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

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# Dear Editor,

Kindly allow us to supplement Mark Blaug's excellent article on school leavers (EJVT, No. 22) with some observations based on evidence from our related research. Mr Blaug's comment on "What are we going to do about school leavers?" covered mostly the preventive side of the issue and left some room for discussing the question "What do we do once non-completers have left school?"

The "Transition Observatory" of the Pedagogical Institute (Greek Ministry of Education) has been conducting school dropout surveys for the past ten years and has accumulated valuable qualitative data on compulsory education leavers. In 1995, ninety interviewers (all experienced school teachers) asked a nationwide representative sample of 1,450 dropouts, aged 15-17 years old, a variety of questions concerning school attendance, educational attainment, work involvement while in school and after dropping out, occupational aspirations and plans, and training needs. These questions led to some interesting findings. Among them, we selected the following critical characteristics for discussing the therapy issue:

❑ **Low socio-economic and educational levels.** Some dropouts faced additional problems related to sickness, divorced parents, parents' death etc.

❑ **Diversity in knowledge and skill background** with varied basic knowledge deficits, relative to vocational training prerequisites.

❑ **Diversity in work experience.** The large majority of school leavers were working after leaving school as low-skill labourers in construction, agriculture, automobile maintenance and other services.

❑ **Negative educational experiences** accumulated while in school attributed mainly to marginal or sub par achievement levels. Failure in mathematics, physics and foreign language was the primary incentive to leave school.

❑ **Realistic occupational aspirations** (relative to self awareness and labour market demand) were manifested in their declared interest to overcome their serious educational deficit, because a compulsory education leaving certificate is prerequisite to all formal training.

❑ **Strong motivation** to attend special training courses was reinforced retroactively (following their low-level occupational tenure) by the realization of the importance of formal qualifications in the world of work.

Based on these findings we concluded that the design of special training courses for school leavers should seek the services and cooperation of several experts experienced in addressing such special needs as youth counseling, vocational orientation and guidance, modularized curriculum development and local labour market analysis. In this framework, we proposed the following curriculum design principles (Paleocrassas et al, 1997):

❑ The structure of training courses must be **modular**. Open-learning, individualized instruction and tutoring schemes should be considered as alternative delivery methodologies or as components of a composite didactic design, in order to face successfully the diversified knowledge and skill background of the trainees.

❑ The structure of training courses must be **transitional**. Curriculum designs must facilitate interfacing with existing continuing training schemes (preferably those which lead to formal qualification), thereby broadening the prospects of school leavers for further professional development.

❑ Training courses must be **integrated**. As a result of the low self-esteem of the trainees, because of school failure, the courses must be comprehensive, integrating remedial education, counseling, vocational skills and motivation developing components.



□ Training courses must be **contextualized**. It is not wise to select school-based training and assessment schemes for trainees who carry many negative experiences from formal schools. Commence the training with an apprenticeship experience. This would contextualize learning in an authentic work environment, which will put the trainees initially at ease and will motivate them for consequent learning of theoretical concepts.

□ Training courses must be **tripartite-driven**. Courses with low employment prospects would undermine their effectiveness and credibility with school leavers. To minimize unemployment risks following graduation, local social partners must be involved with all aspects of the design and delivery of training programmes.

□ Training programmes must be **institutionalized**. Informal and occasional training provisions for school leavers are pseudo solutions, eventually leading to degeneration. Only institutionalization, in the framework of tripartite planning and cost sharing, will assure continuity and stability for such socially critical youth targeting policies.

In conclusion, we subscribe to Mark Blaug's final statement in his article:

“Once non-completers have left school, we need to draw them into vocational training programmes that result in certificates of competence.” And we add: These programmes must be carefully designed if they are to be effective in attracting and retaining school leavers and, most importantly, in protecting them from social exclusion. Our research evidence also reinforces Dr. Blaug's concern that the issue of certification needs to be explored further, if it is to facilitate rather than impede a solution for the problem “What are we going to do with school leavers?”

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(Paleocrassas, S. N., Rousseas, P. and Vretakou, V. (1997). “Designing Special Vocational Training Courses for School Dropouts: The Case of Greece”, **International Journal of Vocational Education and Training**, Vol. 5, No. 2, pp. 57-64.)



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# The Leonardo da Vinci programme (1995-1999) in Spain: Results of an evaluation report



**Lorenzo Cachón Rodríguez**

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## Introduction

Since the 1970s, the European Union has taken a lead in vocational education. The Leonardo da Vinci programme is part of this scenario, and has built on the various programmes carried out since the mid-1980s (such as PETRA, Comett, FORCE, Eurotecnet, Lingua, etc.) under the influence of the EU Treaty and the 1993 white paper, Growth, Competitiveness, Employment. In the Spanish context, the Leonardo programme was implemented at a time of far-reaching changes in the vocational education system, brought about by adoption of the 1990 Education Law (LOGSE), when Spanish society was starting to pay increasing attention to the European dimension of education and training.

## The Leonardo da Vinci programme

On 6 December 1994, the Council of Ministers adopted the Leonardo da Vinci programme for the five-year period 1995-1999 (Decision 94/819/EC, OJ L 340, 29 December 1994). The programme set out to promote projects for the improvement of quality and innovation in vocational training in Europe. Among its aims were the following:

- a) improving the quality and capacity for innovation of vocational training systems;
- b) promoting lifelong learning in order to meet the needs of workers and employers;

- c) promoting the learning of key skills and language skills;
- d) updating training to keep pace with social and technological changes;
- e) using information technologies for open and distance learning;
- f) providing training for young people and adults who lacked education or were at risk of social exclusion;
- g) making qualifications transparent.

These broad aims were crystallised into five programme priorities, which Member States applied in practical form within their respective territories:

- a) learning of new skills;
- b) closer collaboration between education and training centres, and employers;
- c) combating exclusion;
- d) investment in human resources, and
- e) widening access to knowledge by using the tools of the information society in the context of lifelong learning.

To apply these aims and priorities, the programme covered 23 types of action, grouped into three strands relating to both initial and continuing vocational training:

- a) Strand 1: Supporting improved vocational training systems and measures in Member States.

**The Leonardo da Vinci programme was implemented in the period 1995-1999 against a background of far-reaching changes in the Spanish vocational training system. This article looks at the conclusions and recommendations of a report commissioned by the Spanish authorities on the Leonardo da Vinci programme in Spain**



b) Strand 2: Supporting improved vocational training schemes of interest to both employers and workers, including cooperation between universities and enterprises.

c) Strand 3: Supporting the development of language skills and knowledge, and the dissemination of innovations in the field of vocational training.

To carry out the programme, each Member State set up its own institutions to complement those created at European Community level. In Spain, a steering committee was established (the 'Leonardo Steering Committee') as was a national coordinating body (the 'Spanish Leonardo da Vinci Agency'). Members of the committee were drawn from three sources: central government, the autonomous communities with competence for vocational training, and the social partners. During the final phase of the programme, it had 25 members: two chairmen, one from the Ministry of Education and Culture, and the other from the Ministry of Labour and Social Affairs; eight representatives of various decision-making agencies of the Ministries of Labour and Social Affairs, and Education and Culture; seven representatives of the Autonomous Communities; four representatives of employers' organisations; and four representatives of trade union organisations). The most important functions of the Steering Committee were to approve and publicise at national level invitations to submit proposals under certain schemes (specified in Decision 94/819/EC), and to act as a point of contact for the Commission for consultation and information.

For the day-to-day management of the programme, the Steering Committee was assisted by the Spanish Leonardo da Vinci Agency. In response to a proposal made by the Spanish Government, the Commission appointed the company *Tecnología y Gestión de la Innovación S.A.* (TGI) to discharge the responsibilities of that agency. The company started working as the Spanish Leonardo Agency in April 1995, and retained that position throughout the first phase of the programme. Its functions were laid down contractually by the European Commission, and related essentially to operations, facilitation, dissemination and publicity.

## Vocational training in Spain

For an understanding of the changes that have occurred in vocational education and training in Spain in recent years, some attention should be paid to the profound transformation of industry and the labour market over the last twenty years. The crisis experienced by Western economies that began in the mid-1970s, the economic growth in times of expansion, the opening-up of the market and the internal changes within enterprises, both technological and organisational, produced far-reaching changes in the commercial economy and in the qualifications and skills of the labour force. The demands made on the education system by industry have changed radically during this period.

The educational reforms undertaken in Spain in recent years need to be seen from two angles: firstly, as a process of evolution within the education system itself, in response to the inclusion in the Constitution of the right to education and in recognition of the shortcomings which had been holding the system back, especially in the fields of vocational training and university education; and secondly, as an attempt to respond to the new and pressing demands being made on the education system by industry. The Education Law (LOGSE) 1990, which laid down a general framework for the education system, preceded by the University Reform Law (LRU) 1983, played a fundamental part in this restructuring of the Spanish education system.

LOGSE embodied the broad consensus reached through wide public debate on the new shape to be taken by the Spanish education system. The law sought to remedy a number of structural problems and shortcomings in the education system then in force (which had been laid down in the General Education Law 1970), such as the lack of educational provision before the age of compulsory schooling; the misfit between the end of compulsory schooling (14 years) and the minimum age of legal responsibility (16 years); the existence of two forms of certification at the end of general basic education; the general perception of vocational



education as an excessively school-based alternative type of education disconnected and far removed from the world of work; the design of the *bachillerato* secondary leaving certificate as a first step towards university; and the mismatch between the demand for intermediate-level specialist technicians from industry and the supply of graduates leaving universities.

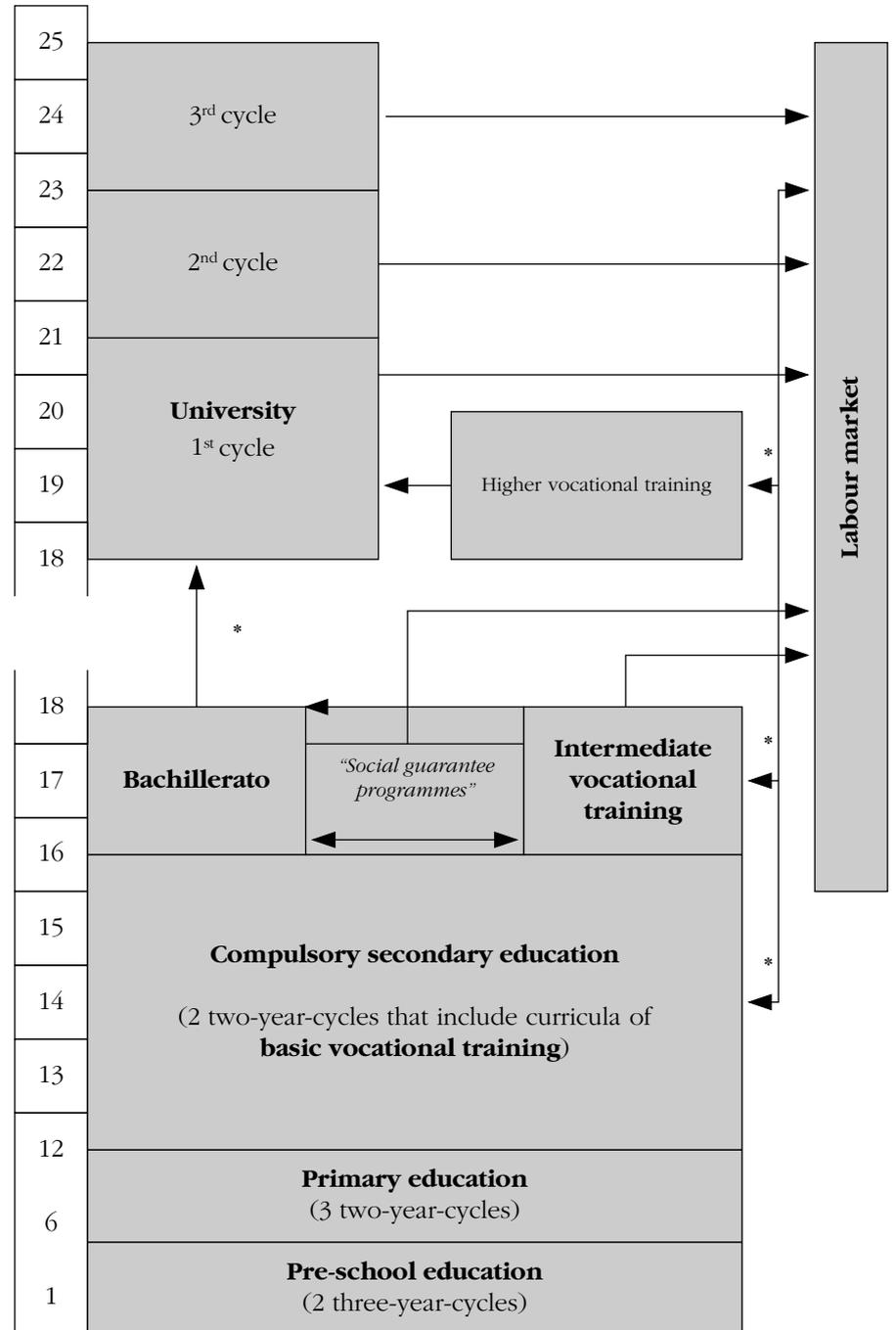
LOGSE therefore split education into four major stages: 1) pre-school education; 2) compulsory primary and secondary education (both compulsory and free); 3) post-compulsory secondary education: *bachillerato* and intermediate vocational training; and 4) higher education: university and higher vocational training (see table).

Before LOGSE, vocational education and training (VET) in the school context suffered in Spain from a failure to meet the requirements of industry, from the compartmentalisation of the various VET systems, from want of labour recognition, and from a certain lack of social prestige. LOGSE 'ushers in a far-reaching reform of vocational education and training ... in the knowledge that this is one of the problems of the current education system which require thorough-going and urgent resolution, and that this is an area of the utmost importance for the future of our economy'.

LOGSE set up a single vocational education and training system comprising regulated or initial VET within the education system, occupational VET and continuing VET. It therefore stipulated (in Article 30) that 'vocational education and training shall comprise all those courses which, within the education system and governed by this Law, provide training for the competent performance of the various occupations. It shall also include those other occupational vocational training activities which, being directed at continuing training in enterprises and at entry or re-entry to the labour market by workers, are provided through occupational vocational training governed by its own system of standards. The public authorities shall ensure coordination between both types of vocational education and training'.

LOGSE introduced the principle of education and training throughout life, i.e.

**Table**  
**Structure of the Spanish education system since 1990 and its relationship with the labour market**



(\*) Entrance exam or exam to obtain diploma

lifelong learning. It states in the preamble that 'the rapid pace of cultural, technological and economic change faces us with the need for frequent realignment and updating, and for new skills. Education and training will acquire a fuller dimension than they have had in the past,



will extend beyond the period of life to which they have been restricted until now, will embrace those with previous work experience, and will alternate with employment. Education will be lifelong, and the Law therefore proclaims it so to be, stipulating that it shall be the basic principle of the education system'. The Law then states (in Article 2.1) that 'the education system shall have lifelong education as its basic principle. To this end, it shall prepare pupils to learn for themselves and shall assist adults to take part in different forms of learning'.

LOGSE set out to foster the involvement of the social actors in the design and planning and in the evaluation of courses, especially in the field of vocational education and practical training at the workplace. Besides ensuring continuity from the discussions held before the Law was adopted, this stimulated the active participation of all social actors in all fields of VET.

One of the major challenges posed by LOGSE was the renewal of the content of training. Following a methodology new to Spain, occupational areas of industry were defined from sectoral studies, and the various occupational profiles were grouped into 20 families. These occupational profiles were collated in a 'List of Job Titles', comprising 135 titles, 74 of which are at higher technician level, and 61 at technician level. Specific skill units and associated training models were identified for each job title. This list of job titles needs to be revised periodically to keep abreast of changes in the world of work. In parallel, the Ministry of Labour and Social Affairs, through the National Institute of Employment, drew up an 'Index of Vocational Certificates', which lists the certificates awarded at the end of occupational VET (it currently contains 110 vocational certificates).

