universal theories and models for good pedagogy, the teacher and the educationalist have to learn to a greater degree to take as their starting point their own unique experiences and practical knowledge and from there pursue their pedagogy with their own authority (Fibæk, 2003).

Taking as his basis findings such as Charles Taylor's (1991) and some empirical studies





of Danish *folkeskoler* (primary and lower-secondary schools), Per Fibæk Laursen later in his book *Den autentiske lærer* (= The authentic teacher) (2004), develops an ideal conception of the authentic teacher with the following characteristics. The authentic teacher is

- driven by a 'sense of calling' (he or she has to have enthusiasm for his or her job and feel the occupation and the teaching profession to be personally meaningful),
- he or she *lives* his or her ideals, is
- open-minded and respectful towards the ideas and behaviour of fellow human beings,
- takes his or her own intentions seriously and therefore works for an everyday life and an environment which can favour the attainment of these intentions. In order to be able to develop this scope for authenticity,
- the teacher must be in dialogue with his or her colleagues and
- patiently retain his or her dreams and goals. But the test of authenticity according to Fibæk stands in practice when
- one has to find one's *own* individual style for what instruction best suits one's abilities and means. This decision, Fibæk writes, is often made at a non-rational and intuitive level. As he quotes one of the interviewees as saying: 'You have to try and see what it feels like in your stomach.' In other words, the authentic choice also depends on whether one fundamentally feels good about it, and whether it feels to be the right thing for *me*. In conclusion, he writes about authenticity: 'Authenticity is acting in accordance with one's life values. One thus has to have gained clarity about one's values and attitudes to be authentic.' (2004, p. 107).

It is our hypothesis in the Guidance Research Unit that individualisation and the consequent focus on the value-related and 'authentic' has created a need to rethink the relationship between academic theory and pedagogic practice (as considered among others by Polanyi, the Dreyfus brothers, Ryle and Schön) in a more ethical and existential direction.

Concepts such as 'tacit knowledge', 'reflection-in-action' and 'practical knowledge', as

used in present-day literature on the subject, are primarily conceived in relation to the limited and specific professional context the professional practitioner is in. When, in recent years, it seems to have become important to the professional practitioner for professional practice also to be experienced as authentic and meaningful, not just in the professional sense, but in the existential sense too, there are two new relationships which also need to be considered in vocational research. These are the *self-relationship* of the professional practitioner and his or her meaning-searching relationship to the profession and his or her life *as a whole*. This is what the French philosopher Michel Foucault in his later works also describes by the concept of *rappor* de soi and the Greek concept of 'ethical self-care', respectively <sup>(4)</sup>.

It is our assumption that whereas practical knowledge for example in Polanyi's and Schön's sense is linked to specialist knowledge *in practice*, knowledge which, as it were, has emerged out of specialist practice, it is a different form of *existential practice* and *wisdom* (not knowledge) which is at stake when it comes to the professional practitioner's experience of authenticity, integrity and meaningfulness in relation to work and life viewed in a holistic perspective.

A possible way of defining this more existential dimension of the professional practitioner and practical knowledge could theoretically be to study whether the widely used concept of *phronesis* fundamentally covers this dimension. In any case, when the interpretation of the concept of *phronesis* is only linked to the relationship of the individual to *polis* and not to *kosmos*. That is to say, when the concept is only understood in relation to the societal, political and cultural knowledge horizon and the everyday activities demanded within this context, and is not considered in relation to the individual's meaning-seeking relationship to existence as such. <sup>(5)</sup>

Working on the basis of such an existential and holistic approach to the world of education and training and the world of work in terms of guidance and instruction necessitates different forms of reflection and dialogue than one has been accustomed to. Instead of the concept of *phronesis*, it might be useful to include the Socratic concept of *eros* in our thinking, because this concept

<sup>(4)</sup> Foucault's concept of self-relationship and ethical self-care has recently been applied by the Norwegian professor of health-care science Kari Martinsen in her description of the existential relationship of the nurse to her own profession and to the experiences of care, anxiety, hope, loneliness, enjoyment of life, meaninglessness which nurses can encounter on a daily basis (Martinsen et al., 2003). See also my analyses of Foucault's concepts of ethical self-care and practices of freedom in (Hansen, 2003, chapter 1.)

<sup>(5)</sup> The Danish historian of ideas Dorthe Jørgensen has critically confronted the instrumentalisation of the university world and the turning of it into a market by distinguishing between the way of life of the wage-earner, the career person and the self-employed (including also the intellectual). While the first two are governed by an instrumental consciousness, where the profession is turned into a means for something else (*poiesis*), the self-employed person is governed by a searching, creating and playing consciousness, where the profession is a value in itself (*praxis*). The ideal according to Dorthe Jørgensen must be to live one's profession as a *praxis* in the Aristotelian sense. But this means also viewing one's profession as part of a larger and not necessarily professional totality, and as part of what one is. This in turn will require the professional practitioner to see a deeper meaning with the profession in relation to life as such and his or her own life values. While the first two ways of life are primarily linked to the concept of knowledge - the measurable and controllable, the third way of life according to Dorthe Jørgensen is linked more to the concept of wisdom. What is decisive is therefore the fundamental attitude the professional practitioner has to his or her profession. (See Jørgensen, 2002, 2003).



entails a constant transcendence of the given frameworks and a constant striving to viewing one's life in a larger and more meaningful perspective. In this respect, I share the preoccupation of Søren Kierkegaard and Hannah Arendt, among others, with Socrates' maieutic form of dialogue and his search for wisdom (the concepts of *eros* and *tò kálon*), because this searching and constant striving verges on wonder and fundamental openness and listening to what is not yet said and has not yet been made possible. This 'standing in the open' liberated from considerations of practical utility (*techne*) without fading into abstraction (*episteme*) was something which, also preoccupied the German philosopher and hermeneutist Hans-Georg Gadamer (Gadamer, 2004/1960). He describes - also with reference to Socrates - this ability to stand in the open through the concept of formation (*Bildung*). Using this concept of formation he finds a way of defining the process and thinking needed to provide space for this existential searching and striving. Gadamer too refers to the concept of *phronesis* to describe the individual's particular and lived relationship with the world. However, the *eros* concept, one could say, is the individual's reflected *act of relating* on the one hand to this lived relationship with the world and on the other to the great narratives of humanity about the true, the good and the beautiful. It is in the attempt to create a totality from this that existential practice arises. A practice and a totality which can always only be 'on the way'. Or, to put it differently, the way one looks at and includes 'the lived understanding' in one's thinking and practice differs according to whether one looks at it from an Aristotelian or existential philosophical point of view (cf. *Kierkegaard After Macintyre*, ed. J. Davenport & A. Rudd, 2001).

By including the aspect of authenticity, a new meaning is thus added to the concept of vocational training and guidance, as the term *vocation* etymologically means 'calling' or 'letting oneself be called'. In other words, only when the guidance counsellor encourages the person seeking counselling to 'listen to his calling', that is to say what one deep down considers to be meaningful training or a meaningful occupation, only then can the person seeking counselling make an actual (authentic) and qualified choice. And thus, in the eyes of education and training policy-makers, also a more efficient choice, since the young person will not be

as likely to drop out due to lack of motivation (Bjerg, 2000; Simonsen, 2000).

### Pitfalls of authenticity

Nevertheless, one should, in my opinion, also take a critical attitude to this interest in authenticity and 'the authentic teacher'. After all, can this striving for authenticity not too readily end up in the direct opposite - i.e. in narcissism, self-aggrandisement and attempts to 'make oneself interesting' - in brief, non-authenticity? And can this individualisation of the world of education and training and the world of work, with its demands for commitment and authenticity in everyday activity, not lead to the indirect exploitation and disciplining and ultimately instrumentalisation of the students' and employees' thoughts and actions, so as to ensure that they meet the requirements of the late-capitalist labour market in the best possible manner? Is the endeavour to create greater agreement between private life and working life a subtle form of control and exploitation of the last free space of the employees - their spiritual life and what they fundamentally consider to be valuable in existence (cf. Foucault's concept of *subjectivation* and *gouvernementalité*)? And is Per Fibæk Laursen right in saying that authenticity is the same thing as personal integrity?

The answer to the last question here must be no. Authenticity is not (just) a question of personal integrity. It is a question of existence. Authenticity is not related to a subject, but to existence, to *Dasein* (Heidegger). Existential philosophy, which makes use of the concept of authenticity, is in fact a radical critique of subjectivity. Authenticity is therefore not a question of the integrity and self-awareness of the subject. It is merely a prerequisite, a first phase before there can be talk of authenticity. Authenticity is primarily related to a radical openness to the world and what man is. The existential psychologist and professor Emmy van Deurzen-Smith writes very aptly (1995) that authenticity is not in itself a sufficient virtue. Viewed in isolation, authenticity may be synonymous with madness. As a decisive sounding board for authenticity, a different striving of a more philosophical nature is required, an existential and ontological searching process where one not only tries to live in accordance with one's fundamental life values, but also and persistently problematises and asks what man, the world and the good life



are, not just for me, but for mankind as such. Or, as van Deurzen-Smith writes: 'at the moment one becomes capable of living authentically, one will need to find new criteria to be able to decide what is right and wrong.' (Ibid., p. 89).

If authenticity is only considered within a traditional psychological framework of understanding, where authenticity is only understood as a question of personal integrity and social relations, we have not escaped from the *subjectivism* and *anthropocentrism* (i.e. centredness around what is created by man) and self-realisation culture, which Charles Taylor and existential philosophy and psychology wish to stem.

Striving for authenticity can only be qualified if it is also and simultaneously understood and practised as a *process of formation* (*Bildung*). That is to say an aesthetic and philosophical searching process where one reaches out beyond the 'psychological space' and the 'man-made world' and into the 'philosophical space' in an encounter with 'the world in itself', where there is a substantive relating to what the true, the good and the beautiful *are* in general that is central (cf. Pierre Hardot's previous description of the utilitarian and existential approach to the world).

Thus, when the individual philosophy and life values of the professional practitioner are to be dealt with at the *substantive* and *normative* level, a psychological and process-oriented supervisory approach does not appear to be sufficient.

### **Philosophical guidance practice as a space for the formation of authenticity**

It is against this background that the Guidance Research Unit has set itself the research task of studying whether philosophical guidance practice (Philosophical Counselling, Philosophische Praxis) could be a possible way of qualifying the professional practitioner's striving for authenticity and ability to work on and have a perception of the existential dimension of their work. It is thus our basic assumption that philosophical guidance practice provides us with a specific idea of how it is possible to work with the existential dimension in vocational education and training in general without being trapped into the three pitfalls of striving for au-

thenticity: psychologism, instrumentalism and moralism.

More specifically, I (Hansen, 2004) have proposed a search model for philosophical guidance practice, which is to be seen in the field of tension between the philosophical concepts of *authenticity*, *formation* and *existence*, or as Søren Kierkegaard would say in the interplay between aesthetics, dialectics and ethics (Kierkegaard, 1846; Hansen, 2003). Only by taking these philosophical concepts seriously will it be possible to free oneself of the psychological, social constructivist and utilitarian vocabulary which primarily has lain and lies in the therapeutic tradition and craftsman tradition, and which has formed the background to a large part of guidance philosophy in the 20<sup>th</sup> century.

Philosophical counselling practice has roots in the history of ideas going back to the understanding of philosophy as a way of life and life art in antiquity (Hadot, 1995; Nussbaum, 1994; Shusterman, 1997). But the first modern philosophical counselling practice (*Philosophische Praxis*) was proposed in 1981 by the German philosopher Gerd Achenbach (1984). Today, philosophical counselling practice is an internationally known phenomenon both in the area of education, in the social and health-care sector and in the business world and within Human Resource Development <sup>(\*)</sup> (Lahav & Tillmanns, 1995; Zdenka, 1997; Schuster, 1999; Raabe, 2001, Herrestad, 2002, Hansen, 2003).

Firstly, philosophical guidance is characterised by the focus being put on content, what the counsellee says and not on the underlying psychological factors, forces and motivations which may lie behind what is said. As the Canadian philosopher and philosophical counsellor Ran Lahav expresses it: 'First, in order to count as philosophical, an investigation must deal primarily with ideas in the public realm - that is, concepts, conceptions, assumptions, theories, etc. - rather than exposing concrete events or processes (cognitive, emotional, etc.) hidden inside the person's head (which is the task of psychology).' (1996, p. 262).

This immediately raises the question whether philosophical counselling may thus be condemned to remain an area of abstractions and general ideas, far away from practical life. The answer to this must be no. The specific nature of philosophical guidance prac-

(\*) The 7th international conference on philosophical counselling ('Philosophical Practice - A Question of Bildung?') was held at the Danish University of Education, arranged by the Guidance Research Unit in co-operation with Copenhagen Business School, Centre for Management and Art, on 3-6 August 2004. See [www.dpu.dk/konferencer](http://www.dpu.dk/konferencer).



tice is that it is neither theoretical nor practical philosophy in the academic sense (hence only a specific philosophical - theoretical-academic - discourse on ethics, aesthetics, politics, religion and existential topics) or applied philosophy. Philosophical guidance practice is a philosophical and maieutic practice, which primarily starts out from the life expressions and relationships with the world the counsellee is in and not least the lived philosophy which is incarnate in the concrete practice of the person concerned. '... Our way of being expresses a certain conception of reality, although not necessarily a coherent and unitary theory (our life is often inconsistent). In other words, a person's way of life expresses various ideas about the world, and as such is subject matter for philosophising. To examine a person's life philosophically is to examine the understanding which he or she lives (not just thinks): to examine how coherent it is, expose its hidden presuppositions, analyse its basic conceptions and values, and so on. This suggests that the aim of philosophical self-investigation, in the context of philosophical counselling, is to explore the counsellee's 'lived understanding', namely, the world as 'understood' by the person's emotions, behaviour, thoughts, hopes, desires, and entire way of being.' (Ibid., p. 265).

The philosophical practice is a *praxis* in the Aristotelian meaning of the word, i.e. an activity which is not a means for something else, but which has value in itself. In addition, this *practice* is philosophical. And the specific nature of 'the philosophical' is not just familiarity with and skills in particular philosophical theories and methods. What distinguishes the philosophical practitioner from the academic specialist philosopher, the philosophical educationalist, the psychotherapist or the constructivist and goal- and function-oriented training and vocational counsellor is the way in which the philosophical practitioner tackles a topic, a dialogue or a problem. The philosophical practitioner does not - like the educationalist, the counsellor or the therapist - use philosophy to solve or treat or merely 'reflect' a problem. This would be an instrumentalisation and vulgarisation of philosophical practice. As Ran Lahav (1996) says, problem solutions may perhaps be side-effects of a philosophical guidance practice, but the overall purpose is and remains to create an investigative community directed towards a striving for wisdom. And that means a con-

stant asking about one's own basic assumptions and those of others and about a world *outside* the person's constructed image of the world, so that the counsellor and the person seeking counselling experience moments of genuine wonder. What Gadamer would describe as 'laying something open and placing it in the open' (Gadamer, 2004/1960, p. 348), Martin Buber an 'encounter' and I will describe as the actual authentic learning, where for a short while one loses the specialist and personal foothold and is cast out in a process where one is seriously challenged in the encounter with the Different or the Other to take a position on what one knows again and whether it continues to provide meaning in the existential sense (cf. Bollnow, 1969; Buber, 1966).

This form of wisdom - in contrast to the traditional academic specialist philosophy - is, as has been said, not something which is sought independently of the lived life and the concrete dialogue which takes place between the philosophical counsellor and his dialogue partner. For the philosophical practitioner it is, as has been said, decisive that a point of departure is taken in the counsellee's *lived* relationship with the world and the philosophical assumptions which appear to be taken for granted in order to then critically examine these assumptions together with the counsellee. For example, problems with one's family, one's own personality or one's career often involve *conceptual* issues (e.g. the significance of the concepts of friendship, love or self-respect), *ethical* issues (moral obligations towards one's children or the moral correctness of staying with or leaving one's partner), *existential* issues (what is a valuable or authentic way to live?) and similar topics. In contrast to a process of dialogue and reflection, where one endeavours to place what is said within the framework of a system of abstract *theoretical knowledge*, e.g. of a medical, sociological, psychological or specialist philosophical nature, and where one is preoccupied with what causes and structures might lie *behind* a given life expression or life experience, the aim here conversely is to create a space for a philosophical examination of what is said, starting out from the counsellee's own life experiences and the expression which lies *before* the counsellee, in the person's concrete relationship with the world and being-in-the-world. As the Norwegian philosopher and professor Anders Lindseth, who has



worked theoretically as well as practically with philosophical counselling for more than 20 years, writes: 'Philosophy is not a science which attempts to gain an overview of the world as an object or collection of objects that are to be ordered in a systematic manner, but an attempt to capture life experience as a continuing project, as something which proceeds in time, which is expressed in time and which requires philosophical reflection in order to find its expression.' (Lindseth, 2002, p. 3).

The unique feature of the philosophical counselling approach, in contrast, for example, to the constructivist approach (Peavy, 1998) is thus that one does not merely attempt to reflect the other person's system of values so that the person becomes more aware and reflective on this. One also takes a critical questioning attitude to the person's 'construct' and brings in other fundamental philosophical ideas, which can put the relationship with the world in perspective and engage the person concerned in a fundamental wonder. This is done precisely in order to reach beyond the knowledge horizon and construction of the reality which the person is currently thinking and living within. 'While psychotherapy aims mostly at modifying the person's current psychic forces and processes, Philosophical Counselling attempts to take him to new ideational landscapes outside himself. In this sense, philosophising in Philosophical Counselling is not a solipsistic endeavour, it does not limit itself to the domain of human generated ideas, but rather a dialogue between human life and the broader horizons in which it is embedded.' (Lahav, 1996b, p. 261).

The philosophical counsellor, in contrast to the psychotherapist and the constructivist counsellor, is particularly sensitive to the topics in philosophy which relate to man's life experiences. He/she has developed a special philosophical sounding board and ability to bring what the counsellee says up to a level where it becomes generally interesting and can be linked to topics in philosophy, literature and religion. In this way, the counsellee is encouraged to look at a problem or a life expression not merely from a personal or professional point of view, but from a general human and philosophical point of view, which often results in the connection between what the person considers to be valuable and meaningful in existence

being linked to a greater degree to the personal or occupational problem or attitude under discussion.

Briefly and far too schematically - because ultimately it is not possible to present one method for what philosophical counselling is other than a constant questioning of one's own basic assumptions and those of others - the philosophical counselling process can be described as consisting typically of five dimensions or phases (Lahav, 2001).

Initially, and entirely in line with the therapeutic tradition, the philosophical counsellor will attempt to adopt a fundamentally open attitude to the 'universe', the life expression he/she encounters in the counsellee's 'narrative' on the topic, which the counsellee wishes to philosophise on. Here and first and foremost a *phenomenological approach* is used.

The second dimension of philosophical counselling consists in a *philosophical-hermeneutic approach*, where the counsellor listens out for the philosophical basic assumptions in the counsellee's both imagined and lived approach to this subject. What fundamental life topics and meanings (e.g. the nature of the self or of freedom, the value of love or success, etc.) can be linked to the counsellee's concrete experiences and narrative. In this context, it is important that the philosophical counsellor does not impose a topic on the counsellee's life, but allows it to emerge from the dialogue at its own pace in a way which is true to the counsellee's own experiences and attitudes. It is the counsellee's sovereign decision what philosophical topic or question to continue working with.

The third dimension is linked to *critical reflection*. Here, the complexity of the chosen philosophical question is dwelt upon for a long time, without rushing to a rapid answer. The role of the philosophical counsellor is to help - as a Socratic birth helper - in examining and deepening the 'individual philosophy' in the counsellee's *conceived approach* to the topic. He/she does this among other ways through the Socratic forms of questioning (Hansen, 2000) and by presenting to the counsellee other fundamental and alternative philosophical ideas about and approaches to the subject. These philosophical ideas and approaches must never, however, be presented as authorities but



as raw material, which the counsellee can choose to examine, modify, criticise or go beyond, depending on whether these ideas are felt to be an aid in illuminating the counsellee's unique way of living.

It is also important here that the philosophical counsellor always presents many different and mutually contradictory philosophical ideas and approaches to the subject, in order to urge the counsellee him- or herself to adopt a position and develop his/her own independent standpoint in constant relation to the person's own life and practice. The language in which the philosophical dialogue is conducted should not be abstract, hypothetical or academic, but take as its point of departure the counsellee's everyday language and life.

In the fourth dimension, the philosophical counsellor returns to the counsellee's concrete situation to examine how the chosen philosophical topic is expressed in the counsellee's own life. What basic assumptions on the topic are in the counsellee's *lived understanding*, and in what way could the counsellee's concrete way of life be seen as a response to the chosen question. The new understanding, which was developed in the previous examination, will be used as a sounding board for reflection, but the focus is on the basic philosophical assumptions which appear to be taken for granted in the counsellee's everyday life and practical approach to the subject. This fourth dimension is primarily characterised by an *existential form of reflection*.

The last phase of the philosophical guidance process is concerned with how the counsellee can develop a personal response to the philosophical question which was chosen from the start. At this point in time, the counsellee has ideally acquired a broader understanding of

- the topic,
- some alternative approaches to it, and
- the way in which the question is expressed and becomes relevant to the counsellee's life. The time has now come for the counsellee to develop his/her own personal response and approach to the question.

This is not just a theoretical matter, because it must involve his or her everyday attitudes

and way of relating to others and to the whole of his or her attitude to life as such. And this is naturally a process, a *life-long act of formation*, which cannot be concluded within any given courses of guidance counselling. It is rather an attitude, of learning and wonder, which can be taken out into further life and work and which some philosophical counselling theoreticians simply call living a present-minded and philosophical life, or, as Socrates puts it, living a life with ethical self-care.

Professor Anders Lindseth, who is also attached to the Centre for Practical Knowledge at Bodø Regional University, and I will introduce the approaches to philosophical counselling mentioned above in the research project 'Philosophical counselling and practical knowledge in vocational training', but shall also attempt to develop new forms and approaches which are better suited to the conditions and learning and work situations encountered in Danish and Norwegian vocational training (?). The practical approach of this research project will be aimed at trying out the practice of philosophical counselling in various professional contexts. This is currently planned to take place at selected training colleges for teachers and educationalists and nursing schools in Denmark and Norway.

The focus of counselling practice here will be on the values which

- the course of studies demands from the students,
- which the periods of practical training create and
- how the students (and the teachers in the teacher training college) view the relationship between their professional specialisation and their personal life values (the authenticity aspect). The method which will be used to collect experiences will be partly based on action and field research and partly on a new phenomenological-hermeneutic method, which Anders Lindseth and Professor A. Norberg (2004) from Umeå University in Sweden have developed.

We hope that this research will enable us, both in theoretical and practical terms, to contribute to the question which introduced this article, namely how can one work with the more existential dimension (Learning to

(?) I have, for example against the background of the Neo-Socratic form of dialogue (Nelson, 1965; Boele, 1998) and in connection with a development project on competency development at folk high schools and independent boarding schools, initiated by the Danish Ministry of Education in 1999-2001, developed a special form of 'Socratic dialogue group', which today is used as a value clarification tool at many different types of schools in Denmark (Hansen, 2000; Heidemann, 2001).



Be) of educational and vocational guidance and under the perspective of Lifelong Learning and Guidance.

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## Key words

Philosophy of education, philosophical counselling, authenticity, Socratic dialogue, learning to be, lifelong guidance.



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# Training and work organisation:

## An action-research study in a sales and distribution company

**Alda Cristina Bernardes**

*Master's degree in Occupational Sciences, Instituto Superior de Ciências do Trabalho e da Empresa; Manager and Training Officer at El Corte Inglés in Lisbon*

**Albino Pedro Lopes**

*Associate Professor of Human Resources, Department of Management, ISCTE.*

### Introduction

This article is based on a master's dissertation in Occupational Sciences entitled "Training and the Organisation of Work: an Action Research Trial in a Sales and Distribution Company", completed at the *Instituto Superior de Ciências do Trabalho e da Empresa* (ISCTE) in 2003.

In this project, the concept of training goes far beyond the traditional models based on traditional education and formal training courses or schemes. It also goes far beyond the idea of training by catalogue, in which a series of people enrol with the intention of learning something when given a choice of existing defined, structured courses.

We regularly find that the results of training courses are not measured, whether or not there has been a change in practices or in the organisation. This is because, on one hand, other statistics take into account other aspects such as the number of courses given or trainee satisfaction and, on the other hand, because training is designed out of context, without taking into account real problems and the actual people involved.

Training should not be based only on a choice of courses. Rather, it should be clearly oriented towards demand, towards meeting the real needs of a particular setting and its people. As a means, not an end in itself. It should be defined on the basis of real problems and situations that are being regularly assessed

and monitored in a cyclical process, guaranteeing that learning occurs in a work context and that the organisation is being constantly improved. In this age of uncertainty, to ensure employees' performance, organisations have had to ensure that work situations are also teaching situations, according to Le Boterf (1989) - always with a view to permanent improvements in economic and social performance and a reduction in dysfunctions.

This project could be defined as a transition from a system of *training schemes* to one of *action training* (Le Boterf, 1987): training is no longer based on programmes or courses that are defined and structured at the outset and organised without prior analysis and without considering the interests of all parties. Training not only focuses on an assessment and study to identify the problems, but also on existing knowledge and practices. It is all identified by the involvement of the parties, while the training objectives are defined on the basis of the real situation in the field and on work practices.