The current challenge facing government bodies and the social partners in this field is to construct a 'national system of vocational qualifications', as can be seen in the 2<sup>nd</sup> National Vocational Training programme.

The consultative instrument for the institutions involved in VET, which advises the government, is the *General Council for*

*Vocational Training*. This was set up in 1986 and comprises the autonomous communities and the social partners, as well as central government.

Matching VET to the needs and demands of the labour market, from the perspective of both employers and workers, has been a concern of growing importance between the social partners. The 1984 'Economic and Social Agreement' (ESA) referred already to the 'remoteness of VET from the genuine needs of the workforce' in Spain. The last pact signed in this field, on 19 December 1996, stressed that 'vocational training is a key factor both for the proper functioning of the labour market and the creation of employment, and for the social and occupational advancement of workers and the effective development of equal opportunities. It is also an essential factor in the competitiveness of business and the quality of services and products.' The signing of the ESA was followed by the establishment of the General Council for Vocational Training and the drafting of the 1<sup>st</sup> national programme for occupational training and employment (FIP Plan) a few months before Spain joined the European Community. A number of agreements reached in the 1990s under the auspices of LOGSE made it possible to exploit the benefits of that law by involving the social actors fully in the field of vocational training at various levels, and ensuring that it is they that manage continuing vocational training through FORCEM (*Fundación para la Formación Continuada en la Empresa* – foundation for in-company continuing training)

The Leonardo da Vinci programme was implemented in the period 1995-1999 against this background of far-reaching changes in the Spanish vocational training system.

### **An assessment of the Leonardo da Vinci programme (1995-1999) in Spain**

Decision 94/819/EC provided that before the first phase of the programme expired on 31 December 1999, the national authorities should deliver a report to the



Commission on how the programme had been implemented and evaluating its impact in a number of areas. In October, the Spanish authorities commissioned a team of sociologists at the Universidad Complutense de Madrid to draw up this report on the Leonardo da Vinci programme in Spain according to a set of requirements and a scheme laid down by the offices of the European Commission.<sup>1</sup> The remarks that follow give a fair impression of the conclusions and recommendations reached in that report.

### Conclusions on general aspects of the programme

The Leonardo da Vinci programme, like other Community programmes and initiatives, may be important for the part they play in building Europe, as well as for the results achieved in terms of their specific objectives. In the case of Leonardo da Vinci, despite the limited resources allocated to the programme, it can be stated that it has made an effective contribution to this process of 'creating Europe'. It has done so in at least three ways: firstly, through the direct effects of the objectives of the programme itself; secondly, through the indirect impact of such measures as placements and exchanges, which act as a sounding board for the programme; and thirdly, because the programme has revealed current obstacles to the building of Europe (such as the lack of recognition of qualifications across the EU), and has served as a stimulus to overcoming these.

The Leonardo da Vinci programme has been well received in Spanish society. This is evident from the fact that some 800 promoters put forward 3,098 projects in the five-year period 1995-1998. It is thus well established, but among a limited group of promoters (as is demonstrated by the fact that only just over 200 promoters did not have any of their projects approved). The following factors have contributed to the establishment of the programme:

- a) Experience of previous Community programmes (such as Comett, Eurotecnet, FORCE, PETRA, Lingua);
- b) The role played by the authorities in publicising the programme;

c) Growing awareness among the social partners and the actors involved in VET in Spain; and

d) The development of a large network of technical support services (in institutions, trade unions and employers' organisations), and of specialised consultancies.

Twelve per cent of the 7 054 projects approved under the programme throughout Europe between 1995 and 1998 were proposed by Spain; in terms of resources, this accounted for 10% of the total (EUR 52 million out of EUR 513 million). Over the whole period 1995-1999, Spain put forward 3 098 projects, of which 1 023 were approved, i.e. 33% of those proposed. Sixty-one per cent of the projects approved fell under placements and exchanges under strand I, followed by pilot projects under the same chapter (12%), placements and exchanges (11%) and pilot projects (10%) under strand II, and surveys and analyses under strand III (3%). Madrid, Catalonia, Andalusia and the Community of Valencia accounted for over half of the projects approved. A total of 9 143 persons benefited from placements and exchanges under Strand I, and 3 129 persons under strand II. Andalusia, Catalonia and Madrid accounted for half of the beneficiaries under strand I, and Castille and León and the Community of Valencia for the majority of beneficiaries under strand II.

The fact that the programme built on experience of the main action lines under programmes such as Comett, Eurotecnet, Force, Petra and Lingua, and set out to draw these together, meant that Leonardo was extremely complex and rigid in its objectives.<sup>2</sup>

The experiences of mobility (placements and exchanges) which the programme encouraged throughout the five-year period showed up a number of institutional factors which require further attention within the EU, such as inadequate recognition of qualifications, the need to simplify formalities hampering the free movement of workers (e.g. the need to apply for a residency permit if the intended visit is longer than three months), and insufficient harmonisation of legislation on security of employment.

***"In the case of Leonardo da Vinci, despite the limited resources allocated to the programme, it can be stated that it has made an effective contribution to this process of 'creating Europe'."***

(<sup>1</sup>) In the preparation of the report, besides a review of the documentation available from various sources, a postal survey (*UCM-LdV-99 Survey*) was conducted among all the promoters with projects approved during the five-year period (599) and a selection of promoters whose projects had not been approved (224). A total of 173 replies were received from promoters with projects (these had run a total of 545 of the 1,023 projects approved in Spain over this period). Forty personal interviews were also conducted with experts who had been involved in the programme (from various government departments, trade unions, employers' organisations, specialists, promoters, etc.).

Work in progress was presented in November to a meeting of the Leonardo Steering Committee in Spain. The first draft of the report was discussed with the authorities at the Ministries of Education and Culture, and Labour and Social Affairs, and a second draft was presented at a meeting of a working group of the Steering committee before the final version was submitted to the national authorities and the European Commission. The report will be published shortly by the Ministry of Labour and Social Affairs: L. Cachón (ed.), *Informe sobre el Programa Leonardo da Vinci (1995-1999) en España*, Madrid, 30 December 1999.

(<sup>2</sup>) The Council Decision of 26 April 1999 setting up the second phase of the Leonardo da Vinci programme simplified these objectives.



***“The overall administration of the programme scored a ‘fail’ (...) in the period covered, and a bare ‘satisfactory’ (...) in the reasons given for selection. There was repeated criticism of excessive bureaucracy and ‘paperwork’.”***

In the case of pilot projects<sup>3</sup> and surveys and analyses, satisfactory formal completion was often not accompanied by subsequent follow-up, which would have enabled the results to be disseminated adequately and would have created a ‘Leonardo effect’ on VET in Spain and Europe.

### **Conclusions on the functioning of the programme**

The *UCM-LdV-99 Survey*<sup>4</sup> asked promoters to evaluate the three levels of government responsible for implementing the programme (the European Commission, and the national and autonomous governments), and the two agencies responsible for administering the programme (the Technical Assistance Office (TAO) and the Spanish Agency) under five different headings: information, evaluation and selection of projects, technical support, reasons given for decisions, and management. They were asked to describe the performance of each institution in the fields for which it had some responsibility on a scale from 1 (worst) to 5 (best). Hence, the mid-point (3) could be said to mean ‘satisfactory’. The average scores across all the functions surveyed gave the following results: the best score (3.7) was achieved by the Spanish Agency, followed by the national government (3.1), the Commission and the autonomous governments (2.9), and finally the TAO (2.8).

The overall administration of the programme scored a ‘fail’ (2.7) in the period covered, and a bare ‘satisfactory’ (3) in the reasons given for selection. There was repeated criticism of excessive bureaucracy and ‘paperwork’. In this area, a distinction can be made between the performance of the Spanish Agency, which was seen to be better, and that of ‘Brussels’. The danger that arose from these excessive bureaucratic demands was that promoters of good projects would lose faith in the programme and not take part in it.

With reference to the functioning of the programme at Community level, those interviewed stated that the Commission surrendered too much responsibility to the TAO (until 1998), and that Spain had little presence in the Community Leonardo daVinci Committee. The TAO, for its part, was failed by the promoters in the UCM-

*LdV-99 Survey* and was much criticised for excessive bureaucracy, lack of transparency in its management, lack of support for projects, lack of coordination between its departments, lack of information about its functions and structures, excessive centralisation in its management of projects, lack of communication with promoters, and lack of clarity about quality criteria in the selection of projects.

There was some confusion about certain responsibilities and functions of the institutions set up in Spain, on account of the ‘appropriation’ of the Leonardo da Vinci ‘brand name’ by the Spanish Agency and the identification of this brand name with (the name of) the company managing the programme. The Leonardo da Vinci Steering Committee did act as a useful platform for dialogue, even though it was highly centralised because of the relative predominance of the Ministries of Education and Culture, and of Labour and Social Affairs, over the autonomous communities and the social actors. The Spanish Agency received a good score from the promoters, but much more criticism from the decision-makers and experts interviewed, who pointed, for example, to a lack of transparency in the appointment of the company TGI in this capacity, the assumption by the agency of functions proper to the steering committee, and the remoteness of the agency from government bodies with responsibility for VET.

Many of those interviewed suggested changes in three aspects of the management model for the programme in Spain:

a) there were varied opinions as to whether the management should still be in the hands of a private company or should pass to a public or tripartite body.

b) possible decentralisation of the management of the programme in Spain to the autonomous communities: while there were two main positions, those who preferred the centralised model, and those who preferred decentralisation, an opinion shared quite widely was that the autonomous communities should play a more active part in the management of the programme.

c) greater clarity in the relations between the agency and the committee, whereby

<sup>(3)</sup> There is no definition properly speaking of pilot projects. The concept of pilot projects appears for the first time in the annex to the Council Decision of 6 December 1994 establishing an action programme for the implementation of a European Community vocational training policy (94/819/EC). The text of the Decision can be found at: <http://europa.eu.int/comm/education/leonardo/94819en.doc>. For general information consult the site of the DG for Education and Culture for Leonardo I: [http://europa.eu.int/comm/education/leonardo\\_old.html](http://europa.eu.int/comm/education/leonardo_old.html).

<sup>(4)</sup> See note 1.



the latter should be more involved in the development of the programme: the proposals made about management by those interviewed generally tended in one direction – less bureaucracy and more resources.

There were (and these are indicated in the UCM-LdV-99 Survey and in the interviews) some problems with the functioning of the agency:

a) interviewees stated management had improved over the years but there were currently a number of problems relating to shortage of staff, staff rotation and lack of staff training;

b) the overall picture of dissemination and public relations was positive in relation to information about the programme, but negative in relation to dissemination of the results of projects;

c) in respect of support for promoters, it was stated that too much emphasis was placed on formal matters, with a lack of attention to the aims of projects and the quality of their outcomes; and

d) those interviewed stated that in the evaluation of projects, the selection and training of evaluators was good but not entirely satisfactory; that the criteria applied in evaluation left evaluators too much room for subjective discretion; and that there were problems in the relationship between the form and content of projects. This last point hinted at the major problem of projects which were well presented formally because they had been prepared by outside consultants, but said nothing about the willingness of the organisation in question to carry such projects through.

The visibility of the programme – given the volume of resources devoted to it – was acceptable and growing, but was far from providing a clear image of its aims. People who were well-informed knew that there was a Community programme called Leonardo, but most of them could not define its objectives. In the world of education, it was well-known at an institutional level, but in grassroots educational establishments it was only well enough known among professionals who took part in specific information networks.

It was not known in the world of business.

The programme was poorly represented on the Internet in Spain. The web page for the programme in Spain did nothing to aid the visibility of the programme or the dissemination of the results. It did not help to increase visibility because its address did not contain the name ‘Leonardo da Vinci’, merely that of the company managing the Spanish Agency; it did not indicate the relationship between the agency and the steering committee; it was difficult to find; the information which it contained was fragmented; some information was not updated; and it did not facilitate contact with and between projects. Further, neither the ministries responsible nor most of the autonomous communities gave information about the programme on their websites. Moreover, it was pointed out that the electronic addresses of the agency were personal names, which equally did little to improve the institutional image of the programme.

### **Conclusions on the impact of the programme**

Because of the complexity of the aims of the Leonardo da Vinci programme, and the facts that the first phase only ran for five years, many of its projects (especially, but not solely, those of 1999) were still in the development stage when the evaluation of the programme was carried out, and no specific analysis had been done on the results and impacts of the projects (no *ex-post* evaluation), it was difficult, on the basis of documentary evidence, to reach an assessment of the possible impact of the programme on VET in Spain and in Europe. All the decision-makers and experts interviewed agreed on this. However, from their skilled opinions and those of the promoters of the projects, some indication can be found of the influence of Leonardo da Vinci on VET in Spain.

The Leonardo da Vinci programme was designed as a tool for preparation for the 21<sup>st</sup> century, by way of raising the quality and innovative capacity of vocational training systems, since both quality and innovation are factors essential to the management of change in technology and the economy, and of their repercussions

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***“The majority of the decision-makers and experts interviewed stated that the programme was having a positive impact, although this was limited in the area of quality of training.”***

***“Three quarters of the promoters stated that they had concrete information derived from their projects which allowed them to state that the programme had a positive influence on the relationship between training and enterprises.”***

on the organisation of work and the competitiveness of business in our age. Its aim was to promote projects to improve the quality and innovativeness of vocational training in Europe, adding value to national training systems, and guaranteeing promotion and dissemination of what is best in each system. One promoter summed this up forcefully as follows:

‘I believe that Leonardo only needs to fulfil one objective: *to be a laboratory of innovation in VET*; if it achieves this one goal, then it will be meaningful to call it the Leonardo programme’ (C162).

Hence, investigation of the impact on the quality of training systems is an essential requirement. The programme may be helping to enhance the quality of the content of VET along the lines which this has been following in Spain since the adoption of LOGSE. Seventy per cent of the promoters of projects mentioned various fields of VET in which quality might be raised by development of materials, exchange of experiences, inclusion of the European dimension in the content of training, creation of networks, or improvement of relations between training centres and enterprises. The majority of the decision-makers and experts interviewed stated that the programme was having a positive impact, although this was limited in the area of quality of training. It would have more positive effects if government bodies made use of and publicised the results of the projects. One aspect on which there was unanimous agreement was the positive impact of placements and exchanges projects on the quality of VET. Under these schemes, the immediate benefits accrue to the people taking part in the projects, but these benefits are multiplied by dissemination of the experiences of the participants themselves, with the result that a ‘knock-on effect’ is achieved in the VET system.

The programme set out to help to enhance the economic competitiveness of the EU in the context of the information society, to foster growth that would produce more employment, to keep pace with changes in the economy, to support Community action in favour of small and medium-sized enterprises, and to strengthen research and development skills. The impact of the programme on the relation-

ship between training and enterprises started from a varied situation: while 18% of promoters of pilot projects considered that the relationship between enterprises and the training centres in their vicinity was good before they took part in the programme, 24% indicated that this relationship was non-existent, and the remainder took a view somewhere in between. The UCM-LdV-99 Survey provided some clear results in this field: 33% of promoters felt that the programme had had a ‘very positive’ effect on this relationship, and another 40% judged it ‘positive’, either because of the exchanges which it had encouraged or because of innovation in methodologies and content of training. Three quarters of the promoters stated that they had concrete information derived from their projects which allowed them to state that the programme had a positive influence on the relationship between training and enterprises. Although the programme was far from having achieved an influence on the world of business, it could be said that it contributed to strengthening the links between that world and the world of training. There was broad agreement that the programme had also helped to exploit the presence of the social partners in VET and had encouraged the involvement of new actors. Among the persons interviewed there was fierce disagreement about the role played by consultants in the preparation and implementation of projects. The majority agreed that this should be limited to support and technical assessment, and that consultants should not replace promoters in the management and implementation of projects.