But learning should not only occur during the training scheme; it should become a part of practice so as to serve as a basis for ongoing improvement. The idea is to go from a training model that is centred on the individual to one that is aimed at the learning organisation. The implementation of this project will mean that training is organised on the basis of existing problems and needs or on the interests and knowledge expressed by the individuals themselves. When devis-

**This study seeks to define a method of designing work-linked training, based on day-to-day work practices and the collaboration between all those involved. From diagnosis to evaluation, no training is designed or given without considering the opinions and interests of the parties involved. The method used is based on action research (AR) and on the cyclical process that characterises it: planning - acting - observing - reflecting. Training officers take on a new role here: they become facilitators and the driving force behind training practices. The conclusion is that there are reasons for considering more dynamic approaches in the design and organisation of training, based on research and reflection and with the participation of all parties involved.**



ing action training, it is important to draw out each person's knowledge and introduce this individual knowledge into that of the group and organisation.

The first part of the article refers to the theoretical fields inherent in the subject of the study and also addresses action research, which is used here both as a research method and for training purposes. All the research is based on a real, concrete situation: the design and organisation of ongoing training (technical aspects and knowledge of the product) for sales assistants. It is a case study of a large department store in Lisbon (<sup>1</sup>), in which each of its departments has the characteristics of a small retail outlet and the whole is a true network of small business units.

The subject of sales also has implications in terms of training. Being in direct contact with the customers, sales assistants are a strategic group for the company. According to a study conducted by Cedefop (1995:14), what is necessary and "increasingly to be found is training aimed at improving knowledge of products and employees' attitudes and behaviours, in order to improve the company's image".

Because of work organisation changes and increasingly well-informed customers, it is necessary to have well-trained, customer-oriented sales assistants who are specialised in the products they sell. The question is how to achieve this most effectively. We cannot focus only on jobs or only on people when the aim is to increase work skills.

The article describes the method followed in designing and organising effective training which takes into account conditioning factors in the organisation of work. There are sales assistants who work in shifts and there are others who work part time; there are highly specialised sales areas with only a small number of sales assistants while there is a shortage of specialists in some retail areas. Creativity is required and it is necessary to design the training to go far beyond traditional classroom courses.

The explanation of the whole process and the understanding and reflection of the scheme do not refer to a law or a theory but to an understanding of this particular situation. In this project, the criterion for defining practices is therefore more important

than the criterion of representativity. The idea was to use the complex, concrete situation in which the scheme took place and then, after understanding it, set out principles of action. In this case, problem solving involved everyone's participation and the training officer, a researcher, was the co-producer of change and knowledge.

The second part of the article first addresses the process that brings out a new training paradigm. It is necessary to analyse the limits of the traditional training model, which was based on the instrumental, adaptive perspective of training processes with structured courses and a vision of humans as being programmable. In fact, in many schemes designed in the past, more thought was given to means than to results; at the heart of the training were the trainer and his or her command of the contents. Today, it is important not only to bring training close to the workplace but also to bring the workplace to training. In this increasingly close link, what matters is results *in action* not results *of the scheme*. In linking training situations and work situations, we recognise work situations as being instructive. Moreover, each person is considered to have a training potential gradually created through their knowledge and personal experience and interests. It is this fount of knowledge, experiences or attitudes that it is important to bring out in each person and place at the service of a whole community.

We then classify the types of schemes and how they were implemented in this organisation. We give the results of some case studies: forms of training put into practice, linked with work and following the same method, based on the cyclical process characterising action research.

In the third part of the article, we reflect on the impact of the study on the organisation and make suggestions for future research.

## Theory

The study is based mainly on the constructivist model of training, theories on the qualifying and learning organisation and the theory of human relations.

The action training project implemented is based on trainee-oriented training, on training rooted in the work itself, and on train-

(<sup>1</sup>) The company is well established in its country of origin, Spain. It has more than 70 stores with 1.5 million items on sale and a net surface area of more than 820 000 m<sup>2</sup>. The Lisbon store was opened in late 2001 and has a sales area of 60 000 m<sup>2</sup> and 1 900 employees. It is not only the first in a network that the company plans to open in Portugal but is also a milestone for the group as it is its first international foray. The training departments in Spain and Portugal answer to the company's Human Resource Directorate. The company has its own training facility at each of its stores.



ing oriented towards reflection and research into practices, involving the exchange of experiences between people. These principles are included in the assumptions of the constructivist training model, as they are based on the idea that occupational practice is, in itself, an important way of constructing knowledge. The experience of specialists and reflection on their practices take precedence. The subjects build on their own knowledge through direct intervention on the object.

Learning organisations often employ the concept of “working for projects”. The project team is not formed according to the chain of command, but brings together the skills needed to solve a problem. *Qualifying* companies and *learning* companies <sup>(2)</sup> are always evoked in the dynamics of change, which, in turn, is associated with the idea of progress. A qualifying company is one that improves individuals’ skills; a learning company develops collective skills <sup>(3)</sup>.

Human relations theory suggests the ongoing improvement in practical knowledge, including of low-skilled workers, has a key role to play in increasing productivity. The receivers of training are not just objects of teaching but subjects with whom others work and who analyse themselves. Training is thus aimed at the integral development of the adult. The action research method itself is also based on a humanist conception: people are valued and supported in developing their skills and abilities.

The process used to evaluate training was based on Kirkpatrick’s four-level model of training evaluation (1998) <sup>(4)</sup>, in which different dimensions of training can be assessed. Level 1 measures satisfaction, level 2 assesses learning, level 3 evaluates behaviour and transfer to the work context and level 4 measures results for the organisation.

### Action research (AR) as a training method

The purposes and functions of AR can vary considerably. It may be used for investigation, research or action purposes and its function may be critical or one of action, with a view to achieve change and specific training purposes. As training is aimed at change, both individual and collective or company changes must be considered. AR as a training strategy is to be implemented

in this company to help training officers, trainers and participants or their supervisors develop their abilities and to foster an attitude of self-questioning.

### Methods used

The study is based on reflection about the reality and concrete practices in the organisation of training. It was supported by the use of a research diary. Different methods were used to organise the different forms of training in the various phases of the process.

### Interviews and questionnaires with feedback

In this study, all the training is based on problem solving and is part of an AR loop in which the situation to be changed is analysed and assessed on the basis of the needs felt by the employees themselves. In the case of classroom training, the situation is identified and assessed on the basis of a questionnaire answered by sales assistants and their supervisors. The questionnaire is drawn up on the basis of a preliminary assessment made by the training officer or researcher on the basis of meetings and conversations with supervisors, buyers and suppliers. In the second, feedback, phase, the information gathered is analysed by the Training Department and sent to the trainers, who then use it to decide on training subjects and contents. The questionnaires were used in 10 different technical or product training courses for 72 sales assistants.

Where on-the-job training was concerned, the trainer herself used an evaluations scale for several parameters with 78 sales assistants from 16 different sales areas, before and after observing them in their actual work environment.

During assessment of training by project, we also used semi-structured interviews with the managers of floors involving clothing alterations, with the seamstresses in the service studio, with sales assistants and with despatch operators.

### Problem solving with experiments in the field

The loop that characterises AR consists of an integrated cycle of activities in which each

<sup>(2)</sup> The double-loop learning concept developed by Argyris and Schon (1978:140) is similar to the cyclical AR process. The learning process is cyclical and has *discovery - invention - production - generalisation* phases.

<sup>(3)</sup> Le Boterf (2004:167) addresses the nature and development of collective skills and says that the gains in productivity or performance of a work unit or group are based more and more on the interaction between members of a working group and on the quality of the relationships developing between them.

<sup>(4)</sup> Kirkpatrick’s model was chosen as it was the most common and recognised by training practitioners and specialists, although it has been criticised by many authors. In 1955, Philips proposed a level of evaluation different from the four mentioned, referring to return on investment (ROI) to determine to what extent the impact achieved justify the investment made. In 1987, Brinkerhoff suggested a different level, in which he included the didactic assessment phase. Holton III (1996) and Swanson and Holton III (2002) have criticised the four-level model because it focuses on reactions in relation to performance results. On the other hand, Holton III (1996:6) says that Alliger & Janak in 1989 considered that the cause-effect involved in the different levels of the taxonomy had not yet been demonstrated. Swanson and Holton III (2002) said that Kirkpatrick’s model was a results valuation model and suggested a results assessment system as part of a process consisting of four components: a process, results areas, a plan and tools.



phase learns from the previous one and determines the next one. Generally speaking, the process begins with a general idea or a situation that needs improving. After deciding the scope of action and conducting preliminary reconnaissance of the field of action, the researcher or trainer draws up a plan of action. S/he defines ways of monitoring the effects of the first step, the strategy to be used and the circumstances in which it will be used in practice. Data are gathered from each step implemented and then described and assessed. This assessment provides the data that will be used to prepare a new plan, and so on. Kemmis and Elliott (1982), quoted by Winter (1989:13), regard the process as a loop between the analysis of practice (essential for bringing about change) and the implementation of changed practices (essential for increasing understanding).

All the authors whose works we researched agree that AR involves participation, collaboration, knowledge acquisition and social change. The researcher achieves these aims by implementing a loop consisting of planning, acting, observing and reflecting. The purpose of AR is not so much to eliminate the problem but to develop the situation: thus, small steps in the right direction by those involved are all valued.

These four elements or cycles of the spiral<sup>(5)</sup> (*planning, acting, observing and reflecting*) are based on the idea that, in each cycle, the researcher plans before acting and reflects on findings and methods after acting. The reflection at the end of each loop fuels the planning for the next loop. As a result, something is learnt in each of these phases. In other phases, we confirm previous learning or find that the proposed learning is inappropriate. This is what Gummesson (1991), quoted by Dick (1993:14), says is a *hermeneutic spiral*, where each turn of the spiral builds upon the understanding flowing out of the previous turn. Each research cycle therefore corresponds to the underlying action in individual reflection. After each cycle, the planning, action and reflection are criticised. And this is done as the data and documentation are gathered for the AR itself.

While action training is designed to solve existing problems, AR is used as a means of obtaining information about a situation in order to act on it. Instead of waiting for

solutions from the outside, the specialists directly investigate the problems placed before them in order to find partial or total solutions. This helps the specialists to achieve a better understanding of the problems and the possibilities for intervention. The organisations to which they belong can then change the way they work, question their culture and rethink their relations with the community, and the community's knowledge of both the professional group and the company's community is enriched.

There is always permanent iteration and interaction between the research and the action, and knowledge is produced by changing the existing circumstances. Training by research can be achieved with different strategies and activities which, after an analysis of practices in the field, lead to training, through which knowledge is manifested and situations are changed.

### Evaluation method

During on-the-job training, one questionnaire was given to the 16 supervisors of the 16 sales areas and another to the 78 participating sales assistants eight weeks after the beginning of the follow-up. After the same period, the trainer who had done the monitoring filled in her on-the-job observation forms, assessing the different items for each participant and comparing them with the assessment made at the beginning of each sales assistant's follow-up.

In the simulations during classroom training, one questionnaire was given to the 10 supervisors of 10 different areas and another to the 72 participants (although only 48 from seven different areas answered), 2 to 3 weeks after attending the course. An informal questionnaire was given to training providers after the same period.

In training by project - specifically training in clothing alterations - one questionnaire was given to the five different apparel areas, to three despatch operators and 12 sales assistants from the alteration team, four months after the teams went into action on each floor.

After-sales information on the number of events, customer complaints and costs of garments was also gathered before and after the project.

(5) For Kemmis and McTaggart, quoted by Dick (1997), the phases of the typical spiral or cycle are as follows: 1a) deciding what questions we want to answer. If it is the first stage of the process, it can be a broad question like "how does this system work?" 1b) deciding who to ask and how to ask. 2) Asking (acting) 3a) checking the information gathered 3b) interpreting the information 3c) checking that the choice of participants and the method of gathering information are suitable 3d) checking the data and interpreting them with the applicable literature.



### **Changing the training paradigm: from training scheme to action training**

This action training project emerges as a result of a strong wish to reorganise the company's existing training model in order to help bring about ongoing, in-depth organisational change, in the sense given by Quinn (1996). In this sense, it means going beyond the research process and, for the writer's professional practice, represents an opportunity for critical reflection.

In terms of company training techniques, I have been working on training design and now intend to take a critical view of the way in which training has been organised in the company. The idea of this self-criticism exercise is to define a valid model for the company based on a process to be applied to all training coordination, thus providing a prospective as well as a retrospective picture.

The whole project was born out of my reflection, initiated by the training technique and supported by field notes and my research diary, on my own daily practices. The result emerging from my reflection and reading was a series of ideas and possible different ways of doing, analysing and organising, which were first put into practice during my work activities.

The idea of the project is to test a concept of training design by means of a cyclical process, with the final goal of its serving as a basis for the organisation of training in the company. In order to achieve this, we not only defined a form of action for different training situations based on needs and objectives, we also implemented the model in a series of training courses. All the examples have a point in common and that is the fact that the working environment was used in some way in all of them in order to activate the training situation. Another common feature is the fact that we tried to achieve the *production-mobilisation-acquisition of knowledge* (Barbier, 1996), by inviting the target population to get involved.