The Leonardo da Vinci programme aimed to strengthen economic and social cohesion in the EU, to promote equality of opportunities, and to encourage active citizenship. One promoter pointed to the potential of one of the dimensions of Leonardo da Vinci for a particular target group (not the most usual) with special needs:

‘The Leonardo programme can provide support which complements VET since in most cases it helps the beneficiaries to take a more practical view of the situation in which they are working or studying. This effect is greatest if the group to which the project is



addressed has special needs for entry into employment, which is the case among the disabled' (C176).

The largest target groups to which projects were addressed were workers (in general), educators, VET students, university students, young people (in general), decision-makers and managers of human resources, and groups suffering from exclusion. Other far less common target groups were women and workers with inadequate qualifications. Such widely varying groups had different gaps in their education and training. The programme had a limited impact on access to training, and on improving access among these specific target groups. This impact was produced above all through the development of tools and methodologies and through the planning of specific training activities. A few promoters and interviewees pointed to a positive influence of the programme on equality between women and men in the field of VET.

The programme aimed to give added value through transnational cooperation between actors and operators in Member States, and to contribute to the development of a policy of cooperation with third countries, particularly the countries of central and eastern Europe, Cyprus and Malta. Transnational cooperation and the European dimension formed one of the basic features of the programme, being both one of its preconditions and one of its most visible consequences. Over 90% of promoters stated that the programme had enabled them to learn more about the situation of VET in the rest of the EU, and had helped to improve the bases for mutual recognition of qualifications and skills throughout the Community. The promoters regarded the experience of cooperation with partners in other countries as clearly beneficial because it contributed to the creation or strengthening of stable networks in the field of VET at Community level. The small promoters – especially those taking part in the programme for the first time – found it difficult to find partners with whom to put forward their projects.

The experience of transnational mobility gained through the arrangements for placements and exchanges within the programme deserved very positive comment.

These schemes gave participants new social skills for their personal and working lives, raised their self-esteem, assisted them to find work, and helped them to get to know new types of work and to practise the occupational and language skills which they acquired. Many promoters not only stated that placements and exchanges had improved participants' chances of finding work, but also that the programme was helping to raise the demand for mobility and the importance given in the selection of staff to experiences of this type. This positive assessment was moderated by the budgetary restrictions of the programme and the lack of recognition of non-university qualifications across the EU.

While the basic goal of the Leonardo da Vinci programme was innovation in the field of vocational training, what gives meaning to such innovation is the dissemination of its results so that it can spread throughout the training network, multiplying its effects both in vocational training systems and in the world of business. One expert summed up as follows the need for dissemination in the programme:

'Leonardo is as though you said: I carry out an experiment and discover a miracle drug, but it is useless unless I have a laboratory from which to manufacture and market it' (E2).

Dissemination of results was probably the worst aspect of the programme. It is a crucial issue because, since the programme aimed to encourage innovation in the field of VET in Europe, the dissemination of its results should have been one of its key elements. The results have in fact been disseminated: most of the promoters stated they were doing so, and that activities had been carried out to that end, but this dissemination was generally considered poor and ineffective. The explanation for this lack of effectiveness is complicated. In the case of the bodies responsible, it may range from a lack of the requisite professional and organisational ability, among the national agencies, to the want of an appropriate strategy and a lack of interest in the question on the part of the Spanish Agency. In the case of the promoters, the reasons for limited dissemination may have been the following:

***“The programme had a limited impact on access to training, and on improving access among these specific target groups. This impact was produced above all through the development of tools and methodologies and through the planning of specific training activities.”***

***“(...) promoters regarded the experience of cooperation with partners in other countries as clearly beneficial because it contributed to the creation or strengthening of stable networks in the field of VET at Community level.”***



***“The consequences of (...) poor dissemination were harmful to the programme. Its results did not become sufficiently well known, and projects were in danger of duplicating one another.”***

□ Financial problems: when promoters are obliged to make cuts because of budgetary constraints, they do so in the area of dissemination. As the interim National Report stated, ‘very few projects have defined a clear strategy and set aside funds specifically for dissemination. It is also likely that, because of budget cuts, the promoters of projects will spend less on this type of activity’.

□ Administrative obstacles: when promoters wish to disseminate their results, they encounter administrative obstacles which make this more difficult. Dissemination faces problems of *copyright*, since co-funding complicates the ownership of published outcomes, and this affects how they will be used. One person stated roundly that ‘there is great stress on intellectual property rights. But since it is public institutions which are involved, intellectual property should be shared’ (E34).

□ Difficulties with partners: these arise in some cases, either in the implementation of the project or in the subsequent use of its outcomes.

□ Difficulties in making contact with channels of publication (such as the press and specialist journals).

□ Lack of motivation for finalising the project: it should be borne in mind that dissemination takes place at the end of a project, when there may be some loss of motivation. This can add to problems associated with inadequate funding and administrative and legal difficulties, leading to inadequate dissemination of outcomes by promoters, so that the results remain on a shelf or in a box.

□ The problem of transferability of results, because of the particular nature of the outcomes.

The consequences of this poor dissemination were harmful to the programme. Its results did not become sufficiently well known, and projects were in danger of duplicating one another. There is little excuse for poor dissemination in the age of the Internet: the limited use made of this medium is extraordinary in a programme of which one of the principal aims was innovation.

## Some tentative recommendations

On the basis of the First Leonardo programme in Spain and the interviews conducted with decision-makers and experts, the team which produced the Spanish report made a series of recommendations to the Commission as possible areas for reflection by the authorities and the agencies responsible for the programme. These recommendations were arranged in five blocks, each of which was headed by a pair of key words: 1) ‘resources and objectives’; 2) ‘agencies and functions’; 3) ‘functioning and transparency’; 4) ‘promoters and partners’ and 5) ‘dissemination and the Internet’.

### Resources and objectives

□ Increase the funding for the programme.

□ Increase the funding for the projects approved under the programme in order to improve its implementation, and the quality of projects.

□ Raise the budget precepts for some aspects of projects (e.g. to facilitate visits by teachers and tutors to countries where work placements are arranged).

□ Stress improvement of equality of opportunities between women and men in the field of VET.

□ Give greater attention to those projects which, while meeting the aims of the programme, are addressed to groups at a particular disadvantage in the labour market, and move away from the tendency to focus on the less disadvantaged (such as those with a university education).

### Agencies and functions

□ Decentralise all possible functions to national institutions by applying the principle of subsidiarity to management. This would mean passing responsibility for management from ‘Brussels’ to national institutions so that projects can be followed up and supported more closely and more easily. The Commission would retain, in addition to its other functions, the ability (and the obligation) to supervise



the overall conduct of the programme and projects.

❑ Improve the coordination between the institutions managing the programme in Brussels and Spain.

❑ The management model adopted at national level should be discussed and agreed within the Leonardo da Vinci committee (and, where relevant, within the general council for vocational training) between central government (the ministries of labour and social affairs, and education and culture), the autonomous communities, and the social partners.

❑ Maintain the two levels of steering committee and national agency which obtained in the first phase of the programme, but with a more clearly established relationship between them in everyday matters as well as broader issues.

❑ There is no wish to pronounce on the public versus private nature of the national agency because this depends on factors which are not strictly technical in nature. However, it is proper to recommend that when the national agency is appointed, it should have clear functions, which should be associated with day-to-day management. The formulation of policy and strategies should be a matter for the steering committee. Similarly, it should be established clearly that the agency is subject to the decisions and guidance of the Committee.

❑ Make greater use of the regional level throughout the management of the programme. Ways should be found to enable regional management structures to be created with the participation of the autonomous governments, subject to coordination by the steering committee (in the case of guidelines for the programme in Spain) and of the national agency (in that of day-to-day management). If management cannot be regionalised in this manner, ways should be found to enable the Autonomous Communities to play a more effective part in the implementation of the programme.

### Functioning and transparency

❑ Make the institutions of the programme, at both Community and national

level and, where relevant, regional level, more transparent for promoters and users: who's who, who does what in which body, and contact addresses, should be clearly shown and regularly updated on the Internet.

❑ Make the administration of the programme more flexible.

❑ Increase contacts and communication between the agencies responsible and promoters, once projects are approved.

❑ Improve the evaluation of projects proposed, both in Brussels and in Spain, with the aim of reducing subjectivity and giving priority to the substance of projects and the characteristics of the promoters rather than to formal presentation.

❑ Improve the information distributed about the quality criteria required of projects.

❑ Require agencies which reject project proposals to give fuller reasons.

❑ Improve the mechanisms for selection and training of evaluators, both in Brussels and in Spain, so that only those persons are appointed who have adequate knowledge of vocational training systems and some experience in the field.

❑ Permit the submission of pre-projects so that the entire negotiation procedure for project selection is more flexible for promoters, even though selection has to be organised in 'two rounds'.

❑ Reduce bureaucratic procedures to the indispensable minimum administrative steps.

❑ Reduce the number of instalments in which payments are made to promoters.

### Promoters and partners

❑ Improve the arrangements for finding partners, at both Community and national level.

❑ Open special lines of support for small promoters and organisations, covering various aspects: how to find partners, project implementation, and accounting for expenditure.



□ Make greater use of, or establish, transnational networks for cooperation between employers and training centres.

□ Foster the creation and strengthening of networks of partners in specific areas.

□ Introduce flexible arrangements to remove a partner if it is hindering the implementation of the project or if it is not playing an active part in it.

#### **Dissemination and the Internet**

□ Make the Internet a real means of managing and publicising the programme, and of disseminating programme and project outcomes.

□ Create a 'virtual Leonardo da Vinci museum' for the entire programme accessible via the Internet, and linked with 'virtual Leonardo da Vinci museums' in each Member State (and, where relevant, each European region). This museum should make it possible to give a well-structured account, based on clear descriptors, of the outcomes of the Pilot Projects, of the Surveys and Analyses, and of the other Leonardo schemes, with the possibility of direct links to promoters and their projects.

□ Create a Leonardo da Vinci website in Spain directly dependent on the steering committee, with links from and to the ministries involved, the competent autonomous governments, the training agencies run by the social partners, and the National Agency.

□ Contractually oblige all promoters (of pilot projects and surveys and analyses) to publish at least basic information about their projects and about the results of those projects on the Internet, and if it should not prove feasible to impose this requirement, the authorities should publish this information automatically.

□ Establish links between the web pages of the Community programmes, and between these and national and independent programmes of VET.

□ Establish as the e-mail address of the programme in Spain one single address identifiable from the name, with the programme including official references to this address only or to the various functions.

□ Hold meetings on the programme in the various autonomous communities (with the participation of experts from throughout the state and from other countries), and set up forums to discuss key issues relating to the programme.

□ Create a 'Leonardo da Vinci Library' bringing together the documents and the best reports prepared under the programme. This collection could be published by some of the ministries involved in the programme under the auspices of the Steering Committee. This 'Leonardo da Vinci Library' could be the product of competitions arranged by the committee to disseminate the best practice of the programme itself.

□ Publish a Leonardo da Vinci programme journal in Spain, to appear at least at six-monthly intervals, open to all promoters, to report on the experiences of the activities carried out under the projects, and to facilitate exchanges of ideas, information and contacts between promoters. The journal should be published on the Internet, as well as in paper form.

□ Set up arrangements, in cooperation with the employers' and trade union organisations in the sector, to publicise the results of the programme among enterprises.

□ Establish a scheme to follow up project outcomes within the National Qualifications Institute to examine the uses which might be made of the various VET subsystems in Spain, and to link those responsible for administering each subsystem directly with those running projects.

□ Make greater use of the media to publicise the programme and the projects.



# Training in the context of a reduction in working hours



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## Introduction

The interest being shown in training time in France has been particularly topical since recent legislation reopened the issue of a reduction in weekly working hours. The second Aubry Act, promulgated in January 2000, laid the basis for a new relationship between working time and the time devoted to continuing vocational training, some of which may henceforward be expected to take place during "leisure" time. But the issue of the balance between training time and working time has been around for a long time. Thirty years ago it was the subject of negotiations between the social partners, and between them and government. Our aim is to show, through a sociological examination of the way in which time is structured for different social purposes, that training time was at first part of an attempt to reduce working time, but that this may now be giving way to an attempt to manage the social uses of time in order to make more hours available for training<sup>1</sup>.

It is impossible to talk about the time available for training the active population, i.e. those in the labour market (either employed or unemployed), without considering working time, which is this population's central activity. Training is an occasional and indeed an exceptional event, which is not usually part of people's everyday activities, or in other words, the time devoted to training must be taken away from their other activities. It upsets the usual arrangement of time, especially during working hours, because of the proximity between the purpose of work and that of vocational training. In

this respect, time appears to be a relevant indicator of the social value accorded to an activity, in this case, training; it points to the social meaning accorded to that activity both in terms of duration (much or little time being devoted to it), and in terms of the choices implied in the social uses made of time.

It should be stressed, however, that this problem of managing time presupposes a concept of training according to which training is an activity identifiable by the time devoted to it; this seems peculiarly French. The vague, generic term "training" covers what was in the 1970s referred to as adult education, continuing vocational training, social advancement, popular education, lifelong education, recurrent education, etc. Its aims generally relate to work: work done or work aspired to, in the hope of occupational advancement. Hence, it is commonly held that the training of the active population should be carried out during working time, which is in broad terms the view taken by the trade unions. In France, therefore, where the field of training is largely governed by legislation (the right to training, and the obligation to provide training), the amount of time devoted to it is a key factor.

What should be the balance between working time, which continues to account for most social time among the active population, and training time, especially if this is understood to include all aspects of education and training? The way in which this question is answered has changed greatly since the 1960s, largely because of the increasing trend towards reduced working hours, and the agreements reached have not proved sustainable.

**This article will show, through a sociological examination of the way in which time is structured for different social purposes, that training time was at first part of an attempt to reduce working time, but that this may now be giving way to an attempt to manage the social uses of time in order to make more hours available for training.**

<sup>(1)</sup> This article is based on a paper submitted to Agora VII, organised on this topic by CEDEFOP on 7 and 8 October 1999.



***“The emergence of the French notion of a right to training must therefore be seen as a right to claim the time to be devoted to training.”***

***“(…)the basic agreement between the social partners of 1970 (...) laid down the principle of the lawfulness of absence from work for training purposes and (...)set quantitative goals for the number of hours of absence from work in enterprises which were to be devoted to training..”***

***“It was not until 1982 that a clear distinction was made between time for training that was pursued at the instigation of the employee, which deserved to be regarded truly as leave, and time for training arranged by the employer as part of an enterprise training scheme. The agreement between the social partners which created individual training leave, enshrined in legislation in 1984, now clearly recognised a right to a reduction in working time (...) in order to pursue education or training (...).”***

<sup>(2)</sup> In the mid-1950s, a number of proposals for legislation were made in Parliament to introduce educational leave. See Y. Palazzeschi (1998).

<sup>(3)</sup> The need to make such a distinction arose out of a 1974 ruling by the Council of State. It took another 8 years before the social partners reached a new agreement (P. Guilloux, 1998).

The first observation that I shall make is that the negotiations that led to the 1971 Act in fact treated training time as a reduction in working time. That being so, it is logical that the demand for a major cut in working hours as such calls into question the principle that training should be given during working time.

My second observation will be that the increased significance given by employers to training their employees has usually led them to try to manage more efficiently the time which employees spend in training, to want to check how it is used, and to outsource at least some of the more lengthy courses.

My third observation will concern, by contrast with the first two points, the place of training in non-working time, principally in leisure time, but also in time spent in unemployment.

In this context, will the reduction in working hours lead to training time being shifted from working time to leisure time? In my fourth point I shall stress the limits to this displacement of training time, and the inescapable need for a new agreement to be negotiated between the social partners.

And finally, I shall look at the implications of a possible shift of training to leisure time, a shift that cannot be expected to happen spontaneously. This is a field of public action which I regard as important but which government does not yet seem to have taken on board. This applies especially to the regional bodies which are now responsible for the matter, education and training being one of the decentralised responsibilities which the state has devolved on to them.

## **The right to training leave**

It was thought in the 1950s and '60s that it was right to allocate training time to working time, i.e., to grant training leave, and this led to the 1971 Vocational Training Act, within the concept of lifelong education. The term “training leave” first appeared in the form of workers’ training leave (in the 1957 Act), which meant training time spent on trade union business,

and in that of leave for the training of youth workers (1961).<sup>2</sup> It acquired its true importance with the 1971 Act, which gave general effect to the inter-industry agreement of 1970. The emergence of the French notion of a right to training must therefore be seen as a right to claim the time to be devoted to training.

The only thing I shall say about the basic agreement between the social partners of 1970 is that it laid down the principle of the lawfulness of absence from work for training purposes (the word “leave” not being mentioned), and that it set quantitative goals for the number of hours of absence from work in enterprises which were to be devoted to training. It should also be pointed out that no distinction was made between training pursued at the instigation of the employee and that imposed by the employer. This obviously derived from a perception of training as consisting essentially of one-off or extended courses outside the place of work. This ambiguity, which lumped together the possibility for employees to absent themselves while being paid in order to take a course of their choice, whether vocational or not, and the potential obligation on them to take part in a retraining or updating course for the purpose of their work, made it possible for the agreement to be signed on the basis that any education or training was definitively in the interest of both the employee and the enterprise.

Subsequently, in actual practice, it was left to employers either to arrange training serving the interests of their enterprise for all or part of the number of hours to be devoted to training, or to leave employees to use these as they saw fit. The key thing to be borne in mind here is that training that was useful for work, or even indispensable, was regarded as a reduction in working time.

It was not until 1982 that a clear distinction was made between time for training that was pursued at the instigation of the employee, which deserved to be regarded truly as leave, and time for training arranged by the employer as part of an enterprise training scheme.<sup>3</sup> The agreement between the social partners which created individual training leave, enshrined in legislation in 1984, now



clearly recognised a right to a reduction in working time, over a given period, in order to pursue education or training for anything up to 1,200 hours, while still being paid. That does not mean, however, that time spent in training under a training scheme was regarded as working time. Both employers and employees still perceived training time which was necessary to the enterprise as absence from work.

It should be pointed out as well that this right to training leave, to time for education and training to be taken out of working time, was a principle that was applied infrequently in practice: even in the best years, there were no more than 34,000 beneficiaries of individual training leave (in 1994)<sup>4</sup>, compared with the more than 3 million employees trained under enterprise training schemes. No doubt some employers left it up to employees whether they wished to take advantage of training opportunities. Individual training leave nonetheless provided the best safeguard for employees to train on their own initiative. I shall not go here into the detailed reasons which led to employers and government to restrict access to it.<sup>5</sup> The most important point was that even where an employee's training did not directly benefit the employer, it was accepted that the time devoted to it might be taken from working hours. Hence, training leave acquired a symbolic value in the French system of continuing vocational training.

The predominant perception that training time should be taken out of working time even where the subject-matter was not immediately occupational, was reflected particularly in the spread of legal recognition of training leave for specific purposes (sabbatical leave, examination leave or skills assessment leave, leave for elected representatives, voluntary firemen, etc.); although this leave was not always paid, the employer had nonetheless to grant it. It should also be recognised that the scale of education and training pursued outside working time is difficult to evaluate because few studies or surveys of it were conducted; it was merely found that the funds which the Regional Councils devoted to social advancement training, and evening and Saturday courses, declined sharply.

## Towards the reclassification of training as work

### Changing practice

The 1971 Act did not lay down any target or threshold number of working hours to be devoted to training, while the inter-industry agreement of 9 July 1970, on which it was based, had set a ceiling, which was also taken to be a target, of 2% of staff in an establishment undergoing training at any one time (Article 27).<sup>6</sup> with allowance for this figure to rise to 3% in the case of induction.<sup>7</sup> This provision implied an attempt to train something like 4 to 4.5% of all wage-earners, according to Raymond Vatier (1978). This initial target set by the social partners was soon reduced under the 1971 Act, which merely set a spending target limited to 1% of the wage and salary bill.

What was actually happening in enterprises should also be borne in mind. For their own internal purposes, was there really any need to devote part of working time to training employees, or even to satisfy their demand for training? Did employers simply agree because they had to comply with the obligations imposed on them? Some enterprises, notably large companies, did not wait for the 1971 Act before realising that training was one of the tools necessary for the management of their human resources. But the majority only took an interest once they found themselves obliged to apply the regulation introducing so-called compulsory participation in continuing training, which imposed on them a minimum expenditure on training, initially 0.8% of the total wage and salary bill, a figure that has now risen to 1.5%.

In practice, the average level of this expenditure by all enterprises with more than 10 employees was more than double the legal minimum. But that statement hides two contrasting attitudes, according to the size of enterprise: only those employing more than 500 staff exceeded a figure of 3%,<sup>8</sup> while those with between 10 and 49 employees remained very close to the legal minimum. It can be said that most of the former group at least believed henceforward that such expenditure primarily met an internal need. This was

(<sup>4</sup>) This figure fell to less than 25,000 in 1996: cf. the vocational training annexes to the draft Finance Acts.

(<sup>5</sup>) Patrick Guilloux (1998) has explored these fully in date order.

(<sup>6</sup>) Only half of the number of employees undergoing training purely at their employer's behest were taken into account in this calculation (Article 30).

(<sup>7</sup>) Supplementary agreement of 30 April 1971, Article 5.

(<sup>8</sup>) These enterprises cover 44% of the French employees concerned (i.e. excluding public bodies and enterprises with fewer than 10 employees), and 63% of employees trained in 1996 (Péry, 1999).



***“(...)training situations should not be limited to courses giving rise to expenditure shown under the heading of compulsory participation in training; so-called workplace training should also be taken into account.”***

confirmed by a Céreq survey carried out in 1993 under the FORCE programme on continuing vocational training in European enterprises.<sup>9</sup> The training which was arranged as a result was generally short-term; more than three quarters of courses were of less than 40 hours' duration (Péry, 1999).

In this context, training situations should not be limited to courses giving rise to expenditure shown under the heading of compulsory participation in training; so-called workplace training should also be taken into account. It is only recently that attention has been given to this in France, although it may be supposed that it has been carried out for far longer. It has been closely defined as: “any planned period of staff training aimed at the acquisition of knowledge or practical experience in a working situation, with the help of the tools normally used” (Aventur, 1998), and it is subject to precise criteria: the time devoted to it has to be limited, for example. The Céreq survey mentioned above sets the average time spent on this type of training at one and a half days per month. It is obvious in this case that training time is only a particular way of using working time. But as a consequence, it may be thought that courses which serve some purpose necessary to the proper functioning of the enterprise are increasingly often arranged in this way. In other words, they no longer require absence from work or the occasional reduction in working hours.

### **Changes in the rules governing the management of employment**

While it is now taken for granted that some training courses should take place during working time because they serve the interests of the enterprise and are therefore planned and organised by the employer, there are others which are only held during working hours because of rules that leave employers no choice.

This is primarily the case with individual work contracts permitting the beneficiaries to acquire both training and vocational experience, which are often used as the first step towards more permanent employment. These contracts are largely for young people and offer apprenticeship, orientation, skills training or updating.<sup>10</sup>

They contain a compulsory element of training for a given period. There are also job scheme contracts and consolidated job contracts, which may include training during working time, the content and duration of which are then laid down contractually from the outset. In all individual contracts, the rule is that training time must be incorporated into working time.

Another form of obligatory inclusion of training time in working time results from changes in court rulings on employment contracts. The courts may now find that a dismissal is unlawful if it follows a change of position which is not accompanied by training to enable an employee to fulfil his or her new duties, basing such a finding on a judgment given by the French Supreme Court (Cour de cassation) in 1992.<sup>11</sup> This represented a major change, deriving a duty of loyalty on the part of the employer from the general principles of the law of contract (Willems, 1996). While training which is the employer's responsibility must obviously take place during working time, the employee, in return, has the obligation not only to take the course and to complete it successfully but also, when he or she returns to work, to demonstrate a greater ability to fulfil his or her duties. Training may thus reinforce the subordination of employee to employer (Etiennot, 1998).

However, since the adoption of the second Act on the negotiated reduction in working hours, this principle is now to be found in the Employment Code (L. 932-2): “The employer has the obligation to ensure that his employees receive training updating their skills in accordance with changes in their jobs”, and the article lays down, among other things, that “any training pursued by an employee under this obligation shall be regarded as amounting to working time.” This strict rule reflects provisions contained in the agreements negotiated by the various industries following the first Aubry Act. The engineering industry (28 July 1998) had shown itself particularly radical, all training being excluded from the calculation of actual working time. This did not mean that employers completely withdrew from any financial involvement, but it was confirmation of the notion that training time is not working time. As a consequence,

<sup>(9)</sup> The results for French enterprises show (Aventur, 1998) that among the aims pursued by those which have organised training, 4 purposes account for 85% of replies: facilitating technical change, improving product quality, inducting new staff, and developing multi-skills; helping career development and assisting outside resettlement only account for 2% of the primary purposes stated, and 4% of the secondary purposes.

<sup>(10)</sup> It is also possible to take on persons over 26 years of age under training contracts, but this is still in the experimental stage; the initial trial was scheduled to last until 31 December 2000, but this has been extended in the 2001 Finance Act until 30 June 2002.

<sup>(11)</sup> Social Division, 25 Feb. 1992, Société Expovit v. Mme Dehaymin.



“the organisation of training thus escaped the rules on working hours: maximum daily and weekly hours, overtime, variations...” (Luttringer, 2000).

Although the practical provisions laying down how the costs were to be shared between engineering employers and employees have not been made redundant by the second Act, the principle that was assumed to underlie them has been invalidated by the new legislation. Where the purpose of training paid for by the employer is to update staff, this states that such training should be incorporated into actual work.<sup>12</sup>

The question of the length of updating training remains open, however. According to Nicole Maggi-Germain (2000), it may include long training courses in specific skills. It seems nonetheless to be more commonly accepted that if they open the way to new skills, these courses cease to constitute updating and fall under different rules. Whereas certain courses are classified as work, paragraph 2 of the same article of the Code permits “employees’ skills development” to take place partly outside working hours. Its purpose is then “the acquisition of a new skill or occupational advancement” (which includes retraining for new occupations). In this case, employees are clearly asked to accept that it is worth devoting some of their own time to developing their careers by renewing their skills.

It is changes in both the way in which training is managed in enterprises, which is henceforward incorporated into the organisation of work, and in the rules which training has to follow, which have led to the view that training time is no longer a time of absence from work or of approved leave, and is therefore a *de facto* reduction in working hours.

### **Towards a stricter management of training during working time**

This redesignation of training as effectively part of work where it is prescribed or approved by the employer has not come about without a stricter check in return on its costs, and therefore on the time devoted to it. The overall number of hours of training in enterprises has not

fallen but has in fact continued to rise over the years, according to figures published by the Ministry of Labour in the annexes to the Finance Acts. But that is the result of a growth in the number of employees benefiting from training. The average duration of training courses has fallen from 60 hours in the 1980s to less than 40 hours, reflecting an obvious desire to control more rigorously the proportion of working time allotted to training. The upshot has been a stabilisation since 1993 of the total rate of participation in training by enterprises, but a noticeable downward trend, especially among major companies.<sup>13</sup>

This same trend towards reducing the time allocated to training can be seen in the introduction of a training time pool under a 1993 Act. For our purposes it is enough to say that this measure allows, under certain conditions, half the funds set aside for individual training leave to be shifted to the general training scheme. A major consequence of this is a substantial drop in the duration of training courses per beneficiary.

The most remarkable current development in the management of training time is, however, what can be called the notion of co-investment. By this is meant an agreement between an employer and an employee that a training course for which the fee is paid by the enterprise should take place partly in the employee’s leisure time. An industry agreement and a 1991 Act laid down the framework for this. This principle has not been widely applied to date, but the 35-hour Act henceforth provides further encouragement for its wider use. It can be seen, in fact, that some industry and enterprise agreements have explicitly incorporated it: as a counterpart to the reduction in working time, some of the hours released may be devoted to training paid for by the enterprise.

However, agreements signed on reducing working hours which include provisions for co-investment in training frequently bend the law considerably (Besson, 2000; Luttringer 2000). These purely concern the use of the hours released for training, amounting to a ceiling of between 3 and 5 days per annum, and often provide for an equal amount of working time to be devoted to train-

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***“The most remarkable current development in the management of training time is, however, what can be called the notion of co-investment. By this is meant an agreement between an employer and an employee that a training course for which the fee is paid by the enterprise should take place partly during the employee’s leisure time.”***

<sup>(12)</sup> In January 2001 the engineering and mining confederation (Union des industries métallurgiques et minières) submitted to the trade unions the text of a supplementary agreement amending the provisions that infringe the second Act.

<sup>(13)</sup> The average fell from 3.29 in 1993 to 3.24 in 1997, which indicates a fall of 2.8% in enterprises with between 500 and 1,999 employees, and 7.97% in those with 2,000 and more employees, while participation among small enterprises continued to rise (Bentabet, 2000).



***“(...) a different priority [is] the fight against unemployment, particularly among young people. The public supply of training in this area, which is generally provided by private bodies using public funding (...) is not so much a question of encouraging training in leisure time but rather of finding ways to fill empty time under the guise of employment promotion measures.”***

ing; in some cases, however, they merely provide for the employer to cover the cost of training. This is far different from the provisions of the Employment Code (L. 932-1), which restrict the time for training outside working hours to 25% and lay down the condition that the purpose should be occupational skills training leading to priority access to appropriate jobs. This instance too demonstrates the preference given to short training courses over those that take up too much working time.

### **Training in non-working time**

As a result of the heavy emphasis in France on the right to training during working time, there appears to be less interest in education and training during leisure time than in other countries in the European Union. Some commentators see this as the result of irresistible social developments. D. Mothé, for example, states that “nobody has forced anyone. Simply, in order to fill their free time, employees have chosen entertainment products which let them dream rather than products which increase their knowledge and give them the desire to take part in creative activities of a cultural or political nature, or in debates on major philosophical questions”. The INSEE survey on use of time (Dumontier and Pan Ké Shon, 1999) confirms this by showing that, among the employed active population, the average weekly time devoted to study and training outside work is three minutes, and that the participation rate is 2%.

More optimistically, N. Terrot estimates that around 500,000 people have enrolled in so-called “social advancement” courses, generally evening courses, at the CNAM, at schools, colleges and universities, at the National Distance Education Centre, and in centres preparing candidates for civil service examinations. He adds to this figure between 300,000 and 400,000 adult students enrolled in regular university courses. But in the absence of exact research, this number of enrolments may be over-estimated.

I shall limit myself to remarking that training provided in response to individual

demand is regarded as uneconomic, and that training organisations prefer to seek funding for their activities from private companies and public institutions, while the latter are gradually refusing to pay for education and training aiming at social advancement or general culture. The Regional Councils, which have responsibility in this field, seem inclined to forget that there can be no demand for training in leisure time unless there is a supply of training to guide and structure such demand, and unless consideration is given to the costs which arise when individuals take part in a programme of training.

It must also be remembered that the state and the Regional Councils have had a different priority for twenty years, namely the fight against unemployment, particularly among young people. The public supply of training in this area, which is generally provided by private bodies using public funding, has been and remains quite large. But in this case, it is not so much a question of encouraging training in leisure time but rather of finding ways to fill empty time under the guise of employment promotion measures. It may also be thought that some of these training schemes, by meeting employers’ requirements for trained potential recruits, allow enterprises to avoid taking responsibility for some of their training needs. It should be noted also that a person seeking work who attends a training course risks losing unemployment benefit unless the course is approved by government, and such approval is only given if the course is aimed at finding a job.<sup>14</sup> It is only in this case that unemployed persons in receipt of benefit are allowed not to spend all their time trying to find work.