The main goal set for the Action Training Project is to *ensure that technical training produces results in terms of knowledge, skills or organisation of work*, on the basis of the objectives defined.

The problem arises later, during evaluation, when we want to find out whether in fact knowledge and practices have been acquired and whether they have been transferred to work situations. It is not always easy to gather data in the field that can clearly be attributed to training. For one thing, improvements may not be exclusively due to training, in that there are always many contributing factors. At the same time, questionnaires for participants and supervisors - the easiest and most practical means of getting feedback, which should be used in any case - only reflect individuals' experiences. It is therefore important to know not only the results and the product of the training, but also the way in which these results were actually achieved.

The method used in the project seems appropriate in that there is constant monitoring and dialogue between training design, trainers, supervisors and participants, which go beyond the training itself.

What is at stake here is a change in the process, the creation of a new model; a new way of designing, organising and evaluating training that was already being done in the company. We also feel that the situations described do not exhaust all the possibilities for designing training linked with work.

This concept of demand-based training stipulates that the design of all training is based on the needs and interests of individuals and of the organisation. We assume that training must have measurable results (some harder to measure than others). These must be known and analysed and used not only as output but also as an input for ongoing training and work process improvement. We also assume that training should be assessed, not on the basis of the number of courses given or the number of training hours per employee, but of tangible results for each individual or group, in terms of the organisation and of work processes.

While before training was merely classroom courses, with this project it becomes development in formal, non-formal and informal contexts. While courses were once organised in modules and on the basis of content, the idea now is to base the content and the process in which the training occurs on how work is organised. The definition and structure of the training depends on what is



happening in the whole work context, what is there, the difficulties, the needs, the problems, the (ab)normal situations and on what people already know.

In the past, there was absolutely no flexibility; in simulations, the training providers merely "gave" another course on the basis of the model and programme that they already had. Conversely, this project is based on an empirical, inductive approach. In the old model, the trainees learnt the theory and went on to put it into practice. In the current model, the idea is for classroom training to ground, systematise and consolidate knowledge and learning that participants have already gained from practice. General considerations will thus be inferred from situations experienced by the participants rather than from theorising.

According to Lesne (1984), in the past, training was based on the *transmission of knowledge*, in which the trainer was the transmitter of knowledge in an *asymmetrical relationship*, and action was taken in isolation, without considering the department with all its members. Action training is intended to develop the effectiveness of a group through the development of all its members. For this to happen, we must encourage the sharing of knowledge and know-how, self-training and working groups.

Indeed, in the recent past, training in the company was based on and practically limited to a trainer-trainee relationship, whereas action training aims at a multidirectional relationship including internal parties (trainer, supervisors, buyers, sales assistants and co-workers) and external parties <sup>(6)</sup> (suppliers, customers, competitors, trainers...).

Another aspect that separates this project from the old training model is the relationship with know-how. Before, it was a question of using knowledge, while now the idea is to construct know-how. There is now a decisive commitment to experienced individuals who are agents of change. In addition, it is the employees themselves who define or suggest the training subjects.

This change in paradigm includes the acceptance of the new role that training has to play in the organisation. It should begin with a rethinking of its role in the Human Resources Department and in the organisation. This has to do with the need to antic-

ipate developments in the organisation of work. The proposed project assumes a reduced focus on Training as a department and a room, seeing it more in terms of action, context and individuals, with a view to building a learning organisation <sup>(7)</sup>. It also focuses on measuring results at the different levels mentioned above.

### Implementing the different types of action

Another purpose of this study was to organise training into three different types, according to Barbier's classification (1996) <sup>(8)</sup>. It is not a question of deciding which of them is best or most valid. They must be considered on the basis of each situation. No type of training is better than any other. Ideally, they should be complementary. They are all useful and necessary and this study gives an appropriate description of how to design, organise and assess them, always in connection to work, in order to guarantee their success and suitability to different situations.

### Training in work situations

This concept of training is designed to construct a personalised training path in a wide variety of work areas implemented in accordance with the type of work organisation. Although it all takes place in the workplace, some training happens on the job, while other training is separated from it. Training aims not only to perceive the work process and work relations in general but also to acquire content by placing it into real situations. The need for this training is a result of the constant influx of new sales assistants to each of the areas.

*Training in work situations* (Barbier, 1996) as part of this project includes all technical training in dressmaking, focusing on practices with a trainer in a work context. Nevertheless, the model is equally valid for training involving tutoring, generally during the recruitment phase. In each type of training, work situations and context are used to activate and accompany learning.

Instead of a trainer providing content to a passive trainee, here it is the employees themselves who actively seek information - and thus themselves generate, rather than just use, know-how. This requires getting the participants to learn how to learn and

<sup>(6)</sup> External bodies include suppliers as businesses and as trainers; customers, to the extent that we take into consideration the training and knowledge that sales assistants can acquire in their relations with the customer, (although analysing it is not one of the purposes of their job); and competitors, in that some training can be held on the supplier's premises with the participation of the competition's employees also.

<sup>(7)</sup> According to Senge (1990), there are five *disciplines* that can contribute to the systemic thought inherent in learning organisations: "adoption of systemic thought", "fostering personal mastery of one's own life", "challenging prevailing mental models", "creating a shared overall vision" and "promoting learning in a team".

<sup>(8)</sup> *Training during work situations, training from work situations and training in actual work situations.*



how to reach into know-how that has hardly been formalised, as a way of taking part in the joint transformation of people and work - their performance and their organisation.

This type of training is intended to get individuals to construct and absorb know-how from the instruments, contents and processes of their own work. No immediate, direct change in work situations is expected. There is, we hope, a lot of know-how that can be mobilised in their current work situation or transferred to a similar situation. The basic technical and vocational know-how is acquired by using the work situation and the work is the starting point for the training.

Once a person is recruited and evaluated by the trainer, an assessment <sup>(9)</sup> is made on the basis of items defined for each sales area. The trainer and trainee both then identify their current knowledge of each item. The trainee is informed of the objective that is set for each item, depending on the area or the job to be done. After that, trainer and trainee define lines of work and support so that she or he can achieve this goal.

As this process involved over 400 sales assistants from five different floors in dressmaking alone, it proved necessary to hire a trainer just for these subjects. This became possible when a dressmaker who was also an experienced trainer joined the Training Department. The process consisted of continuously analysing work situations and practices with all those involved, in order to pinpoint training needs.

In this type of training, the target population's training goals and paths are mapped out - but only partially. They emerge progressively from work situations and can include moments of non-formal training with the trainer, self-training or even informal on-the-job training. These situations are provided for but not planned, given that we are talking about personalised training paths in which each participant has his or her own rhythm, needs, interests and motivations.

The trainer monitors the sales assistants, from identification to evaluation, as follows:

□ The trainer joins the sales assistant to be monitored and makes an assessment of his or her knowledge and know-how in a real

situation and then, together, they decide on a score of 1 to 10 depending on each area.

□ The trainer indicates the objective for each parameter. Strategies and activities (theoretic and practical assignments, PC exercises, local support with customers,...) are defined on the basis of each individual's knowledge, needs and interests.

□ The trainer monitors each individual and reformulates their follow-up plan.

□ After eight weeks of follow-up, the trainer gives the sales assistant a grade.

### **Training from work situations**

*Training given from work situations* (Barbier, 1996) consists in occasional formal training courses, meaning, in this case, classroom simulations. Their purpose is to improve specialised knowledge or knowledge of the product. Training is triggered usually by work situations and products sold; it is usually administered by specialists or trainers sent by suppliers. Training is scheduled on the basis not only of individuals' interests and motivations but also of the specific reasons for providing it, which are discussed in advance with the supervisor and buyer. The training is designed and oriented on the basis of the knowledge expressed (not only on doubts but also on individuals' perception of the products). The work contents in each area are used as training tools, as the intention in the classroom is to rebuild and finalise knowledge. We try to recreate the work situation; sales assistants' time in the classroom is intended to improve or correct their practices in work situations.

Organising the training requires advance preparation involving participants, supervisors, buyers and the suppliers themselves. The training officer is there to encourage and mediate the process, watching the signs from all parties, always intent on ongoing improvement. We always start with reflection on the results of previous training so that they can be used to plan subsequent courses. Individuals are asked to reflect on their practices.

The planning phase of each simulation takes into account employee awareness. People often do not realise what they know or what they can or cannot do and this is an obstacle to developing skills. The training is

<sup>(9)</sup> This assesses not only knowledge but also know-how. To do this, the trainer watches the sales assistant work or, if this is not possible, gives him or her the assessment questionnaire. The grade given to the trainee should be defined jointly by the trainer and trainee.



intended to help the sales assistants become aware of their abilities. They have to participate and experiment until they can acknowledge their abilities and use them - even if only unconsciously and spontaneously.

Internal and external partners contribute to this process. The trainers not only point out what is all right but also what can be improved; they observe what people do or do not know. Before the training, they will have had access to the sales questionnaires assessing the sales assistants' knowledge. The questionnaires and other information tell the training officer and trainer what the sales assistants know best, what they know less and what they do not know at all. The training officer outlines the training, establishing goals, methods and strategies (practical in nature whenever possible) on the *training form* to be sent to the supplier's trainer, who will fill in the remaining fields. This ensures that the training is planned on the basis of the goals and interests of all those involved. An assessment is made three to four weeks after the training, when the supervisors and the participants in the training answer questionnaires.

### **Training in work situations (training by project)**

Cases of *training in work situations* (Barbier, 1996) are devices aimed at the production or modification of working methods with a view to better collective effectiveness. All the players involved should have the opportunity to speak, either to describe their work and the problems that they come up against or to help find solutions to the problems. This is called *training by project*, because it leads to the development of individuals as a whole and also because it uses work methods and processes that are similar to project methods. The groups that are formed (according to the need to solve different problems) meet more or less regularly. The meetings precede the training, which will be based on the observation of and reflection on them. In this situation, the learning comes from the individuals as the builders of know-how. No one pushes know-how on them; it is only necessary to encourage them to think about the way they work for knowledge to emerge.

Training in its usual sense is not the main purpose of these meetings. Training oc-

curs because the employees involved are both the subject and the means of the change we want to bring about. The people who intervene and are formally asked to speak are deeply involved. The didactic aspect comes from the work method itself, which is the main content of the training. The didactic process comes from something that already exists, from work practices used by different groups, each with different experiences. In the crossroads of know-how and situations information is exchanged and new know-how is built. This results in an ongoing teaching process, one which focuses not on the content but on the process itself - the interaction between the players. The point is to bring about changes in behaviour or attitudes rather than merely to transmit knowledge.

The example given for this type of training also had to do with apparel but in this case it dealt with the management and organisation of garment alterations. It began with some meetings, first informally with certain people, and was then extended to supervisors on the apparel floors. The result was a working group called the *Alterations Project*. In the first phase, the group drew up a single apparel-related document for the whole store. The group has been meeting once a month, always keeping minutes. It consists of a technical body (hierarchy and duties directly related to the problems and solutions), the group of the teams involved, which are operational, and the training department as coordinator and moderator. Later, it was found that there were other problems that needed solving. So there was a second round to establish an *Alterations Team* which would be responsible on each floor for enforcing the rules drawn up by the group. It had become clear that training needs to be done at team and group level and involve work situations.

For the assessment, questionnaires were given to supervisors and participants and data was gathered comparing incidents and complaints before and after the *training by project*.

### **Analysis and discussion of results**

After the action training model had been implemented, supervisors and others (trainers, suppliers, training officers) found that the knowledge of almost all the sales assistants had improved, that this type of train-





<b>Results in the four levels of evaluation (Kirkpatrick's model)</b>				
<b>Type of training</b>	<b>1. Reaction to training</b>	<b>2. Learning</b>	<b>3. Transfer</b>	<b>4. Results in the company</b>
Work-context training in apparel	100 % of the sales assistants considered the exercises useful and 78 % very useful, because they were related to their work. They preferred on-the-job training.	98 % of the sales assistants said that they learned more. For the supervisors, there were improvements in all performance parameters in at least 60 % sales staff.	In the supervisors' opinion, 95 % of the sales assistants applied the things they learned in the training. For the trainer, all improved in all assessment parameters. The sales staff's performance went up 2 to 3 points on a scale of 1 to 10.	More people trained in less time without leaving their work stations.
Technical product training in simulations	When asked orally after the training, their reactions were generally highly positive. Opinion 2-3 weeks after training, 59 % suggest more practical training, 38 % lasting longer and 19 % with later support in the store.	The supervisors said that the knowledge of 95 % of the sales assistants improved and 98 % of the participants said that they learned things that they could use in their work.	For the supervisors, the sales ability of 60 % of the sales assistants improved, multitasking improved in 30 % and versatility in 22 %. 77 % improved their arguments. Average performance before was 5.6 and after was 7.9.	Where results were concerned, no increase in sales was recorded due to the difficulty in isolating variables and contamination by other factors (fairs, campaigns and promotions).
Training by project - "Alterations"	No questions asked about it but there was 100 % attendance at the monthly meetings where representatives of each floor were present.	58 % of the sales staff and 67 % of the despatch operators said that they learnt something.	100 % of the despatch operators began to respect standards, 40 % of the supervisors learnt about the circuits and over 60 % improved their relationship with an outside workshop, supplier.	Incidents in the store with or without the presence of the customer reduced from 5.1 % (at the end of the 1st month of the project) to 1.1 % (4 months later).

ing had a practical application, that the knowledge acquired was used on the job and that - in the opinion of all the sales assistants assessed by the supervisors in simulations or in their jobs - their performance had improved.