While public funds for training are thus focused on the unemployed, it should be added that they do not benefit those who are in between unemployment and employment, occupying jobs which are temporary or part-time. Although they may be assumed to have more leisure time than other workers, such people have no opportunities to train because there are very few ways of covering the costs of training, they are not well informed, and existing provision is poorly suited to their flexible hours and chance periods in and out of work.

<sup>(14)</sup> More specifically, a job-seeker is still free to pursue personal training of his or her own choice if it lasts for less than 40 hours a month, including evenings.



It is no doubt right to treat with some scepticism the notion that training during leisure time will expand because people will spontaneously recognise the rationale of learning throughout life. The fact that a growing number will be in jobs that are at best temporary, and will have increasingly flexible work patterns as a result of the general adoption of shorter working hours under the 35-hour week, does not mean that people will manage their own time any better, devoting part of it to training. Yet the idea that we have reached a dead end perhaps results from looking at working time and leisure time as two entirely separate entities.

Alain Supiot (1995), in the article where he suggests that working time is part of a broader issue of balancing time, observes that, "leisure time is coming to form part of paid working time" while "paid employment casts its shadow over leisure time." A number of different rights to leave or absence from work have been introduced, which today seem clearly to have been an expression of the attempt to balance working time against private concerns (children's education, caring for friends and family, etc.) and socially legitimate public activities (voluntary associations, politics, etc.). If there is in fact a move towards a realignment of time, the requirements of which are explored in the report *Au-delà de l'emploi* ("Beyond employment") (Supiot, 1999), it would seem indispensable to give greater attention and prominence to the time which is associated with work, not only journeys between home and work, but also time set aside to work at home, and personal time which may be devoted to training.

Can we look forward to a move towards a more coherent treatment of the legal, conventional and regulatory provisions governing the various times associated with work? A. Supiot suggests that it will be necessary to establish "general principles for a harmonious balance between different types of time, which only legislation can determine" before that can happen. Otherwise, the loss of direction which has accompanied the reduction in working hours since the 1980s will continue, according to J.-Y. Boulin (1992), the only aim being to reorganise working time so as to enhance competitiveness.

### **Limitations to the shift from training in working time to training in non-working time**

The general trend towards rationalisation of the costs of training on the part of enterprises, and hence particularly towards tighter control of the working time allotted to training, takes very different forms, and the 35-hour legislation will only accelerate this process. Above all it obliges the social partners in an enterprise to negotiate on what they regard as actual work. It is not only break times that are at issue, but anything which is not directly productive work: preparation time, repair of breakdowns, etc. From this point of view, training, even where imposed by management, represents non-productive work. Training time may no longer be regarded as absence from work, but it is part of the time where cuts have to be made.

Perhaps the solution may be to negotiate a compromise whereby training time is taken from employees' leisure time. However, that idea could only apply to some forms of training and could not be envisaged as a general principle. By its nature, workplace training could not be included. It seems equally questionable to suppose that short compulsory training courses could be taken outside working hours, this time for legal reasons connected with employment law. In the case of updating courses training newly appointed persons to carry out their jobs or supporting technical or organisational change, the second Act on the reduction of working hours has introduced one essential clarification: updating training is in effect part of working time. It may not be given in leisure time.

On the other hand, in at least some enterprises, especially major companies, some of the activities carried out under a training scheme are provided on the basis of voluntary enrolment. This is particularly the case with activities pursued under the training time pool. In such cases, it may well be that an enterprise agreement will lay down rules by which all or some courses take place in the time freed by the reduction in working hours.

*"A number of different rights to leave or absence from work have been introduced, which today seem clearly to have been an expression of the attempt to balance working time against private concerns (...) and socially legitimate public activities (...)."*



***“(...) the increase in leisure time among the active population, because of the general introduction of the 35-hour week and an expansion in voluntary part-time working, is not just another opportunity for employers to find new ways of controlling their employees’ training time. It also presents a challenge to government’s proclaimed intention of promoting lifelong learning..”***

<sup>(15)</sup> The definition of actual work in the previous Act did not make a clear distinction between training courses during working hours and those outside. The Paris district court (Tribunal de grande instance), to which the agreement signed in January 1999 by the French banking confederation was referred, held that the provisions allowing employees to train in the time freed by the reduction in working hours were illegal where the training formed part of a training plan, finding that employees were in such cases still available to their employer (Maggi-Germain, 2000).

<sup>(16)</sup> Jean-Marie Luttringer (1999) remarks that if employers shift training outside actual working time, “they will notice that shifting training into the sphere of private life will take away their power to control training, which is an essential element of their ability to manage.” (Négociier de nouveaux équilibres entre temps de travail et temps de formation (1998, p. 198).

<sup>(17)</sup> J-M Luttringer: “If training is shifted into the private sphere, it will escape collective bargaining and hence the influence of the trade unions. If it remains within the sphere of work, even if its costs are reduced, it will remain subject to collective bargaining. Its nature and legal safeguards will differ from those of actual work, although it will remain in the same sphere. Training will become a kind of sub-system of work, providing benefits like unemployment or health insurance and not paid for by employees”, *ibid.*

<sup>(18)</sup> To counter such a development, the Supiot report (1999) suggests that, in common European policy, “the entitlement to vocational training implies making allowance for training in the regulations governing working time” (p. 129).

In the 35-hour agreements reached under the first Act by Danone, Renault and Peugeot, training credits are to be given to employees, giving them access to training courses organised and funded by the enterprise but pursued in their leisure time.<sup>15</sup>

This particular example does not, however, mean that an employer can require its employees to acquire new skills but to make their own arrangements to pursue the necessary training during their leisure time.<sup>16</sup> Trade unions and works councils would necessarily oppose such a suggestion, which would eventually deprive them of any right of negotiation on an enterprise’s training policy.<sup>17</sup> It can thus be seen that the opportunities for shifting training time to outside working hours are still clearly limited.

One question remains in relation to the link between working time and training time, namely the legitimacy of absence from work for the purpose of training. Can the reduction in working hours justify abandoning the principle of training leave, whether individual training leave, sabbatical leave, or leave for special purposes? This is a real danger, given the considerable decline in the funding of individual training leave. Even if these forms of leave only involve a minority of employees, they constitute rights for workers, and to call them into question would be a definite step backwards, an abdication on the part of government.<sup>18</sup>

## **A policy for training in leisure time**

We certainly have to beware of the temptations which there may be to shift training time from collective working time to individual leisure time. But it would be just as foolish to refuse out of hand all forms of encouragement to pursue training in non-working time, provided that employers continue to accept responsibility for improving the skills of their employees, particularly by funding training, abide by the rule that such training should be voluntary, and recognise the role of representative staff bodies in deciding on the direction and implementation of their training schemes.

However, the increase in leisure time among the active population, because of the general introduction of the 35-hour week and an expansion in voluntary part-time working, is not just another opportunity for employers to find new ways of managing their employees’ training time. It also presents a challenge to government’s proclaimed intention of promoting lifelong learning.

The reasons why the active population seeks training, which vary according to people’s occupational circumstances, the stage they have reached in their careers, their age and their participation in social life, deserve to be examined more closely and become better known if people’s needs and aspirations are to be met. This is too vast a subject to be explored here, but let us say simply that training appears useful and desirable for any activity. This means that it may extend beyond the occupational field but this will remain its chief concern as long as work remains the principal social activity. We like to think today that training for occupational purposes should be seen as part of employment and that it is essentially the responsibility of employers. In so doing we forget that the vocational training aspirations of employees may go well beyond the training imposed or provided within a given enterprise.

Can we, then, rely on the responsibility and perspicacity of the individual so that a demand for training is created to which the market will respond by eventually making appropriate provision? Demand for training does not generally precede supply, through which it is structured and expressed. Central and decentralised government thus has a responsibility for organising, selecting and developing, and hence also for funding, the education and training schemes which may be proposed.

It is the job of government, particularly at regional level, to foster new forms of training which take into account the problems of balancing individuals’ time that arise especially from the increased variety and flexibility of working hours. What makes training attractive and valuable is not only its subject matter and purpose, but also its accessibility, which must take account of constraints of time. Information and communication technologies may



help if proper use is made of them in group teaching.

However, it is not only training provision which should reflect the new way in which time is broken down. The pursuit of training as an activity among the active population also presupposes regulation and management of social time, in which national and local public agencies will play a key role – the former by laying down the principles by which experiments in time management should serve the general interest (Supiot 1999) and the latter by finding how time can be managed coherently at local level (Gauvin and Jacot, 1999).

To sum up, it has to be admitted that the reduction in working hours has not had a noticeable effect among the significant changes which have altered the context of adult education and training over the last 30 years in France. Until now it has not automatically led to a growth in the time which people spend in training on their own account, with the possible exception of job-seekers. On the other hand, the gap between training and work has considerably narrowed, to the point where it is thought reasonable for training to be incorporated in working time. The idea that training time in itself amounts to a reduction in working time is now a thing of the past.

However, training is not productive work: employers now seek to make savings in training time by reducing the proportion of collective work devoted to it, shortening individual courses, and possibly letting more employees benefit from training. However, the demand for rationalisation should not lead to an actual shift from training during working time to training during employees' leisure time. The question of training outside working hours should now concern mainly new investment in individuals' training on their own time.

It is however obvious that any further expansion in training among the active population, particularly outside working hours, will not occur spontaneously through the interplay of supply and demand in the leisure market. This is a challenge for government and social partners alike. What the former will have to do is foster and promote good-quality training which meets the expectations, time constraints and resources of those sections of the population who are in greatest need of it in order to get jobs. Social partners, on the other hand, will have to acknowledge the importance of co-investment in training, with a focus not on reducing cost to employers but rather on encouraging employees to enter into more training projects in agreement with their employers. Such a development would serve the interests of employers, employees and society in general.

This assumes that principles and rules are to be laid down to provide for a right to training time that is applicable in practice; this right must therefore be general, simple and easy to understand and use. Provisions do currently exist, but as they have built up over the years and are specific to particular occupations, they have become complicated to understand. For this reason they are frequently off-putting, so that the people concerned have to turn to specialists who can explain to them the rights to which they are entitled – on condition that they already have a training project in mind. Draft legislation redefining a general individual right to training, which is transferable when people change employer, is still under discussion. It is impossible to predict whether it will be adopted since the social partners seem to prefer to leave the initiative in this area to government rather than to put forward a scheme which allows employees to pursue a training programme by combining working time with their own leisure time, and which includes arrangements for managing work, covering costs, and guaranteeing recognition of the skills acquired.

***“The idea that training time in itself amounts to a reduction in working time is now a thing of the past.”***

***“Draft legislation redefining a general individual right to training, which is transferable when people change employer, is still under discussion.”***



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# Vocational education in the United States: reforms and results



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## Introduction

“In studying foreign systems of education we should not forget that the things outside the schools matter even more than the things inside the schools, and govern and interpret the things inside. We cannot wander at pleasure among the educational systems of the world, like a child strolling through a garden, and pick off a flower from one bush and some leaves from another, and then expect that if we stick what we have gathered into the soil at home, we shall have a living plant. A national system of education is a living thing, the outcome of forgotten struggles and ‘of battles long ago’. It has in it some of the secret workings of national life.”

(Sadler, in: Phillips 1993, p. 15)

One would think that this quote came from the early nineties when there was a vivid discussion on education reform in the United States. Interest in European educational systems, especially the German ‘dual system’, was one common aspect in the debate on the loss of a skilled labour force. However this quote was by Michael Sadler, a member of the English Board of Education from 1895 to 1903. At the end of the 19th century and the beginning of the 20<sup>th</sup>, interest in the German education system was very high, not only in Britain but also in the United States. This interest was influenced by German immigrants who knew the German apprenticeship system and tried to revitalise a structured apprenticeship programme. Supported by employer organisations, unions and representatives of the education system, these efforts resulted in the National Apprenticeship Act of 1937, often called the Fitzgerald Act. After the Second World War there was the

need to integrate veterans into the work force and society. Thus new federal programmes were set up to invest more money in vocational education and new legislation was established to open apprenticeship programmes for adults. Until the early 1970s there was only little interest by policy-makers and researchers in vocational education. However, the growing problem of youth unemployment attracted national interest in vocational education. In 1973 Congress passed the Comprehensive Employment and Training Act (CETA) which was succeeded by the Job Training Partnership Act (JTPA).

The 1983 publication of ‘A Nation at Risk’ focused on the effects of inadequate education of US workers on the nation’s economy and can be seen as the starting point of the current debate on education reform. The proponents of a change in the education system looked to the German and Japanese system where the workplace plays a crucial role in vocational education. After the inauguration of President Clinton his secretary of labor, Robert Reich, endeavoured to establish a comprehensive school-to-work system so as to improve the occupational qualification of young people. His efforts resulted in the School-to-Work Opportunities Act of 1994.

This article examines the history of vocational education in the United States and its impact on recent reforms.

## History of vocational education

Vocational education and training in the United States is a highly fragmented and

**In the early 1990s there was a shift in the attention of the education reform movement in the United States. Because of the economic situation the focus was directed towards vocational training and the connection between education and economic competitiveness. Employers needed a skilled workforce for their restructuring processes. Instead of designing a new job training programme reform-oriented politicians, educators and employers demanded a new systemic approach to the whole complex of vocational education.**



***“Vocational education was first established in private high schools in the second half of the 19th century.(...) However, vocational education played only a minor role in high schools until the beginning of the 1960s.”***

***“(...) two-year colleges (...) focus on occupational qualifications.(...) At the end of the 1970s there were more than four million two-year college students. This success was due to two-year colleges filling the gap between increasing demand for skilled labour and a lack of sufficient apprenticeship programmes.”***

complex system which one can divide into four main areas where it takes place:

- a) high schools
- b) two-year colleges
- c) on-the-job training
- d) apprenticeship

In all of these areas one can find different forms of vocational education regarding the learning situation, specialisation and organisation.

### **High School**

The high school system was set up at the end of the 18th century and the beginning of the 19th century. In the first period the efforts of the colonial states were focused on the establishment of a comprehensive elementary school system. After the Civil War there was a movement to build a system of “free public secondary schools supported by public taxation, publicly controlled, open to all” (Barlow, in: Münch 1989). However, some opposed paying taxes for free public schooling. This opposition was overcome by a decision of the Michigan Supreme Court in 1874.

Vocational education was first established in private high schools in the second half of the 19th century. These schools offered vocational courses like accounting, stenography and machine typing. One could say that the first high schools were set up to prepare their students for a business life. It was only later that the priority shifted to the preparation for college. Nonetheless many high schools retained their business programmes, for example high schools in Boston, Philadelphia, St. Louis, Washington DC and New Haven. After the introduction of compulsory school attendance for older students in many states, the percentage of high school graduates going to college was diminishing. Therefore, the curriculum had to change to take the new situation of a great number of non college-bound graduates into account.

In 1917 Congress passed the Smith-Hughes Act which promoted vocational education in high schools. The federal government offered financial incentives for setting up vocational programmes. Most courses were related to agriculture

and home economics. However, vocational education played only a minor role in high schools until the beginning of the 1960s.

### **Two-year colleges**

One can draw a clear line between four-year and two-year colleges regarding their main purposes. The first has an academic orientation, the latter focuses on occupational qualifications. On the other hand, the distinction between the two institutions is blurred since two-year college students can easily continue their education in a four-year college and get credits for their courses. Therefore, enrolment in a two-year college does not mean that one is committed to end one’s studies after two years.

The development of two-year colleges cannot be distinguished from the history of the American university system. They are only one variant of this system developed from an identical historical process. Their roots can be traced back to the junior colleges which prepared their students for academic studies at university. Thus, the purpose and content of their programmes were directed towards deepening and broadening students’ general education. The Morrill Act 1862 was an important precondition for the establishment of new colleges offering programmes in agricultural and technical studies. In 1900 there were only eight private two-year colleges. The first public junior college was set up in 1902.

During the following years, junior colleges gradually extended their curricula by introducing occupational qualification programmes, whereas the newly established community and technical colleges focused on these programmes right from the beginning. However, there was always a combination of occupational and academic orientation which is mirrored in special transfer courses for students wanting to continue their education. This might be an aspect of the American belief in equality of opportunity where an open system theoretically offers the chance for everyone to develop their individual personality.

The number of students enrolled in two-year colleges increased after Congress



passed the Vocational Education Act 1963 which offered matching funds to improve vocational education programmes in the states. At the end of the 1970s there were more than four million two-year college students. This success was due to two-year colleges filling the gap between increasing demand for skilled labour and a lack of sufficient apprenticeship programmes.

### **On-the-job training**

“Employee training is an amorphous function. It is conducted and managed and accounted for in many different ways, by many different kinds of organizations.” (Feuer, in: Münch 1989) Because this kind of vocational education is done in a highly informal way it is very difficult to classify certain characteristics. Furthermore, due to this diverse structure there is a lack of comprehensive research on this topic.

At the beginning of this century Taylor invented his scientific management approach to organising work, inspired by industrial needs of efficiency and the idea of analysing work into its simplest elements. By organising work in this way industry did not need a broadly skilled labour force, but workers trained in one specific function. Furthermore, the costs for on-the-job training were much lower than the investment in an apprenticeship programme. Therefore, on-the-job training developed out of the industrial organisation of mass production and became the most important kind of initial vocational education for the non college-bound young people.

### **Apprenticeship programmes**

The idea of apprenticeship programmes were brought to the United States by British and German immigrants. During the time of British America, apprenticeship was mandated by the Statute of Artificers of 1563 which stipulated an apprenticeship term of seven years or longer and established guilds to administer and enforce the law. By contrast to the British experience, guilds could never reach the same importance in the American colonies since ongoing immigration, skilled labour scarcity and the rural character of the economy inhibited their full development. The absence of an appropriate institution to regulate apprenticeship pro-

grammes might be one reason for its decline in the United States. Moreover, there was a significant runaway problem in colonial times which intensified after independence. Between 1783 and 1799, 12 states passed new apprenticeship laws focusing on the runaway problem. Despite such measures, the market and institutional environment did not promote apprenticeship programmes because geographic mobility, especially the opportunity of western settlement, and the spread of an ideology of personal liberty made enforcement of indenture commitments more difficult. The laws had no practical impact since they did not apply across the states, thus apprentices could escape by crossing state borders. Additionally, employers showed little interest in legally enforcing an unwilling apprentice to serve out a full term. Therefore, US firms employing apprentices changed the system by introducing special payment schemes with bonds and bonuses ranged from \$100 to \$200. This practice was an alternative means for employers to secure training investments and minimise risk. Furthermore, the new arrangements shifted the investment risks from employer to employee. However, the money was insufficient to deter runaways effectively; “a bonus of one to two hundred dollars at the end of an apprenticeship ...is too far away, and figures out but insignificantly when reduced to the hour basis.” (Becker, in: Elbaum 1989) In addition, the incentive for employers to find an effective solution to the runaway problem was diminished by the fact that the demand for skilled labour could be met by well-trained immigrants. With growing industrialisation the demand for a system of apprenticeship training including both classroom and on-the-job training increased. The Commission on Industrial Education of the National Association of Manufacturers (NAM) recommended such a system in 1910. The large number of German immigrants in Wisconsin led to an early interest in a comprehensive apprenticeship system. In 1911 the Comprehensive Apprenticeship Law was passed, establishing a compulsory trade school attendance. Critics argued that public laws would eliminate existing apprenticeship programmes because employers did not like to be bound by state regulation, and if one looks at the number of apprentices in Wisconsin in 1931, when only 73 ap-

***“(...) on-the-job training developed out of the industrial organisation of mass production and became the most important kind of initial vocational education for the non college-bound young people.”***

***“(...) apprenticeship programmes were brought to the United States by British and German immigrants. (...) guilds could never reach the same importance in the American colonies since ongoing immigration, skilled labour scarcity and the rural character of the economy inhibited their full development. The absence of an appropriate institution to regulate apprenticeship programmes might be one reason for its decline in the United States. Moreover, there was a significant runaway problem (...) which intensified after independence.”***



***“After World War II vocational education and apprenticeship were opened for veterans by passage of new laws. Due to this institutional change the apprenticeship system was gradually transformed from a youth-based into an adult-based training system. According to the US Department of Labor’s Bureau of Apprenticeship, only about 2 million people have completed apprenticeship since 1950.”***

***“In 1983 the National Commission on Excellence in Education published its report ‘A Nation at Risk’, which had a profound influence on the general public regarding education reform (...). While the initial focus of the education reform movement was on secondary education and the traditional American high school with its curriculum preparing students for a college career, attention shifted to vocational education in the early 1990s, when the connection between education and economic competitiveness became clearer.”***

prentices were still employed, they might have been right.

After the First World War the US economy experienced a boom period with growing demand for skilled labour which had to be met by own sources as immigration fell. A coalition of employer organisations, trade unions, representatives of the education system and government agencies forced the federal government to augment efforts to improve vocational education. One result was the National Apprenticeship Act 1937, a model of brevity since the law contains just five paragraphs. The prescribed government role includes the development of apprenticeship standards with industry. These standards relate to equal employment opportunities requirements, wage rates to be paid to apprentices, and ratios of apprentices to journeymen at the worksite. During that period the basic structure of the apprenticeship system shifted from protection of the employer’s investment to protection of the employee. The system was now dominated by trade unions, and for most employers apprenticeship was more costly than its alternatives, not because of training expenditures but the legal obligations to honour contracts while economic circumstances had become unfavourable.

Instead of investing money in apprenticeship programmes employers used public and private trade schools for gaining skilled labour and by doing so transferred the involved investment risks to trainees and the general public. After World War II vocational education and apprenticeship were opened for veterans by passage of new laws. Due to this institutional change the apprenticeship system was gradually transformed from a youth-based into an adult-based training system. According to the US Department of Labor’s Bureau of Apprenticeship, only about 2 million people have completed apprenticeship since 1950.

To categorise the four different strands of vocational education one has to look at their specific learning structure. Vocational education in high schools and two-year colleges is mainly school-based whereas on-the-job training and apprenticeship programmes focus on the workplace. However, work-based learning as part of vocational education pro-

grammes can be found in high school and two-year college courses, even though work-based learning is generally less important than classroom teaching and there are no comprehensive concepts of alternating learning. By contrast, on-the-job training contains no classroom teaching. The apprenticeship system is the approach in which the concept of alternating learning is best established. However, this system remains the smallest form of training in the US.

## **Recent developments in vocational education**

In 1983 the National Commission on Excellence in Education published its report ‘A Nation at Risk’, which had a profound influence on the general public regarding education reform, “Our Nation is at risk. Our once unchallenged pre-eminence in commerce, industry, science, and technological innovation is being overtaken by competitors throughout the world (...) We report to the American people that while we can take justifiable pride in what our schools and colleges have historically accomplished and contributed to the United States and the well-being of its people, the educational foundations of our society are presently being eroded by a rising tide of mediocrity that threatens our very future as a Nation and a people. What was unimaginable a generation ago has begun to occur - others are matching and surpassing our educational attainments.”

While the initial focus of the education reform movement was on secondary education and the traditional American high school with its curriculum preparing students for a college career, attention shifted to vocational education in the early 1990s, when the connection between education and economic competitiveness became clearer. Employers argued that the school system failed to provide high school graduates with the skills needed for the workplace. The underlying argument was that business needs flexible workers with analytical and basic skills to remain competitive. Moreover, there was a change in the attitude to education reform, namely, a growing demand for a new systematic approach instead of adding a new job training programme to the existing bundle.



In searching for a systems model, reformers looked to the education systems of their economic competitors, especially Germany. "Just as Germany had been held up as the 'best model' at the beginning of this century it once again became the primary standard bearer for possible replication in the United States." (Wills, 1997) The German 'dual system' with its integration of work-based and school-based learning seemed to provide the German economy with a pool of high-skilled workers. The concept of institutional linkage between school and workplace was seen to be the solution so as to motivate non college-bound young people to stay in school and hence decrease the drop-out rate. Furthermore, the alternating approach to learning should enhance the maturity of the students by exposing them to the 'real world of work'. However, the question is whether the institutions, or maybe the culture for establishing such a formalised vocational education system as the German 'dual system', can be developed in the United States. Referring to Sadler and his quote at the turn of this century one should not forget, that "in studying foreign systems of education... the things outside the schools matter even more than the things inside the schools..." (Phillips, 1993).

The German 'dual system' is based on a set of unique features: centralised employer associations and unions, mandate of the federal government to regulate vocational education, existence of mandatory training standards, and a consensus on the need of a high-quality training system among all stakeholders. The US lacks all of these features, except the last one, although the consensus is more about the need for a skilled labour force rather than the way to achieve it. Probably the key problem in establishing a comprehensive system is the non-existence of a mandate of the US federal government regarding vocational education. By contrast, the German federal government assumed responsibility for the company training of apprenticeships in 1969. In the US all states have constitutional authority to fund and provide education in cooperation with the local communities. The federal government can set policy for the states to follow, but states have tremendous flexibility in operating programmes.

### **School-to-Work Opportunities Act 1994**

The same idea is mirrored in the School-to-Work Opportunities Act 1994, the latest attempt to establish a comprehensive training system as part of a work force development strategy. This federal legislation was supplemented by two other major laws: Goals 2000: Educate America Act and National Skills Standard Act. The key linkage between a strategy of changing the system and different institutions at federal, state and local levels was the development of skill and academic standards. Those standards should ensure quality, indicate goals and promote change. Standards so important in a decentralised system because they can build on the respective strength of all institutions - public and private - engaged in the education and training system and combine different efforts to achieve a common outcome. Moreover, a system of skill standards is the basis for portable credentials recognised by employers. To facilitate employer recognition, however, skill standards have to be nationally mandatory to ensure that a certificate from California can be equally compared with one from Maine. If skill standards are voluntary and each state can set up its own, employers cannot easily compare different state credentials and hence will only partially take training credentials into consideration in their decision to hire a person. This would diminish the value of further education and vocational training. However, that is only important for interstate labour mobility since a state-centred system of skill standards could provide security for employers' recruitment decisions within the state and the local community.

To establish portable, industry-recognised credentials all the different stakeholders, like employer associations, trade unions, education institutions, and governmental agencies have to take part in this process. The National Skill Standards Act established a National Skill Standards Board (NSSB) to construct a voluntary system of skill standards effecting all institutions concerned with worker skills. Firstly the board had to identify broad occupational clusters where skill standards could be adopted. The major problem of the NSSB is that it does not

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***“Despite the fact that skill standards have a critical role in changing the system, the constitutional authority of the states regarding education makes it difficult to establish a nationwide system of skill standards (...)”***

***“The National Skill Standards Act is to supplement the School-to-Work Opportunities Act that establishes a framework based on three main components within which each state can develop its own school-to-work transition programme that is best suited to its local needs. These components are: school-based learning, work-based learning and activities that connect both concepts to a comprehensive strategy for all students, not just those in vocational education.”***

have the authority to issue mandatory skill standards, but only recommendations which can be used by institutions of higher education, employers, trade associations and trade unions.

Despite the fact that skill standards have a critical role in changing the system, the constitutional authority of the states regarding education makes it difficult to establish a nationwide system of skill standards which allows employers to use recognised credentials as a key element in the recruitment decision process and provide an incentive for young people to obtain them.

Without portable, recognised credentials there is no incentive for many high school drop-outs to continue education and get some kind of skill certificate as often it does not increase their employability. “Employers rarely consider the high school records of applicants (...) And high school students’ awareness that they will end up initially in the same type of jobs (often the same job) that they have had before graduation stifles incentives to work hard in school.” (Bailey, 1995a).

#### **National Skill Standards Act**

The National Skill Standards Act is to supplement the School-to-Work Opportunities Act that establishes a framework based on three main components within which each state can develop its own school-to-work transition programme that is best suited to its local needs. These components are: school-based learning, work-based learning and activities that connect both concepts to a comprehensive strategy for all students, not just those in vocational education. Due to the broad definition of how the programmes should be designed this legislation is not to establish one ‘best practice’, but rather promotes a variety of different school-to-work approaches, for example tech-prep programmes, cooperative education, and youth apprenticeship. All of these programmes link academic and vocational content, and sometimes secondary and post-secondary education. New cooperation between high schools and community colleges is to be encouraged to promote continuing learning. Furthermore, the idea of work-based learning forces schools to seek links with employers to

set up planned workplace training. This gives students the chance to build a relationship with an employer and motivates them to stay in school since they perceive the importance of academic learning for the workplace. The risk of dropping out of high school is further reduced by offering a recognised credential that improves the employability.

#### **Barriers to change**

However, what are the barriers that impede a systemic change? What are the weaknesses of the School-to-Work Act? There are three major institutional components which have an impact on education reform, especially vocational training. Firstly, employer and trade union cooperation is crucial for the implementation and success of new training programmes and change in the education system. Second, government institutions and the relation of federal, state and local authorities determine the administration and organisation of training programmes. Finally, teachers and parents influence the practice of education programmes, for example courses offered, teaching and student participation.

To establish a large scale school-to-work system, the participation of a majority of employers is a key factor for success since employers have to offer workplace training places for a large number of high school students. There are three incentives for an employer to take part in such a training system: philanthropic, individual and collective motivation. A philanthropic motivation implies employers provide training places because they see it as a commitment to helping their communities and as a corporate responsibility. Despite its importance at an early stage of employer involvement, a purely philanthropic motivation would not be adequate to sustain a large and intense work-based education system. Employer participation in work-based training programmes might be driven by an individual motivation since employers could benefit from better public relations, a source of low-cost labour and future recruitment. Public relations benefits can be achieved with a small number of placements which do not necessarily require well established training arrangements. The special wage for participat-



ing students might be an important incentive for smaller businesses to fill part-time positions with students instead of employing a higher paid adult worker. Some US employers said they saw school-to-work programmes as “a good way to get good, lower-paid part-time help.” (Lynn/Wills, in: Bailey, 1995b) However, in youth apprenticeships which require much more employer involvement than other cooperative education programmes, the high supervisory cost for apprentices is a greater barrier to participation than the cost of the trainee wages. Therefore, the significance of supervisory costs cannot be overestimated for the establishment of professional workplace training places.

The third motivation for an employer to participate in work-based education is the opportunity to recruit future workers. Certain features of the US youth labour market, such as the high turnover among young workers, discourage employers to invest in training for students. In addition, since the school-to-work programmes should avoid establishing a tracking-system where good students prepare for college and less successful students join vocational programmes, employers do not have a guarantee that trained students will stay in the firm and not continue further education at a college. Moreover, employers have different options for recruiting and screening applicants and thus do not rely on work-based education in this respect.

Finally, the common argument for reforming the education system is the lack of skilled workers. It is in the interest of industries to promote the development of a skilled labour force. Whereas individual employers are reluctant to invest in training of young people, this could be the area of a collective action. However, there has to be an appropriate institutional framework through which collective interests can be articulated and regulated. Otherwise, individual firms could benefit from a pool of qualified skilled workers even if they did not participate in the system. Therefore each collective action has to overcome the ‘free rider’ problem. As in the German apprenticeship system one needs to have strong intermediary organisations to force individual firms to take part in training programmes.

To sum up, strong employer participation in a large scale school-to-work system cannot be attained since neither individual nor collective motivation can overcome the problems of training cost - especially supervisory costs, ‘free rider’ behaviour and the lack of an institutional framework to regulate collective interests. Furthermore, employers can fall back on alternative options to solve their skilled labour demand by employing trained adult workers and upgrading the skills of their employees.

A second impediment to establishing a large scale school-to-work system is the reserved position of trade unions. They are concerned with the employment effects of work-based education systems. Especially in industries with declining or stagnant employment, providing work placements for young people may seem to threaten adult jobs. Furthermore, the development of widespread youth apprenticeship programmes could undermine the apprenticeship programmes run by unions, especially in the construction industry. Those programmes are dominated and controlled by unions which use them to monopolise the labour market of skilled workers. In addition, the average age of apprentices in union apprenticeship programmes is around 26 years, so this is not a school-to-work system since they were usually employed before.