The results were different for each of the types of training identified and the training course given because the problems and goals were also different. Not only the form of training, but also the strategies and activities differed in each case. Nevertheless, in all of them we followed a model based on a cyclical process, close to the action research method. In addition, all of them assume that the training meeting itself is a moment for reflection on the training. Therefore, before each training session, there is a need for preparation and reflection, which must also continue after the training. So here we have a new role in the organisation for the training department and its practitioners. They must first ensure that everyone participates, that the trainees and work practices are the focal point of the training, and that the others become reflective professionals. The training department instils curiosity, generates research and creates knowledge as a way of reaching a more abstract knowledge.

Evaluating the results in the light of Kirkpatrick's four levels (1998), we obtain the data shown in the above table. The result of this training method was that training situations were integrated with work. This was what we wanted to happen in order to achieve some changes in work practices.

Another aspect that distinguishes this project from the company's previous course-based training model was that there were fewer training sessions. In training by project, we work on actual work practices and training and work are fully integrated. With on-the-job training, transfer and monitoring is immediate; there is no need to take people away from their jobs for training. Less time is needed for classroom simulations, while reflection before and after training prepares and continues the learning process.

It is therefore a model that aims at rationalising training times, with no time wasted on useless information (usually included in programmes just to fill the schedule defined or imposed at the beginning). This model is effective, produces results for work and for the organisation and reduces training times, making it more efficient. The form and context of the training obviously have to be adjusted to existing conditions and needs.

This project seems to have made an impact, albeit limited, outside the company, i.e. regarding suppliers and their own training staff. This way of applying training was new to many of them, and opened up a new way of understanding training. For those who had never offered training, this new way was appealing, helpful and attractive. For the old hands, it at least showed them that there were other ways of organising training. From courses that were all defined from the start and structured on the basis of the product itself or the way the trainer organised the information, we moved on nec-



essarily to tailor-made training. Thus the training path followed corresponded to the needs and interests of the training's customer system (Lopes, 2002), with the trainee as the focal point.

Often, the training department was the first to get suppliers, supervisors, sales assistants and the department store together. Generally we found that the suppliers saw themselves as partners. After the training was completed they often came to tell me about the changes they had noticed in the sales assistants' performance .

### **Reflection about the study**

#### **Difficulties and resistance**

The first difficulty encountered was the actual design of the action research as a training strategy, given the shortage of studies on the subject.

Getting people to behave as thinking practitioners and to be responsible for their own training, so that the training does not become a transmissive exercise, was extremely difficult. Neither was it easy to involve the different partners, who are not usually called upon to get involved in training. Another problem is that transmissive training and school training is deeply rooted in tradition. The attitude of many trainers when teaching is one of lecturing; they uncritically accept the idea that their job is to 'teach' and 'train' others, whose job is respectively to learn.

When trainers are suggested by suppliers or even by brand promoters, it is also necessary to define how they should be selected. Should we choose specialists who are familiar with the production and manufacture of the products or should we prefer practised sales assistants who know from experience what questions customers ask and are closer to the work culture of the sales assistants being trained?

Another difficulty was the fact that there were several parties involved throughout a process that took place during work time. Often, only with persistence did we get the supplier trainers to collaborate. Buyers, too, were not always available to collaborate in the joint advance activities needed to prepare the training.

Where the targets of the training were concerned, it was important to confront them (as suppliers, buyers, supervisors or sales assistants) with a preliminary analysis of the results of training. Their response may help understand whether the original idea is correct. But we cannot rely completely on the targets, as they tend to see things in their own way and this may hinder their ability to stand back and analyse the situation.

In evaluating, it is essential to recognise how difficult it is to obtain internal results and indicators. This is why in classroom training we use self-evaluation or evaluation by others that is based only on people's perception of actions. We were not able to conduct evaluations as often as we would have liked. The more short training sessions are offered, the more difficult it is to evaluate them systematically. We also have to take into account that the sales assistants are asked to assess their knowledge in a questionnaire they fill in before each act of training. The supervisors are asked for their cooperation before and after training, in the identification and assessment phase. It would be unthinkable, in the two or three weeks after simulations, to ask everyone for an evaluation of all the training. As some of the training processes would overlap, we would even run the risk of getting the wrong evaluation.

#### **Some limitations**

The limitations of this study had to do mainly with methods and results. Where methods were concerned, the study was not representative of all ways of organising training and may not be adaptable to all companies. We are not claiming, therefore, that the results and conclusions can be generalised, given the diversity of situations and circumstances.

A considerable limitation was the fact that the people who conduct the evaluation are judges and parties at the same time. The evaluators (supervisors or trainers) may run the risk of unintentionally ignoring or minimising negative aspects in which their responsibility is involved. It also impossible for them not to be influenced by their own experience and the relationship they have with the people they are evaluating. The internal evaluation may therefore not be enough to assess the results and the functioning of a training session or system.



An external evaluation would have been useful and appropriate and should have been used to complement the internal one and to help make a final appraisal of the effects of training. The trainees' skills should have been tested, and this was not done for the simulations. It is easier for an external evaluator to be objective and analyse things at a distance while contributing his or her own point of view. We decided at the outset that no outside assessment would be made, either from customers or suppliers. It would certainly have been interesting, but it was not feasible at the current stage of the process.

The results of research must obviously be independent from the researcher but the truth is that we do not know the impact that personal presence and influence had on the field work and results. There may also have been a lack of detachment, distance and critical reflection because the practitioner and researcher were the same person.

### **Impact of the study on the organisation**

It is important to reflect on events that would not have occurred if the previous situation had continued. Without the action training programme, we would have followed the model imported from the parent company, which is the same as that imposed by the bodies that regulate funded training, or even the training model used by most companies. What they all have in common is that training is designed on the basis of contents or modules structured into a more or less compulsory timetable, and that courses are offered by catalogue.

One of the difficulties was the inability to compare with the previous situation, due to a lack of data on the impact of training on sales or on the organisation. What we can say is that should the previous situation have continued - with no planned methods and without taking the stakeholders into account, merely scheduling courses in response to a request from one of them - the changes achieved would not have occurred. We feel that the main change is the ability to achieve changes in the future. This study showed that it is possible to do things differently from the way currently in use or normally imposed by what we could call supply.

The *simulation training* was given without any prior preparation with the suppliers, store or buyers. The suppliers would simply offer to come and give training about their products, and this was accepted. On the other hand, the training department was expected to organise a considerable number of training sessions. Often participants found that they were already familiar with the product or that they had learnt nothing new - even that they did not offer this product in their sales area. If this had continued, sales assistants and supervisors would have ended up believing that there was no point in engaging in training.

The problem is that usually suppliers are not used to offering training, or else their courses are already structured - normally in the form of PowerPoint presentations. With the action training project, training is tailor-made to meet specific needs. Now everyone knows what to expect and everyone plays an active part in planning. In view of the context and the target population (sales assistants who are often already familiar with the product), not that many of the presentations are of interest.

Training is now organised and designed to respond to real problems and to improve sales assistants' skills. Classroom time aims to consolidate knowledge and to work on practical situations arising in the store. It is important to identify the problems involving products and services as a whole, i.e. not only the technical characteristics of the product but also sales arguments and the services the company provides. The communication established is thus more important than the information transmitted. Otherwise we could expect supervisors and sales assistants who were unavailable or uninterested in the training to be unwilling to take it. Now that the project has been implemented, we have noticed that the word and concept of *training* are widely used by all who have participated in it, guaranteeing greater efficiency. As a result, the training department's role and image in the organisation have improved.

There are also differences with the other forms of training introduced during the project, *training in a work context* and training by project. Without these it would be difficult to train all new sales assistants, possessing different degrees of knowledge, who gradually join the organisation. It would al-



so be difficult to arrange shifts for part-time employees, allowing them to participate in classroom training. Today in the apparel departments, training is taken to the new recruits and helps with their integration and development. What is needed now is to extend the same method to other sales areas. For this, we must be able to count on the supervisors, who are a central element of the *customer system* of training. It is not feasible for the training department to have trainers in each area of knowledge. This type of training would have to involve supervisors and other specialists as training agents in their own work areas (qualifying them as tutors by giving them training as trainers).

*Training by project* was another form of training introduced. It involves setting up heterogeneous groups that work on wide-ranging problems. The idea is that participation in the projects and the creation of work dynamics and methods in themselves serve a didactic purpose. If the alterations working group had not been set up, incidents would have continued to increase and each area would have tended to solve problems in its own way and by its own criteria. By creating this group, we were able to begin standardising criteria and solving problems on a continuous basis in the apparel and despatch sections. Monthly meetings can detect and address new problems, which are often solved within new sub-groups. Before, needs were identified sporadically. Today, there is no single moment for detecting training needs. The new system makes it possible to identify and solve problems at any time. At these meetings, the idea is not just to say 'we need some training' or to think that training will solve high spending on alterations. Supervisors, operators, sales assistants and the Training Department are all involved in identifying causes of and solutions for problems using a method similar to work systems auditing. This goes against the existing trend, in which a supervisor leaves it to training to change a sales assistant's practices and gives up any responsibility for changing the way she works. We also try to reverse the tendency of supervisors to avoid responsibility for the training they should be offering in their areas. Each training facet should be incorporated in the organisation of work itself, giving the organisation the disciplines it needs to become a learning organisation (Senge, 1990).

Traditionally, neither the Training Department nor the trainers are held accountable. After giving the training, they often feel that their job is done and they then wash their hands of any problems that may arise. With this project, rather than just organising training and summoning people to take it, the training department is involved in the process, acting as a partner with the working groups. From the preparation to the monitoring and quantitative assessment, the company's training department is working side by side with the teams in a constant, cyclical process of assessing, planning, observing and reflecting on the training.

### **Future research**

We suggest that other forms of training should be studied in the context of the organisation of training in sales and distribution companies. It would be interesting to analyse how certain ways of working create a professional identity and help build knowledge and skills, not so much through training, but through the organisation of work itself. An analysis could be made of how work itself often generates more qualifications than training does. The idea of on-the-job learning confirms the contribution made by work to the development of thought, to forms of representation, and to knowledge, attitudes and skills.

Another interesting approach in this line of research would be to investigate the new role of human resource managers, who should recognise the importance of employees' acquiring the capacities and skills to become reflecting practitioners. Possible ways of working could be analysed with supervisors, helping them to identify the changes needed and ways of implementing work processes, coordinating human resources and integrating people and management practices. It would mean analysing people not only as resources with abilities, talents or the necessary knowledge for doing a job, but also for their personalities, attitudes, motivations and personal goals.

On the basis of the proposed model, training should be seen as a service *sui generis* of the company that designs it and transforms it into a series of resources. Training must become part of the work process; in this way, fewer and fewer training courses will actually be necessary. It will also be gratifying to workers to feel they work in a place



where their knowledge and experience are appreciated and used and where their personal and vocational interests, their life projects and career plans, converge. This idea is in line with the trend in today's post-bureaucratic organisations, which value both

the personal and professional lives of their staff and take into account the needs and wishes of those involved in the creation of wealth. In this way, organisations can achieve the sustainability they need.

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## Key words

Training evaluation, training innovation, adult training, continued training, training development, training research.

This section has been prepared by **Anne Waniart**, and the Documentation Service with the help of the members of the European network of reference and expertise (*ReferNet*).



**This section lists the most important and recent publications on developments in training and qualifications at an international and European level. Giving preference to comparative works, it also lists national studies carried out as part of international and European programmes, analyses of the impact of Community action on the Member States and national studies seen from an external perspective.**

## Europe International

### Information, comparative studies

#### **International Council for Educational Media (ICEM)**

[S.l.]: ICEM-CIME, 2004-

ICEM is a non-profit, non-governmental organisation which has been active in the field of educational technology since 1950. Its seat and treasury are maintained in one or more of the member countries. It maintains operational relations with Unesco and is an NGO affiliate. ICEM's objectives: 1. to provide a channel for the international exchange and evaluation of information, experience and materials in the field of educational media as it applies to pre-school, primary and secondary education, technical, vocational, industrial and commercial training, teacher training, continuing and distance education. 2. to cooperate in the development and application of educational technology with other international organisations involved in practice, research, production, and distribution of educational materials.

Last visit to page: 12/2004

[www.icem-cime.com/](http://www.icem-cime.com/)

#### **Social competences in vocational and continuing education / Antony Lidgren and Anja Heikkinen (eds.)**

Bern: Peter Lang, 2004, 256 p.

(Studies in vocational and continuing education; 1)

ISBN 3-03910-345-8; ISSN 1660-3443

Social competences have played a crucial role in the international search for generic, over-arching skills, key qualifications and core competences since the 1970s. By the end of 1990, social cohesion and integration had gained new momentum in this discourse because of their importance for the functioning of global market economy and industries. Moreover, the concept of social capital affects and changes the role of social competences in vocational and continuing education. This volume presents a collection of papers which reflect and describe these changes and their political, economical and pedagogical backgrounds and implications. The topics include economisation of social competences, social competences as key qualifications for employability and entrepreneurship, social challenges in eroding welfare societies, gender and social competences, and the ideological and economical context of the social competences discourse.

#### **Workplace learning in context / edited by Helen Rainbird, Anne Munro, Alison Fuller**

London: Routledge, 2004, 336 p.

Combines a critical analysis of the organisational and employment context of workplace learning with an understanding of theories of learning. It brings new ideas and an understanding of the social context of the workplace.

## European Union: policies, programmes, participants

#### **Commission Staff working paper. Progress towards the common objectives in education and training: indicators and benchmarks.**

In: SEC (2004) 73 (2004)

Luxembourg: EUR-OP, 2004 - 113 p.

This report is a contribution to the preparation of the first joint Communication of the Commission and the Council (Education) to the European Council in 2004, reporting on

progress made in improving European education and training. It includes an analysis of 29 indicators identified and endorsed by the Standing Group on Indicators and Benchmarks. This is a first attempt at establishing a statistical framework for measuring progress towards the common objectives. The report analyses performance and progress of education and training systems using 29 indicators and covering 30 European countries. Some of those are: teach-



ing profession, performance in reading literacy, completion of upper secondary education, graduates in science and technology, lifelong learning, early school leavers, foreign languages learning, and mobility of students/trainees.

[http://libserver.cedefop.eu.int/vetelib/eu/leg/eurodoc/2004/sec\\_2004\\_0073\\_en.pdf](http://libserver.cedefop.eu.int/vetelib/eu/leg/eurodoc/2004/sec_2004_0073_en.pdf)

**Democratic high quality of learning and research: internationalisation and awareness for a global governance culture / Bombardelli, Olga**

ECSCA World Conference. Brussels. 2004

Brussels: ESCA, 2004, 8 p.

*European Community Studies Association, ESCA, ldf@icp-ajm.org, www.ecsanet.org*

This paper focuses on the educational task of the university and deals with the following questions: 1. role and mission of the University, 2. concepts of globalisation / localisation and university internationalisation, 3. a 'vision' for a European Higher Education system and practical proposals.

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[http://libserver.cedefop.eu.int/vetelib/euorg/ECSCA\\_2004\\_0001\\_en.doc](http://libserver.cedefop.eu.int/vetelib/euorg/ECSCA_2004_0001_en.doc)

**ERA-MORE: the European network of mobility centres / European Commission**

Brussels: European Commission, 2004

The European Network of Mobility Centres provides free access to information, and customised assistance to researchers who wish to move around Europe. The centres will also assist them in all matters relating to their professional and daily lives, including practical information on housing, schooling, day-care or language courses.

Last visit to page: 12/2004

[http://europa.eu.int/eracareers/index\\_en.cfm?11=4](http://europa.eu.int/eracareers/index_en.cfm?11=4)

**Erasmus Mundus: list of Masters courses selected 2004 / European Commission. Directorate General for Education and Culture**

Brussels: European Commission, 2004 -

This site provides links to the List of Masters courses selected under Action 1 - within Erasmus Mundus 2004. They are divided into: 1) Masters courses without a preparatory year, and 2) Masters courses with a preparatory year.

Last visit to page: 12/2004

[http://europa.eu.int/comm/education/programmes/mundus/projects\\_en.html](http://europa.eu.int/comm/education/programmes/mundus/projects_en.html)

**European profile for language teacher education: a frame of reference: study / by Michael Kelly, Michael Grenfell et al.**

European Commission, Directorate General for Education and Culture;

Brussels: European Commission, 2004, 4 p.

"This ground-breaking European study analyses the essential components of language teacher education in twenty-first century Europe. Conceived as a frame of reference for policy makers and language teacher educators, the European Profile should become an essential checklist for all who are involved in language teacher training and education. Based upon in-depth research from across the European Union, and drawing on the advice of experts in the field and numerous case studies, the report offers examples of good practice together with practical guidance for implementation."

[http://libserver.cedefop.eu.int/vetelib/eu/pub/commission/dgeac/2004\\_0013\\_en.pdf](http://libserver.cedefop.eu.int/vetelib/eu/pub/commission/dgeac/2004_0013_en.pdf)

**Integrating immigrant children into schools in Europe.**

Brussels: Eurydice, 2004, 100 p.

ISBN 2-87116-376-6 (en)

The present survey describes the situation in 2003/04 at the pre-primary, primary and compulsory general secondary levels of education in 30 countries in the Eurydice Network. In order to place the study in context, demographic data concerned with immigration and the relative size of the foreign population is included, together with a review of European legislation regarding the education of immigrant children. The study then considers the entitlements of these children under national legislation and the way they are integrated into the education system of their host country (reception and guidance, integration in mainstream or separate classes, school support measures, teaching of their mother tongue, and changes in school routine to meet their particular cultural requirements).

[http://libserver.cedefop.eu.int/vetelib/eu/pub/eurydice/2004\\_0003\\_en.pdf](http://libserver.cedefop.eu.int/vetelib/eu/pub/eurydice/2004_0003_en.pdf)



### **Joint assessments of employment policy in the candidate countries.**

Brussels: European Commission, 2004-

Analysing the employment situation and labour market policies in the candidate countries, the impact of accession on employment and labour markets in the EU, and data & statistics on key issues and developments. The JAPs present a joint analysis by each candidate country and the Commission of the key challenges in labour market reform and for employment policies. They focus on the need to promote and manage rapid structural change in order to establish flexible and adaptable labour markets, which are appropriate for a dynamic market economy as part of the Single Market. The need for the right incentives for taking up and creating jobs, for investing in human resources and for promoting activation and prevention is furthermore underlined. The implementation of the JAP commitments is also jointly monitored by the Commission and each candidate country.

Last visit to page: 12/2004

[http://europa.eu.int/comm/employment\\_social/employment\\_analysis/japs\\_en.htm](http://europa.eu.int/comm/employment_social/employment_analysis/japs_en.htm)

### **Kok report: a social NGO's review of the Lisbon strategy adopted by the members of the Social Platform on 20 October 2004.**

The Platform of European Social NGOs; Brussels: Social Platform, 2004. - 4 p.

The report of the Kok Group on the Lisbon Strategy clearly recognises that much more is to be done if the Lisbon targets are to be achieved by 2010. The Kok report should be seen as one of a number of contributions towards the mid-term review of the Lisbon Strategy. It is important that there is an open debate involving all stakeholders in advance of the Spring Summit in 2005. The Kok report does talk about the need to involve civil society. However, this is not translated into the recommendations of the report, which speaks only of consultation with the social partners.

[http://libserver.cedefop.eu.int/vetelib/euorg/SocialPlatform\\_2004\\_0001\\_en.pdf](http://libserver.cedefop.eu.int/vetelib/euorg/SocialPlatform_2004_0001_en.pdf)

### **Leonardo da Vinci national agency valorisation activities.**

Brussels: European Commission, 2004, 10 p.

"Valorisation can be described as a process of exploiting project learning and outcomes

(training products and processes, methodology, course materials etc) with a view to optimising their value and impact in existing and new contexts (target groups, companies, sectors, training institutions and systems etc)." The future activities for valorisation of Leonardo in National Agencies, are set out in this document.

[http://libserver.cedefop.eu.int/vetelib/eu/pub/commission/dgeac/2004\\_0006\\_en.pdf](http://libserver.cedefop.eu.int/vetelib/eu/pub/commission/dgeac/2004_0006_en.pdf)

### **Online Educa Berlin 2003: post conference report.**

Berlin: ICWE, 2004, 6 p.

The topic of quality was particularly popular as the e-learning sector continues to grapple with the challenge of widening the appeal and reach of e-learning to mass audiences while still maintaining quality control in an increasingly complex environment. The reach of e-learning was also very much in evidence. Barriers to take up e-learning within companies were also addressed. The effective introduction of e-learning in universities and colleges is increasingly related to the question of change management within higher education.

[www.online-educa.com/pdf/post\\_conference\\_report\\_2003.pdf](http://www.online-educa.com/pdf/post_conference_report_2003.pdf)

### **Report on the implementation of the Commission's action plan for skills and mobility COM (2002) 72 final: communication from the Commission to the Council, the European Parliament, the Economic and Social Committee and the Committee of the Regions.**

Luxembourg: EUR-OP, 2004, 47 p. - (Documents COM; (2004) 66)

The Commission's Action Plan for Skills and Mobility of February 2002 had the objective of helping to create a favourable environment for more open and easily accessible European labour markets by 2005. The present Communication on European Employment Mobility provides a policy context, describing the challenges regarding skills and mobility affecting the acceding countries, and the down-beat economic environment over the past couple of years which has imposed its own constraints on developing more mobility between jobs and between countries. The main purposes of this Communication are to: a) describe the progress made in implementing specific elements on the Action Plan; b) analyse the contribution made to the European Employment Strate-





gy and the Education and Training 2010 programme; and c) identify areas where progress has been made, and where further action could be beneficial.

[http://libserver.cedefop.eu.int/vetelib/eu/leg/eurodoc/2004/com\\_2004\\_0066\\_en.pdf](http://libserver.cedefop.eu.int/vetelib/eu/leg/eurodoc/2004/com_2004_0066_en.pdf)

### **Similarities and differences in accreditation: looking for a common framework**

/ Tom Vroeijenstijn.

The Hague: ECA, 2003, 123 p.

Mark Frederiks ECA Coordinator

NVAO i.o. P.O. Box 556 2501 CN

The Hague The Netherlands,

Tel.: (31-070) 312 2352, Fax: (31-070)

312 2301,

E-mail: [m.frederiks@nvaov.nl](mailto:m.frederiks@nvaov.nl)

“Document prepared for the workshop on the establishment of a European Consortium for Accreditation (ECA), The Hague 12/13 June 2003. This synopsis is meant to provide background information for the international workshop of 12 and 13 June 2003, organised on the initiative of the NAO. The aim of the meeting is to discuss the possibility of establishing a European Consortium

for Accreditation (ECA). To reach this aim, it is important to obtain a better knowledge of the systems in other countries.”

[http://libserver.cedefop.eu.int/vetelib/euorg/ECA\\_2004\\_001\\_en.pdf](http://libserver.cedefop.eu.int/vetelib/euorg/ECA_2004_001_en.pdf)

### **Sharper employment recommendations.**

European Commission, Directorate General for Employment and Social Affairs

Luxembourg: EUR-OP, 2004

In: Social agenda 9 (2004),

Drafted by the European Commission, the recommendations are based on priorities and concerns presented in the Joint Employment Report 2003-200. They highlight the importance of supporting and promoting change in the labour market and making increased public and private investment in human capital through the involvement of all productivity, full employment and greater social cohesion and inclusion. Emphasis is placed on adaptability, attracting more people to the labour market, investing in human capital and better governance.

[http://europa.eu.int/comm/employment\\_social/social\\_agenda/soag9\\_art4\\_en.pdf](http://europa.eu.int/comm/employment_social/social_agenda/soag9_art4_en.pdf)

## From the Member States

### **AT Verein Ananas: Lern(anregungen) zwischen Krisenintervention, Sozialarbeit und Erwachsenenbildung. Versuch einer kritischen Darstellung / Malek, Kerstin**

[The Verein Ananas association: learning (suggestions) between crisis intervention, social work and adult learning: an attempt towards a critical presentation.]

Vienna: Universität Wien, 2004, 275 p.

Landesverteidigungsakademie Wien,

Amtsgebäude Stiftgasse,

Stiftgasse 2a, A-1070 Wien, Tel.: (43-1) 52000,

URL: [www.bmlv.gv.at](http://www.bmlv.gv.at)

Participation in adult education normally takes place on a voluntary basis. However, the organisation “Ananas” works with parents who have been compelled to seek its help by social services who feel the parents are incapable of providing adequately for their children. This paper examines the following question: under what conditions would these parents be self-motivated to take the courses offered by the organisation “Ananas” and other additional adult education courses?

es? This paper will try to show that specific didactic elements of adult education have to be taken into account in order to create the necessary motivation for these parents and induce them to make the effort to learn.

### **BG Inovacii v tehnologiata na obuchenie pri profesionalnata podgotovka / Tasheva, Stanka.**

[Innovation in the technology of vocational education]

Sofia: National Institute for Education, 2000, 207 p.