The third difficulty in establishing a large scale school-to-work system is the role of the different governmental levels: federal, state and local. The School-to-Work Opportunities Act mandates the states to develop and implement such an education system. Here, the states can customise a system to their regional and local needs since there are only broad criteria set up in the legislation. Thus, the dominant actor behind the programmes is the states which build on their earlier efforts of providing training and education opportunities for non college-bound youth. By doing so, they keep the school-to-work system highly fragmented and reduce the chance of building a coherent work-based education system. Furthermore, the size of the federal funds for school-to-work programmes is much too small to achieve a nationwide change in the education system. In 1995, 27 states received a total of \$204 million in implementation grants

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***“Finally, the last group that has an important impact on education reforms is the teachers. (...) To establish a comprehensive and high-quality school-to-work system teachers have to be willing to work with companies and build a partnership between school and business, classroom and work-based learning.”***

compared to a total of around \$4 billion for other federal youth training programmes. Those millions of federal dollars have established a powerful political constituency that cannot be overthrown ‘overnight’. As the School-to-Work Opportunities Act ends in 2001, there is the question of whether implemented school-to-work programmes can be sustained without federal grants beyond that date.

Finally, the last group that has an important impact on education reforms is the teachers. They are the ‘street-level bureaucrats’ implementing new policies. However, their discretion allows them to oppose or even change the idea of a new policy. To establish a comprehensive and high-quality school-to-work system teachers have to be willing to work with companies and build a partnership between school and business, classroom and work-based learning. Staff development must be an important feature of school-to-work programmes. Teachers have to be educated in ‘new’ methods of teaching by integrating vocational and academic subjects. There might be an opposition of some teachers who view vocational education as an option for low-achieving students and who focus on college preparation as the only option of further education. In addition, cooperation between academic and vocational teachers to integrate their specific curricula into a single work- and school-based curriculum might be problematic since the different groups of teachers have not worked together and developed their own occupational status.

Academic teachers involved in college preparation are supported by some parents, especially middle-class ones, for whom vocational education has a low social prestige and who want their children prepared for a college career. Since high school vocational education courses are often preferred by low-achieving and minorities’ students, vocational education leads to a high school diploma which does not increase employability and is usually viewed as a minor high school diploma.

There is some resistance of parents who see school-to-work as an instrument of the federal government to intervene into their parents’ rights and to limit personal freedom by ‘totalitarian’ state coercion.

“But many parents are angry about these efforts and the \$2.3 billion Federal plan that helps support them. Instead of focusing on students in vocational education, these parents point out, school-to-work programs, by law, include *all* students. And in practice, the programs assume unwarranted authority over their children’s lives.” (Cheney, 1998) All government intervention into education is viewed as a threat to the American dream of equality of opportunity, although this is a fiction in reality every attempt to reform the education system which might establish a formalised ‘tracking system’ will meet strong opposition.

## Conclusion

In the early 1990s there was a shift in the attention of the education reform movement. Because of the economic situation the focus was directed towards vocational training and the connection between education and economic competitiveness. Employers needed a skilled workforce for their restructuring processes. Instead of designing a new job training programme reform-oriented politicians, educators and employers demanded a new systemic approach to the whole complex of vocational education. They looked to the German education system since Germany is a main economic competitor. The German ‘dual system’ of vocational training combines work-based and school-based learning in a highly structured way. It is embedded in an institutional setting where centralised employer associations and unions work together with the federal government which has a legislative mandate to regulate vocational training. As all of these institutional preconditions are missing in the US it was obvious that one could not replicate the German system of vocational training. Therefore, the School-to-Work Opportunities Act 1994 was designed to take the specific conditions in the US into account and open the way for state-centred solutions. In this regard the School-to-Work Opportunities Act follows the tradition of education policy in the US.

While the latest attempt to establish one vocational training system has failed, the openness of the School-to-Work Opportunities Act implies a great chance for the



US to have many different regional and local models of vocational training. By having different approaches to vocational training they can learn from each other and adapt the various ideas to their local needs. Tech-prep is a very good example for adjusting the traditional school-based vocational education to the changing conditions of a globalised economy. By combining high school and community col-

lege courses students are prepared to satisfy the growing demand for a broader knowledge base and problem-solving qualifications. Since the economy is becoming ever more fragmented and the cycle of technological change is shortened, the idea of a single vocational training system might be overhauled and flexible solutions within a general framework might be a more appropriate approach.

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# Developing transnational placements as a didactic tool

**Transnational placements are increasingly being used in vocational training courses to foster the acquisition of foreign language proficiency, intercultural competence, personal (key) skills as well as specific vocational skills. As a didactic tool, however, it is still in its infancy. Further research and development activities are needed in order to ensure the quality of the learning process and to increase the sophistication of the tool for diverse target groups. The present article tries to give an overview of the “state of the art” and to indicate pathways for future action in the field.**

## Introduction

The use of transnational mobility in the context of vocational education and training (VET) is a widespread phenomenon in all EU Member States. Moreover, it is growing rapidly due to a large extent to funding made available over the past 10 years through the European programmes and the regional and social funds. Under the Leonardo da Vinci II programme (2000-06), the total number of young people (and trainers) expected to participate in programme-funded mobility activities is 230,000 - an increase of 100,000 in comparison with the first programme (1995-99).

In addition to the European programmes there is a great variety of mobility programmes that operate through funding at national, bi-national or even regional level. Examples of these are the activities of the Franco-German Youth Office, the Swedish InterPraktik-programme, the Danish PIU-programme and the Dutch “Onbegrensd Talent”-initiative. At the present time there is no precise overview of the total numbers involved at European level, but a well-informed estimate indicates that around 200,000 people annually participate in transnational mobility schemes in a VET context. This figure does not include young people who organise a stay abroad in a VET-context on their own initiative, funded by themselves, by their training centres and/or local grants. The overwhelming majority of these mobility activities are carried out as placements in public or private companies.

In a previous article in the European Journal on “Mobility as a learning process”,

(April 1999), the form and purpose of this type of mobility was described more in detail and contrasted with other forms of (transnational) mobility. In summary, the article identified four different discourses on the reason for mobility in the context of VET: the discourse on mobility for labour market purposes; the discourse on mobility as a means for the promotion of intercultural understanding; the discourse on mobility as a vehicle for the transfer of technology; and finally the one that is pertinent in this context, namely the discourse on mobility as a learning process. It demonstrated how transnational mobility projects are used in the context of VET to promote the acquisition of two specific sets of skills, which may be referred to as international skills (foreign language and intercultural skills) and personal skills (entrepreneurial skills, interpersonal skills, communicative skills etc.). Many transnational placement projects also have as an aim the acquisition of particular vocational skills not available in the home country. This article seeks to develop further the notion of the learning process in transnational mobility (placement) projects, with special emphasis on the translation of these into didactic practices.

## Mobility as a timely phenomenon

The use of transnational mobility in the context of VET is a fairly recent occurrence heralded on the European scene with the creation of the Petra II-programme (1992-95). The emergence of transnational mobility as a didactic tool especially at this junction in time may be explained by globalisation and the rapid



development of technology. “Globalisation” denotes an increase in import/export-relations, constant acquisitions, mergers and joint ventures across borders, and the expansion in to international markets. This is a reality that affects most companies, and consequently the competences they demand of the labour force. Foreign language skills are necessary for an increasing number of employees, as is the ability to interact constructively with people of another cultural background, on the basis of a perception of differences in attitudes and values (intercultural competence). The accelerating rate of change in technology means technical skills may become rapidly obsolete, which in turn places more emphasis on the so-called “personal skills”, i.e those not linked to any particular profession or work organisation, but which can be applied in any (vocational) context. For this reason, these skills are also known as “transversal skills” (or “key skills”, “generic skills” or “boundary crossing skills”).

### **“Immersion” and “responsibilisation”**

Such elusive concepts as intercultural and personal skills are difficult to “teach” in the traditional sense, in a classroom setting with an omniscient teacher lecturing from a podium to a class of pupils. Rather, they have to be learned within a framework especially conducive towards their acquisition. There is not a great deal of knowledge on how this takes place within the learning framework of a transnational mobility project. At a general level, however, it has been suggested that they are mediated through two different processes, which we may call immersion and responsibilisation (Kristensen, 2001). The first is defined as the degree of proximity to and interaction with another culture and mentality. In essence this means the more the participant is exposed to the foreign environment, the more he is likely to acquire in terms of foreign language skills and intercultural competence. If he, conversely, stays mostly with his fellow countrymen and is not properly integrated in the work processes at the company in which he is doing his placement, his learning outcome will be limited. The second process - responsibilisation - denotes the

space is available to the participant for autonomous decision making. This is, of course, not a process specific to transnational placements. Transnationality is used here to create some specific conditions that may be difficult to reproduce in the usual surroundings of the trainee. For many participants, the placement will be the first time they are away from their own environment. They will not have their usual network of family, friends and teachers to give instruction and examples on how to solve the many smaller or larger problems of everyday life their placement presents. They will have to devise ways and means of doing this themselves. At the same time, many of the challenges have cultural causes and are of a nature where they cannot draw on past models for their solution. On the other hand, the fact that he is alone in this new environment also means that he can act in an atmosphere where he is free from the expectations of others and can experiment with aspects of his personality that are normally not activated. In this process he will become adaptable, enterprising, open to new influences etc.

It may be argued that the two processes are in fact one, as immersion into work processes in many cases will entail responsibilisation. It is possible, however, to imagine one without the other - to have immersion without responsibilisation (or with only limited responsibilisation) and vice versa. For the placement organiser planning a project, it is helpful to consider both these processes separately.

### **Distinctive features of mobility projects**

The twin processes of immersion and responsibilisation are at work both in the context of the work placement and outside. Joining a football club and negotiating with the landlord about a broken window may be actions which, for all their simplicity, provide important contributions to the learning process. But there is no doubt that it is the workplace, where the participant spends 7-8 hours or more 5 days a week, that constitutes the main arena of learning. The main distinguishing feature of transnational work place-

***“The emergence of transnational mobility as a didactic tool especially at this junction in time may be explained by globalisation and the rapid development of technology.”***



***“There is at present no theory concerned expressly with the learning process in transnational placement projects. The theme does, however, have a lot in common with theories that deal with ‘the workplace as a field of learning’, despite the fact that none specifically take into account transnationality.”***

ments vis-à-vis other types of placements is, of course, their transnationality: the fact that the activity takes place in a different geographical, cultural, and linguistic context. Moreover, in comparison with most other work placement models (in particular the traditional apprenticeship model), transnational placements are, with some notable exceptions, limited in time. Statistics for the Leonardo da Vinci programme show clearly that most placements last 3-4 weeks only. Placement organisers give various reasons for this, but for young people in initial vocational training the most frequently cited is the difficulties of having projects longer than this recognised by the competent authorities (ministries, chambers of commerce or industry etc.) as an integral part of the training curriculum.

Whatever the reason, this short duration means every day counts in the placement, and there is very little time for the participant - and the host company - to adapt and integrate.

A second complication of the transnational context is that the host company is under no legal obligation to give the participant the required amount of training, since the education laws of the sending country are not applicable in the host country. Even though it is usual to conclude “contracts” and “training agreements”, these cannot be legally enforced and the delivery of training is entirely up to the goodwill of the host company.

Thirdly, differences between VET systems and traditions of the sending and host countries in most cases mean the absence of a shared framework of reference for the learning process between host company and trainee/placement organiser. The host company will have very little idea of the formal and informal competences of the trainee or his training requirements, and the lack of a common conceptual basis makes it difficult for the trainee/project organiser to explain this. Finally, one very strong incentive for the host company to provide training - namely that the trainee may later return and work for the company if both parties deem the placement successful - is only rarely present in transnational projects, where the participant returns to his country of origin after completing the project.

## **Placements as “legitimate peripheral participation”**

There is at present no theory concerned expressly with the learning process in transnational placement projects. The theme does, however, have a lot in common with theories that deal with “the workplace as a field of learning”, despite the fact that none specifically take into account transnationality. Some can, however, offer new perspectives and insights when applied to this context.

Of particular interest are the theories of Jean Lave and Etienne Wenger (1999) about “situated learning” (i.e. learning in the context of the workplace) as an act of “legitimate peripheral participation”, stressing the quintessentially social character of this type of learning process.

It makes a lot of sense to stress the social aspects of learning in transnational placements rather than the cognitive processes, as learning occurs primarily in the interaction with others in the host company. Through involvement in work processes (“participation”), the trainee gradually moves from a position at the rim of the circle (“peripheral”) towards a position closer to the centre as learning develops through association with more skilled colleagues (whom Lave and Wenger call “the community of practice”) and is entrusted with more demanding tasks. The word “legitimate” denotes the general acceptance of his position as a learner by the community of practice, and their willingness to integrate him into the learning processes.

The concept of learning at the workplace as “legitimate peripheral participation” is a fruitful one to apply to the context of transnational placements, in that it allows us to pinpoint the dangers to the learning process. A trainee on a transnational placement will *a priori* always be in a peripheral position as his personal, cultural and professional background is different from that of his peer group from the host country. Thus there is always a very real risk that the trainee will stay on the periphery - either because there is too big a mismatch between the skills of the trainee and those required by the placement, or because the community of practice does



not accept his position as a learner (in other words, his “legitimacy”), or both. In that sense, “legitimate peripheral participation” becomes a synonym for the twin processes of “immersion” (i.e. participation) and “responsibilisation” (i.e. the legitimacy of the learner and the gradual movement from the periphery towards the centre and to a better integration in work processes).

Lave and Wenger’s work on situated learning as legitimate peripheral participation in communities of practice was developed to describe apprenticeship learning, and is well suited to young people in initial vocational training. There are other aspects of transnational placements, however, which it does not take into account.

## The “connective model” of work experience

A recent project under the aegis of the EU fourth framework programme for Targeted Socio-Economic Research (TSER) was concerned with the theme of “work experience”. “Work experience” is in many ways an apt description for what goes on in a transnational placement, as the term encapsulates the temporal aspect (the limited duration) and the “one-off” character of the event. Setting up a typology of work experience according to purposes, the authors of the report describe a “connective model” which holds some interesting perspectives for transnational placement projects as it is especially concerned with the development of transversal skills. In summary, the connective model sees the work placement neither in terms of the training course of the participant, nor of the immediate needs of the company. The placement is described as a negotiated piece of “resituated learning”, where the two parties define and develop a “shared object” which may originate outside of the context of company needs and the learning requirements of the trainees as defined in the curriculum.

Transposed to real-life situations, this represents an approach that experienced placement organisers have been using to identify high-quality transnational placements. Their focus is on identifying and/

## Negotiating learning in placement projects

Within the framework of the Leonardo da Vinci pilot project (DK/981/59005/pI/I.1.1.a./FPI) “Quality assurance and certification of work placements abroad” a methodology for facilitating the negotiation of training in a transnational work placement was developed. When negotiating the placement, a three-step procedure is involved; each of which is supported by specific information material in the shape of leaflets. The first leaflet gives the general conditions for the placement: remuneration, working hours, health and safety, industrial injuries’ insurance etc., all of the practical conditions that must be fulfilled to comply with legal and administrative obligations. The second explains the background for the placement: which part of the VET-system the trainee comes from, the overall aim of the placement, and the types of tasks and the level of responsibility expected, and a general description of the relevant sector. The third leaflet contains a long list of all the practical tasks involved in the profession the young person is training in. The host company must tick off the tasks they can offer during the placement, and (in certain cases) at what level. This list serves both as information, as a basis for the negotiation of the training contents of the placement, and as an instrument for recognising it as an integral part of the curriculum of the trainee. The host company must subsequently sign a contract on the basis of this agreement.