National Institute of Education, [director@nie.bg](mailto:director@nie.bg), [www.nie.bg](http://www.nie.bg)

The book introduces the research and creative experience for innovation in training technology. On the basis of the general didactic theory, as well as the school experience, adequate forms and methods are designed and renovated, in accordance with the specific features of vocational education and training. The authors analyse consecutively: binary lesson, problem seminar, socio-psychological training, practical les-



son on the method of the projects. The readers attention is called to: case incident, brainstorm, discussion, role-playing, etc. The possibilities of the electronic dialogue as well as the strategies for using Internet in education are presented. The book includes concrete methods that are based on innovation models of teaching in different disciplines.

**CZ** **Odsouzení k manuální práci: vzdělanostní reprodukce v dělnické rodině / Katřnak, Tomas**  
**[Condemned to manual work: educational reproduction in blue collar families.]**

Prague: Prag: Sociologické nakladatelství, 2004, 190 p. (Studie, 39)

This work by a young sociologist is underpinned by theoretical Czech and foreign literature. The author examines to what extent family background influences the level of education a child is likely to achieve, focusing on children from workers' families and their attitudes towards education. This work reveals workers' families ways of life, standards of living, priorities and values where education is low. According to the author, family background is the main reason why children from families of blue-collar workers mostly prefer not to stay in the education system beyond initial vocational training.

**DE** **AusbildungsPlus: mehr Qualifikation für Azubis / Institut der Deutschen Wirtschaft IW.**  
**[AusbildungsPlus: better qualifications for trainees]**

Cologne: IW, 2004

Institut der deutschen Wirtschaft,

G.-Heinemann-Ufer 84-88,

D-50968 Köln,

Tel.: (49-221) 49811, Fax: (49-221) 4981592,

E-mail: welcome@iwkoeln.de,

URL: www.iwkoeln.de

A project of the Institute of German Business and Industry (Institut der Deutschen Wirtschaft, IW) in Cologne, AusbildungsPlus is a free online information service. It provides a nation-wide overview of training opportunities, including continuing education certificates ('Zusatzqualifikationen'), dual system courses of study and comprehensive information on all areas of vocational education and training. This online resource also features up-to-date event information, a newsletter, trainer profiles and a forum for

education experts. It is addressed to trainees and youths as well as experts in the areas of teaching, research and policy, education providers and companies.

Last visit to page: 12/2004

[www.ausbildung-plus.de](http://www.ausbildung-plus.de)

**DK** **Fremtidens uddannelser: den ny faglighed og dens forudsætninger / Henrik Busch, et al.**

**[Education of the future: the new professionalism and its prerequisites.]**

Copenhagen: UVM, 2004

Undervisningsministeriets forlag,

Strandgade 100 D,

DK-1401 Copenhagen K

This publication contains a short analysis and a number of concrete recommendations for educational political initiatives with the aim of ensuring professionalism and its prerequisites in the entire educational system. The authors primarily base their analyses and recommendations on reports from the four working groups appointed by the National Education Authority. In the period 2001-2003, the working groups worked to describe the prerequisites for the new professionalism in the education sector of the future. The working groups focused especially on four teaching subjects: mathematics, Danish, foreign languages and natural sciences.

**EE** **Elukestva õppe strateegia**  
**[Strategy on lifelong learning.]**

Tartu: Haridus- ja Teadusministeerium, 2002, 38 p.

Haridus- ja Teadusministeerium Munga 18, Tartu, 50088,

hm@hm.ee, www.hm.ee/

The objective of the strategy is to create prerequisites for developing a system making lifelong learning possible, also expedience, effective and intensive performing on different levels of social regulation. The prerequisite for widening the access to lifelong learning is the co-operation between public, private and the third sector; between formal, non-formal and informal sector; also between general and vocational education.

Last visit to page: 12/2004

[www.andras.ee/htdocs/gfx/docs/Elukestva\\_Oppe\\_%20Strateegia\(vol1\).pdf](http://www.andras.ee/htdocs/gfx/docs/Elukestva_Oppe_%20Strateegia(vol1).pdf)



## **ES** Central Lechera Asturiana: la formación en un modelo mixto de gestión / María Teresa Sáenz.

**[Central Lechera Asturiana: training in a mixed management model]**

In: Capital Humano, N° 178, June 2004

Madrid: Cisspraxis, 2004

This article presents a training policy based on a mixed model for industrial and company management that fills the gap between employees' actual professional skills and the skills required for specific posts. It focuses on the framework of reference on which this policy is based, on skill-based training, on the type of vocational training action taking place, on the effectiveness of the training programme, and on a specific training model for company managers.

## **FI** Ulkomailta suoritettujen tutkin-tojen tunnustaminen Suomessa **[Recognition of foreign qualifications in Finland]**

Helsinki: Opetushallitus, 2004, 46 p.

Opetushallitus, akaniemenkatu 2,  
00530 Helsinki,

Sukunimi@oph.fi, www.oph.fi

The purpose of this booklet is to provide information on the recognition of foreign qualifications in Finland. The main focus is to provide information on the National Board of Education's (NBE) tasks as the authority deciding on the eligibility that foreign qualifications confer for civil service posts and positions in Finland, and on the NBE's tasks as an information centre on the recognition of qualifications. In general, the recognition of a foreign qualification involves the recognition of the competence and eligibility provided by the qualification. In Finland, the recognition of a qualification may involve the NBE's decision of recognition, a decision made by another Finnish authority on the right to practise a certain profession, or a decision made by a Finnish higher education institution on the eligibility a foreign qualification gives for further studies or on the recognition of foreign studies as part of a Finnish qualification.

[www.oph.fi/info/recognition](http://www.oph.fi/info/recognition)

## **FR** Le choc démographique, défi pour les professions, les branches et les territoires / Commissariat général du plan; Président: Michel Amar; rapporteurs Christine Afriat Jean-Marc Grand [et al.].

## **[The demographic shock, challenge for the professions, branches and territories]**

Paris: La Documentation Française, 2004, 187 p.

(Qualifications et prospective)

The demographic shock expected in the next ten years will have repercussions on the French labour market, given the goals set by the European Union to raise the employment of the 55-64 age-group, the way the more or less acute shortage of skilled workers is affecting some economic sectors in our country, public/private competition, and the differences between regions.

## **IE** Participation of the employed in education and training 2003 / Roger Fox.

Dublin: FÁS, 2004, 275 p.

FÁS, P.O. Box 456, 27-33 Upper Baggot Street, IRL-Dublin,

[minfo@fas.ie](mailto:minfo@fas.ie), [www.fas.ie](http://www.fas.ie)

This article draws on special analyses of the Quarterly National Household Survey 2002 to provide data on the extent and distribution of education/training among employed persons in Ireland. It finds that there has been a very positive increase over the last decade. However, it also notes that significant differences persist in rates of participation among different types of employee (e.g. by age, gender, educational level). The report finds that female participation in education and training (ET) was much higher than male, and that younger age groups were more likely to receive ET than older persons. Participation rates of self-employed/other were significantly lower than those of employees. This was particularly the case for males. Overall the biggest types of training were instruction in a working environment (39 %) and instruction in a classroom setting (35 %). In general the rate of participation in ET was much higher in the (mainly white-collar) private services sector, such as financial and business services, and the public services, such as public administration/defence, education and health (all over 10 %). Manufacturing had a below-average rate of 7.1 %, while construction, wholesale/retail and hotels/restaurants all had low rates of 4 %. Professionals and associate professionals were the most likely occupational group to undergo ET (15 %). Manual workers had a low participation rate at around 4.5 %. The author concludes that the Irish participation rate



of 8.3 % in ET comes in the lower middle rank of OECD countries.

**IS** **Ársskýrsla 2003: Bafmælisrit. Samtök iðnaðarins**  
**[Annual report 2003: anniversary publication.]**

Reykjavík: Samtök iðnaðarins, [2004], 59 p.  
 Samtök iðnaðarins, Borgartúni 35,  
 IS-105 Reykjavík,  
 mottaka@si.is, www.si.is

The annual report of the Federation of Icelandic Industries is also the ten year anniversary publication this year. It contains anniversary articles and the annual overview of the Federation's service, communication, information and safety network for industrial companies. A special chapter covers education and training in the industrial sector of Iceland. The Federation helps plan vocational and technical education along with educational authorities and various organisations. It has a representative on the board of the educational organisations of industry, which have for a number of years organised continuing education for tradesmen and managers.

**IT** **I patti sociali e le esperienze della concertazione locale per lo sviluppo e l'occupazione nelle regioni italiane / Consiglio Nazionale dell'Economia e del Lavoro.**

**[Social agreements and past experiences geared towards the development and employment in the Italian Regions]**

Rome: CNEL, 2004

Consiglio Nazionale dell'Economia e del Lavoro, Viale David Lubin 2, I-00196 Roma, www.cnel.it/

The text analyses negotiation models and social partnerships in relation to the evolution of regional development policies in the last 10 years. This evaluation aims to present a premise to improve the efficacy and efficiency of local policies, by monitoring various regional realities through the interaction between social parties and institutions, and thus aiming to develop employment and income policies.

**LT** **Profesijos mokytoju strateginiu kompetenciju nustatymo ir ju kvalifikacijos tobulinimo modulių rengimo metodika / Rimantas Lauzackas, Vincencas Dienys**  
**[Methodology for the identification of**

**strategic competences of vocational teachers and creation of modules for qualification development]**

Vilnius, Akritas, 2004

AKRITAS, UAB.

Pylimo g. 5/2, Vilnius 01117,  
 ss@info.lt

This publication was prepared in the framework of the Phare 2001 project 'Strategic competences for teachers of construction professions: modelling experience'. The publication is addressed to persons responsible for the organisation or implementation of qualification development for vocational teachers. The publication covers such topics as qualification of vocational teachers and its upgrading, strategic competences of vocational teachers and their identification, design of content for qualification development, description of qualification development modules.

**LV** **Kritiska domasana ka garants kvalitates veicinšanai RTK / Nipers, Janis**

**[Critical thinking as a guarantee of promotion of quality in RTC]**

Riga: Technical University, 2004

Academic Information Centre, Valnu 2, Riga, Latvia, LV-1050

The objective of the article is to show the importance of philosophical dialogue in the development of critical and creative thinking in the college. The article views the role of critical attitude and philosophy in education, and the role of philosophical dialogue in the consumer's / researcher's cooperation in the 'Auto Transport' study programme, self-assessment, how college can affect the needs of environment, and its threats and opportunities.

**NL** **Brainport: bleven lang leren in het Nederlandse agri-food complex / Thomas Lans, Renate Wesselink, Martin Mulder, Harm Biemans**  
**[Lifelong learning in the Dutch agri-food sector].**

Wageningen: Universiteit Wageningen, 2003, 48 p.

Universiteit Wageningen,

Leerstoel Educatie en Competentie Studies,

Postbus 9101,

NL-6700 HB Wageningen

www.wau.nl

The agri-food cluster is in a state of flux and changes are taking place in rapid succes-



sion. The essence of these changes is set forth here, as are factors that should be taken into consideration if lifelong learning incentives are to interface with the perceptions of entrepreneurs or employees. Subsequently, this document addresses the question of how lifelong learning should be organised. Key educational trends and developments are reviewed and the benefits of lifelong learning examined. Finally, various routes are set out on which lifelong learning can be based.

**NO Kartlegging av realkompetansereformen / Helland, Håvard**  
**[A survey of the Non-Formal Competence Reform.]**

Oslo: NIFU, 2004, 78 p.

NIFU, Hegdehaugsveien 31,  
 N-0352 Oslo, Tel.: (47-22) 595100,  
 Fax: (47-22) 595101,  
 E-mail: nifu@nifu.no, URL: www.nifu.no/

This report was commissioned by the Ministry of Education and Research and presents a short survey of how the educational institutions have adapted to the Non-Formal Competence Reform. The report looks in particular at the development of local rules and regulations and methods for evaluation of the applicants, and at how many non-formal qualification applicants of different institutions and lines of study have had in 2001 and 2002. The demographic characteristics of these applicants and students are also briefly outlined.

**PL Samorządowy model oświaty: koncepcje i realia / Ewa Adamczyk, Janusz Gesicki, Ewa Matczak**  
**[Self-governmental model of education: concepts and realities].**

Warsaw: IBE, 2001, 95 p.

The study presents the research on the establishment of the self-governmental model of education in Poland. It describes theoretical foundations concerning the creation of the self-governmental model of education as well as changes related to legal and organisational conditions of introducing this model in Poland. The study also presents the educational needs of local communities which are the beneficiaries of self-governmental education, and analyses the quality of managerial staff in the field of education.

**PT Perfil das competências do orientador de formação / Francis-**

**co Carvalho, Teresa Ventura e**  
**[Skill profile of the training tutor].**

[S.l.]: [s.n.], 2004 00

Coordenação do Internato Complementar de Clínica Geral da Zona Sul, Lg. Prof. Arnaldo Sampaio, edf. Centro de Saúde de Sete Rios - 4º piso - 1500-498 Lisboa 0014498 520 L

The identification of the characteristics required by a tutor in post-graduate medical training in order to ensure the quality of his or her teaching is needed not only by the trainee but also for the institutions responsible for issuing professional qualifications. The aim is to define the skills profile of a tutor of medical students undergoing training in such a way that it meets the needs of an educational process (specialisation) which mostly takes place within a real work context. This profile identifies the characteristics which the tutor should have and divides them methodologically into three groups: starting conditions, attributes and teaching skills. The skill profile, which is a useful self-assessment instrument, also enables the institutions responsible for the professional qualification of the tutor to review their pedagogical work and thus help to support the technical development of the individual.

**SE Vuxenutbildning i förändring: buppföljning av hur flexibelt lärande introduceras i Sveriges kommuner / Carl Holmberg, Conny Karlsson**  
**[Changing continuing education: a follow-up on how flexible learning is being introduced in Sweden's municipalities.]**

Hässleholm: Nationellt centrum för flexibelt lärande, 2004, 42 p.

Lifelong learning is an important part of Swedish education policy. A flexible education system is required to make it possible for adults to combine work, family, and studies. This report describes the situation regarding flexible education in Swedish municipalities.

[www.cfl.se/pdf/publikationer/vuxenutbildning\\_i\\_forandring.pdf](http://www.cfl.se/pdf/publikationer/vuxenutbildning_i_forandring.pdf)

**SI Izobraževanje z vidika standardnih pravil za izenačevanje možnosti invalidov v Sloveniji Globačnik, Bojana**  
**[Standard rules for equal opportunities for the disabled]**

Ljubljana: Urad Vlade RS za invalide, 2003

The article deals with the education of disabled children and adults in some countries



of Europe and Slovenia. There are some facts mentioned which have an important impact on the quality of education. The process of education and vocational training is successful when it is undertaken in connection with employment. Education and vocational training programmes are effective when flexible and based on the use of new technologies, and when they improve the quality of life of the disabled.

*[http://www.gov.si/uzi/publikacije/izobrazevanje\\_odraslih.doc](http://www.gov.si/uzi/publikacije/izobrazevanje_odraslih.doc)*

**SK** **Current status of vocational education and training in Slovakia: vocational education and training on the verge of the Millennium / by Juraj Vantuch with the support of Dagmar Jelinkova**

Štátny inštitút odborného vzdelávania (ŠIOV), Bellova 54/a, 837 63 Bratislava, siovsiov.sk, www.siov.sk/

The report presents an in-depth description and analysis of the developments in vocational education and training in Slovakia on the verge of the millennium. In the first two chapters the author provides information on the situation of the national economy and the labour market, and the consequences of developments in the period under examination on human resource development and the education system. The following chapters are aimed at description and analysis of trends in initial vocational education and training and continuing vocational training, in particular structure and provision, responsible bodies, financing, involvement of social partners, curricula development, quality and certification, legislation concerning

initial and continuing VET, management training, VET teachers, managers and administrators, and research in VET. The report also provides information on international cooperation and the VET-related community projects in which Slovakia was involved, as well as on the role of the Slovak National Observatory of VET which belongs to the network of national observatories created by the European Training Foundation. In the conclusions the author stresses the need for a new model of financing VET. The annex offers detailed statistical data concerning VET.

*[www.siov.sk/siov/dokhtm/7sno/sno/archiv/vetrep01\\_obal.pdf](http://www.siov.sk/siov/dokhtm/7sno/sno/archiv/vetrep01_obal.pdf)*

**UK** **Pathways in Adult Learning Survey (PALS) 2003 / Dawn Snape, Alice Bell and Abigail Jones.**

Nottingham: Department for Education and Skills, 2004

Some 84 per cent of those who were learning at the time of the national adult learning survey in 2001 engaged in further learning in the two years following the survey. This is one of the findings of the Pathways in adult learning survey (PALS) 2003. PALS is based on an analysis of 1,815 interviews taken from a randomly selected sample of respondents to the national adult learning survey, 2001. This group was asked about their learning experiences in the two years since their last interview. Only 31 per cent of those who were not learning in 2001 undertook some learning in the following two years.

*[www.dfes.gov.uk/research/data/uploadfiles/RR559.pdf](http://www.dfes.gov.uk/research/data/uploadfiles/RR559.pdf)*





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### Cedefop

European Centre for the Development of Vocational Training  
PO Box 22427  
GR-55102 Thessaloniki, Greece  
Tel. (30) 2310 49 00 79  
Fax (30) 2310 49 00 43  
Mr Marc Willem  
Head of Area D - Information, communication and dissemination  
E-mail: mwi@cedefop.eu.int  
Internet: <http://www.cedefop.eu.int>  
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Ms María Luz de la Cuevas Torresano  
E-mail: mluz.cuevas@inem.es  
Internet: <http://www.inem.es>

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Methodological Centre for Vocational Education and Training  
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LT-2600 Vilnius, Lithuania  
Tel. (370-5) 21 23 523  
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Ms Vera Czesana  
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### Ministère de l'Éducation nationale et de la Formation professionnelle

Service de la Formation professionnelle  
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L-2926 Luxembourg  
Luxembourg  
Tel. (352) 47 85 241  
Fax (352) 47 41 16  
ReferNet National Co-ordinator:  
Mr Jos Noesen  
E-mail: noesen@men.lu  
Internet: <http://www.men.lu>

### IQF

Institute for Quality in Training (former INOFOR)  
Avenida Almirante Reis, n.º 72  
P-1150-020 Lisboa  
Portugal  
Tel. (351-21) 81 07 000  
Fax (351-21) 81 07 190  
ReferNet National Co-ordinator:  
Ms Fernanda Ferreira  
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Mr Sven-Erik Povelsen  
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### FÁS

Training and Employment Authority  
P.O. Box 456  
27-33 Upper Baggot Street  
Dublin 4  
Ireland  
Tel. (353-1) 607 05 36  
Fax (353-1) 607 06 34  
ReferNet National Co-ordinator:  
Ms Jean Wrigley  
E-mail: jean.wrigley@fas.ie  
Internet: <http://www.fas.ie>

### OMAI

Oktatási Minisztérium Alapkezelő Igazgatósága  
Ajtsi Durer Sor 19-21  
HU-1146 Budapest  
Hungary  
Tel. (36-1) 30 46 62 391  
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ReferNet National Co-ordinator:  
Mr Tamas Köpeczi-Bocz  
E-mail: kopeczit@omai.hu  
Internet: <http://www.nive.hu>

### CP

Centra RS za poklicno izobraževanje  
Ob Zeleznici 16  
SI-1000 Ljubljana  
Slovenia  
Tel. (386-1) 58 64 216  
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ReferNet National Co-ordinator:  
Ms Mojca Cek  
E-mail: mojca.cek@cpi.si  
Internet: <http://www.cpi.si>

### BIBB

Bundesinstitut für Berufsbildung  
Robert-Schumann-Platz 3  
D-53142 Bonn, Germany  
Tel. (49-228) 107 16 02  
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ReferNet National Co-ordinator:  
Mr Georg Hanf  
E-mail: hanf@bibb.de  
Internet: <http://www.bibb.de>

### ISFOL

Istituto per lo sviluppo della formazione professionale dei lavoratori  
Via Morgagni 33  
I-00161 Roma, Italy  
Tel. (39-06) 44 59 01  
Fax (39-06) 44 29 18 71  
ReferNet National Co-ordinator:  
Mr Colombo Conti  
E-mail: c.conti@isfol.it  
Internet: <http://www.isfol.it>

### Department of Further Studies and Adult Education

Ministeru ta' l-Edukazzjoni Room 325, Education Division  
Great Siege Road, MT-CMR02 Floriana, Malta. Tel. (356-21) 22 81 94  
Fax (356-21) 23 98 42  
ReferNet National Co-ordinator:  
Ms Margaret M Ellul  
E-mail: margaret.m.ellul@gov.mt  
Internet: <http://www.education.gov.mt>

### ŠIOV

State Institute of Vocational Education and Training  
Černyševskeho 27  
SK-85101 Bratislava, Slovakia  
Tel. (421-2) 62 41 06 78  
Fax (421-2) 62 41 06 78  
ReferNet National Co-ordinator:  
Ms Dagmar Jelinkova  
E-mail: sno@netax.sk  
Internet: <http://www.siov.sk>

### INNOVE

Elukestva Õppe Arendamise Sihtasutus  
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EE-10118 Tallinn, Estonia  
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ReferNet National Co-ordinator:  
Ms Evelin Silla  
E-mail: evelin.silla@innove.ee  
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### Human Resource Development Authority of Cyprus

2 Anavissou Street, Strovolos  
P.O. Box 25431  
CY-1392 Nicosia  
Cyprus  
Tel. (357-22) 39 03 63  
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ReferNet National Co-ordinator:  
Mr George Stekkeris  
E-mail: g.stekkeris@hrdauth.org.cy  
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### CINOP

Centrum voor Innovatie van Opleidingen  
Pettelaarpark - Postbus 1585  
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Netherlands  
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ReferNet National Co-ordinator:  
Ms Martine Maes  
E-mail: mmaes@cinop.nl  
Internet: <http://www.cinop.nl>

### OPH

Opetushallitus  
Hakaniemenkatu 2  
P.O. Box 380  
FI-00531 Helsinki  
Finland  
Tel. (358-9) 77 47 71 24  
Fax (358-9) 77 47 78 65 or 69  
ReferNet National Co-ordinator:  
Mr Matti Kyrö  
E-mail: matti.kyro@oph.fi  
Internet: <http://www.oph.fi>





## Associated organisations

### Skolverket - Statens Skolverk

Kungsgatan 53  
S-10620 Stockholm  
Sweden  
Tel. (46-8) 723 32 00  
Fax (46-8) 24 44 20  
ReferNet National Co-ordinator:  
Mr Sten Petterson  
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Internet: <http://www.evta.net>

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Qualifications and Curriculum Authority  
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UK-W1J8QA London  
United Kingdom  
Tel. (44-20) 75 09 55 55  
Fax (44-20) 75 09 66 66  
ReferNet National Co-ordinator:  
Mr Tom Leney  
E-mail: [leneyt@qca.org.uk](mailto:leneyt@qca.org.uk)  
Internet: <http://www.qca.org.uk>

### DG EAC

European Commission  
Directorate-General for Education and  
Culture  
Rue de la Loi 200  
B-1049 Bruxelles  
Belgium  
Tel. (32-2) 299 42 08  
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Internet: <http://europa.eu.int>

### ILO

International Labour Office  
4 Route des Morillons  
CH-1211 Genève 22  
Switzerland  
Tel. (41-22) 799 69 59  
Fax (41-22) 799 76 50  
Internet: <http://www.ilo.org>

### EDUCATE Iceland

Grensásvegur 16a  
IS-108 Reykjavik  
Iceland  
Tel. (354) 511 26 60  
Fax (354) 511 26 61  
ReferNet National Co-ordinator:  
Mr Arnbjörn Ólafsson  
E-mail: [arnbjorn@mennt.is](mailto:arnbjorn@mennt.is)  
Internet: <http://www.mennt.is/>

### EFVET

European Forum of Technical and  
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Rue de la Concorde 60  
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Belgium  
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### KRIVET

The Korean Research Institut for  
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Corea  
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Internet: <http://www.krivet.re.kr>

### TI

Teknologisk Institutt  
Akersveien 24C  
N-0131 Oslo  
Norway  
Tel. (47-22) 86 50 00  
Fax (47-22) 20 42 62  
ReferNet National Co-ordinator:  
Ms Signe Engli  
E-mail: [signe.a.engli@teknologisk.no](mailto:signe.a.engli@teknologisk.no)  
Internet: <http://www.teknologisk.no>

### ETF

European Training Foundation  
Villa Gualino  
Viale Settimio Severo 65  
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Italy  
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### NCVVER

National Centre for Vocational  
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### European Schoolnet

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Belgium  
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Overseas Vocational Training  
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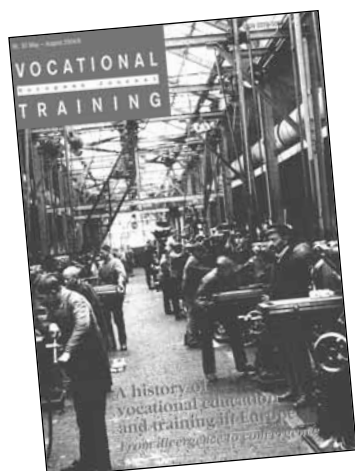
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Development of Vocational Training

Europe 123, GR-570 01 Thessaloniki (Pylea)  
Postal address: PO Box 22427, GR-551 02 Thessaloniki  
Tel. (30) 2310 490 111 Fax (30) 2310 490 099  
E-mail: [info@cedefop.eu.int](mailto:info@cedefop.eu.int)  
Homepage: [www.cedefop.eu.int](http://www.cedefop.eu.int)  
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