The project involved partners from Denmark, Germany, France and the UK.

or developing, in partnership with the host company, a framework for learning in the shape of one or more joint projects (or “shared objects”) - tasks that the trainee can do and which are of relevance to the company. Projects that are unilaterally defined on the basis of the learning requirements of the trainee are seldom acceptable to the company, and projects defined unilaterally on the basis of the immediate needs of the company (using trainees as “cheap labour”) are seldom acceptable to project organisers. Failure to negotiate the content of the learning process will in most cases have grave consequences for the learning outcome, due to the absence of a common conceptual framework between the host company from one country and the project organiser/trainee from the other. Neither will know what to expect from the other, and the processes of immersion and responsibilisation are impaired.

## A typology according to target groups

As a didactic activity, transnational mobility projects vary considerably in length, target group, host country, whether they are organised for groups or individuals

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*“Another characteristic of transnational mobility is that the learning process cannot be controlled through daily interaction in a classroom or the regulated environment in a workshop in a company in the host country. The participant must, to a large extent, assume responsibility for his own learning process (...)”*

etc. This has implications both for the evaluation methodologies and the nature of the learning process. To come to grips with this, it is helpful to try and make some kind of distinction between them. In the context of the learning process, the most obvious one is a division according to pedagogical aim, i.e. the type of skills acquisition that carries most weight in a specific project.

The most straightforward projects are those with a clear vocational aim. Examples are the many projects where participants learn about specific technologies or working methods that do not exist at national level. Other examples are afforded by projects that target people who have become unemployed recently as a result of structural changes in the labour market. These projects seek to equip participants with very precise skills (defined individually) of an international or vocational nature, to help them find new employment and a transnational placement is integrated in the process as a tool to acquire them. Quite a few of these placements can be found in the context of the European Social Fund and its Community initiatives (Adapt, Youthstart etc.). In both cases it is possible to assess the impact of the placement in a relatively short period of time after the return, as the results can be measured in either employment or improvement in working situation.

Another type of project involves disadvantaged groups of (young) people. The term “disadvantaged” is very flexible, but in this context concerns social disadvantage and/or educational shortcomings. Here we are faced with a completely different type of pedagogy and success criteria, where concrete results in terms of employment are very difficult to realise in the short and medium term. The benefits of this form of mobility are mainly psychological. Firstly, by spending time in another country and surviving, the participant is encouraged to break other barriers he is surrounded with. He discovers new strengths and possibilities, and is encouraged to improve his situation at home. Secondly, he is placed in an environment which is not predisposed negatively towards him. He can start with a “clean slate” and has a possibility to re-define himself and develop other aspects of his personality or vocational orienta-

tion. The placement project becomes the start of a process that may take many years to accomplish.

Finally, there is a large group of projects involving a variety of target groups where the placement primarily serves to develop skills not included or insufficiently covered in the curriculum of the VET-course the participant is (or has been) attending. The main aim here is to develop the linguistic, intercultural and personal skills of the participant as “additional” qualifications (“Zusatzqualifikationen”) to those acquired (or will be acquired) in the set curriculum.

### **Preparation and debriefing of participants**

Another characteristic of transnational mobility is that the learning process cannot be controlled through daily interaction in a classroom or the regulated environment in a workshop in a company in the host country. The participant must, to a large extent, assume responsibility for his own learning process and to this end, must be adequately equipped to tackle and overcome the challenges encountered during and after the placement. A transnational placement project, therefore, is more than the placement period. It also contains briefing (preparation) and debriefing. These are, or should be, integral to any project and constitute important quality indicators. The preparation process itself encompasses three phases: motivation (particularly important for those groups to whom a transnational experience does not suggest itself immediately), selection (for a good match between the challenges in the project and the personalities of the participants), and finally the actual preparation.

This last phase consists of 5 elements: linguistic, cultural, vocational, practical and personal/psychological preparation. Whereas linguistic, cultural and practical preparation (travel, social security, accommodation, dealing with authorities etc.) are self-evident, many projects seem to neglect vocational preparation. Vocational preparation consists of raising the awareness of the participant of the differences in training courses and work organisation in the chosen vocational field between home and host country. A bricklayer in



Denmark, for instance, is trained to do other things than a bricklayer in the UK, and a bricklayer in Germany organises his work differently than a bricklayer in Greece. Such information is important for the proper integration in the placement and to avoid frustration. The personal/psychological preparation is intended to help the participant cope with crises experienced by nearly all in a transnational mobility project: loneliness, inadequacy, homesickness etc.

Debriefing of participants in a mobility project may assume many forms and can take place either in groups or individually, written or orally. The important thing is to give participants the possibility to formulate and discuss their experiences with others, to put things in perspective and clear up misunderstandings. Guidance and counselling on how participants can capitalise on their new competences are also an integral part of this.

## The art and skill of project engineering

Although there are no indications of the number of trainees that find a work placement for themselves without a placement organiser, their number is in all likelihood very limited and a placement organiser figures in practically all contexts. The placement organiser is, in most cases, the vocational school or training centre, although private placement organisations, enterprises, and the social partners are seen in this role. If the trainee is placed at one end of the spectrum, and the host company at the other, the placement organiser occupies a position somewhere in between - usually, however, closer to the trainee than the host company and plays a crucial role. The placement organiser need not have in-depth knowledge of learning theories, but must have a firm grasp of the practical issues involved in creating the proper learning environment in a placement - in other words, skilled in project engineering.

The foremost requirement of a placement organiser is to find host companies and negotiate worthwhile placements for trainees. This is by no means easy. In long-term placement projects, the trainee and

host company will often have time to reach some form of mutual understanding of learning requirements and their interaction with the environment in the company, but often only after several months of painful adaptation and missed learning opportunities. In short-term placement projects, the time for such a process of adaptation and *rapprochement* is simply not available. Here the role of the placement organiser as the mediator (as implied in the "connective" model described above) of the trainee on the one side, and the opportunities and the needs of the host company on the other, is crucial. The project organiser must be able to carry out (or at least organise) the necessary preparation and debriefing of the participants. Three more distinct areas of expertise also come under the heading of project engineering, funding, partner funding and handling, and managing practicalities.

Funding usually involves transnational (European) and national perspectives. In many Member States, European programmes are the only source of external funding. Others have their own programmes that either provide full funding or national co-finance for European programmes. Many projects report inordinate amounts of time spent on finding the necessary funding for the activity (complicated application procedures etc.); and, once secured, of much time being spent putting together the necessary financial reports afterwards.

Partner finding and handling is central to mobility projects. Although some placement projects do not operate with one central partner and deal directly with host companies, most are organised in a partnership involving organisations in sending and hosting countries. In most cases, both partners are vocational schools or training centres, but there are also organisations specialised in mobility projects for various target groups (notably young workers) operating independently or in partnership with training organisations. Some operate at a commercial level. Many projects encounter problems in identifying a suitable partner and developing the project together. Cultural differences run very deep and are reflected in management styles and misunderstandings easily occur. Other

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## Implementing quality control and supporting host companies

The PEGASE-project, a 1996 Leonardo da Vinci Pilot project (F/96/1/05350/PI/I.1.1.a/FPI) developed a comprehensive system of quality control for the preparation, supervision and evaluation of transnational placements. The system addresses itself to all involved actors (i.e. the trainee him- or herself, the project organiser, public authorities **and** the host company). The project defined and analysed all steps in a placement projects and developed material that could accompany and support these for each type of actor. When implemented, the system allows each actor to know exactly what to expect from the others, and when to expect it. Also, comprehensive checklists identify the various tasks to be performed as well as the appropriate time for performing them. The use of ICT-tools makes it possible to monitor the placements ongoingly and to detect problems early on. The methodology ensures that it is possible to explain to companies exactly what it implies to accept a trainee from abroad, and to give them material that in a systematic and simple way underpins the administrative procedures.

The project involved partners from Germany, France, Ireland, the UK and Hungary.

## Role of host companies

Enterprises play a crucial role in transnational placement projects by providing the physical location and vocational environment for the learning process of the trainees. They also form a serious bottleneck in the process, as the difficulty of finding of good quality host enterprises is seen as the most formidable obstacle to the expansion of transnational placement schemes. It is curious, given this important role, that little is known about companies and their reasons for accepting trainees from abroad. Which type of companies accept trainees? Are they large companies? Multinational companies? Companies with very strong import/export relations? Are there certain sectors particularly propitious for placement seekers? Is it goodwill, altruism or a belief in the European idea that provides the impetus for accepting a trainee? Are there tangible or intangible benefits for the company? What are they? Is it merely a wish to obtain cheap (and in some cases even free) labour? In the process of negotiating the content of transnational placements, it would be very helpful to have information on what "makes the company tick" when they agree to accept trainees from abroad so that adequate strategies can be developed. Similarly, there is only anecdotal information on why companies refuse to take trainees. Some companies, which would otherwise be positive towards receiving a young person from abroad, might refuse because they are unsure of what this might entail in terms of time-consuming monitoring and other obligations. What does the role of "mentor" mentioned in the Europass<sup>1</sup>, actually imply?

Research and development projects on aspects of the learning process seen from the perspective of the host company (as opposed to the trainee or placement organiser) are few and far between. Recently, national guides for companies accepting trainees from abroad have appeared in two countries (Austria and Denmark). These focus mainly on aspects of law and social security, but are much appreciated by companies and have helped clear many uncertainties and misunderstandings.

***"Research and development projects on aspects of the learning process seen from the perspective of the host company (as opposed to the trainee or placement organiser) are few and far between."***

problems have linguistic causes. The process of finding a partner and developing the partnership is a valuable learning process for many project organisers, but should not overshadow the "core business" of the activity - namely the learning process of the participants. Analyses of successful projects often reveal they are carried out in partnerships where placement activities are either reciprocal (i.e. both partners both host and send) or in partnerships that have served as the framework for several projects, and where the partners have developed a mutual knowledge and trust.

Managing practicalities can take up a lot of time for a project organiser, especially in dealing directly with host companies or where the partner plays a limited role. Even where issues like the provision of accommodation and work placements have been taken care of by the partner, the project organiser must still possess a good knowledge of these fields in the conception and planning phase of the project. The project organiser should also be aware of the administrative implications arising in connection with work and residence, in particular with respect to social security, as young people on (unpaid) placements often are not covered against industrial injuries, due to the lack of a properly defined legal status.

(<sup>1</sup>) Council Decision of 21 December 1998 on the promotion of European pathways in work-linked training, including apprenticeship



## Transnational mobility as an investment

Initially this article looked at the numbers involved in transnational mobility projects. Quantity is often brought forward in connection with mobility almost as a success criterion in its own right. It is clear, however, that numbers alone cannot be used as a success criterion for placements. In the context of VET, the “products” of mobility schemes are qualifications and competences that can improve the employability of those participating. It has been widely acknowledged that participation in a mobility project can foster vocational, linguistic, intercultural and transversal (personal) skills in individuals - skills increasingly in demand on a labour market constantly changing under the combined influences of rapid technological development and globalisation. The mere fact that 100, 1,000 or even 10,000 young people have participated in a transnational placement scheme is not in itself of any significance. The important thing is not that they went, but what they brought back in terms of skills and qualifications that can improve their employability.

Another way of measuring the scope of this type of mobility is by looking at costs. In the Leonardo da Vinci II programme, an estimated figure of 600 million Euros is earmarked for mobility (40% of the overall budget). As the programme grants offer a financial incentive, but do not cover costs, to this figure must be added a national co-financing of at least a similar amount. Adding financing from other European, bi-national national and regional programmes and initiatives, the amount is quite substantial. It is tempting to question whether there are appropriate returns on this investment in terms of competences that increase the quality of life of the participants, as well as the competitiveness of Europe as a global player. Anecdotal evidence of the beneficial effects of participation in a placement period abroad is often cited as irrefutable proof of its value, evidenced most frequently by the token “young person” appearing at conferences on mobility, testifying to its merits and the positive changes four weeks in a company abroad has brought into his life. The danger of this is

that it is equally feasible to find and feature at such an event a young person for whom the transnational experience was negative. Neither can claim to represent the “truth”, without supporting these statements with reliable and valid findings from extensive evaluations of mobility projects or programmes. Such evaluations are exceedingly difficult to undertake and, at the present time, there are not adequate methodologies to serve the purpose. There have been attempts at regional and national level that contain promising leads that can be further developed into useful methodologies. The need for evaluation does not only concern the overall learning process itself, but also the individual didactic practices, which need to be constantly assessed and improved, or, if necessary, replaced.

## The challenge ahead

The central problem in connection with transnational mobility is the overall lack of established didactic practice and professionalism in the field. Despite transnational mobility for over 10 years being an important element in European VET policies, the level of knowledge on the various aspects of “project engineering” has arguably hardly improved since the Petra II programme, despite the significant increase in quantity. Part of the explanation, it has been suggested, lies in the fact that the theme of “transnational mobility as a didactic practice” still has not been recognised by many central actors at local and regional level (school directors, curriculum developers etc.) who tend to view it more as some sort of exotic school outing rather than a pedagogic activity, and who allocate esteem and resources to it accordingly. There is, however, an even more pertinent explanation that arises out of the very transnational nature of the activities.

Going back to Lave and Wenger’s idea of knowledge development arising in “communities of practice”, it is clear that such a community (or communities) has never really existed for placement organisers in the sphere of transnational mobility. Despite the many people involved, most placement organisers remain isolated in their vocational colleges, with little contact between them. Newcomers to the

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***“The research and development community on mobility as a didactic tool is at best a very narrow one and is widely dispersed in terms of geography and disciplines.”***

scene, instead of capitalising on the experience of others, are to a large extent forced to “reinvent the wheel” and learn from their own mistakes. The knowledge base they build up is in most cases, lost again when they move on as there is no community to pass it on to. Some national coordination units (NCUs) of the Leonardo da Vinci programme have tried at national level to organise annual meetings of placement organisers, but problems lie in large travel and accommodation costs and the difficulties of elaborating an agenda that caters for a very heterogeneous group. Another problem with these strictly national communities is that they do not involve the practitioners responsible for organising the project in the host country. There is a strong case for making communities of practice in this field - like the projects themselves - transnational. A similar plight exists in the field of research and development on mobility. Research and development activities are important to deepen our insight and knowledge of

the learning process, and, on the basis of this, develop tools and procedures to professionalise and alleviate the tasks of those involved. The research and development community on mobility as a didactic tool is at best a very narrow one and is widely dispersed in terms of geography and disciplines. The challenge is to find ways of setting up suitable platforms, be they “traditional” (conferences and seminars) or based on the new information and communication technologies, for such communities to form and grow to create the proper receptacles for knowledge and vehicles for its transfer. These platforms must also ensure the cross-fertilisation between practitioners and the research and development community, and must, necessarily, be transnational in nature. This is the first prerequisite for a development in the direction of a professionalisation of the use of the tool. The raw material is already there, from more than 10 years of intensive practical experience.

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# What can we learn from the use of qualifications with a dual orientation across Europe?



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## Introduction

European partners in two Leonardo da Vinci projects (INTEQUAL and DUOQUAL - see list of projects) have analysed qualifications with a dual orientation. These are qualifications at secondary education level which combine vocational and general education and provide a dual orientation towards employment and higher education. The schemes of qualifications with a dual orientation (or *Doppelqualifikation*) analysed by the partnership are schemes which:

a) extend over an integral part of the whole education sector, such as the study branches in the Czech Republic, vocational courses in Portugal and vocational programmes or streams within the comprehensive school systems of Norway and Sweden;

b) refer to individual courses or qualifications, e.g. the Vocational Baccalauréat in France, the Advanced General National Vocational Qualification (GNVQ) in England, the Integrated Multivalent Lyceum (IML) in Greece, the senior secondary vocational education (MBO/BOL4) in the Netherlands and the WIFI Academy courses in Austria;

c) represent pilot projects within established systems of vocational education and training, including the experimental reform in Finland and individual projects in Germany (Bavaria/Brandenburg).

The focus of this article is 'lessons of mutual learning', drawn from these schemes in a collaborative process. This approach of collaborative investigation and mutual learning has been developed in a group of Leonardo da Vinci projects, supported by accompanying measures on behalf of Cedefop. As put forward in the European vocational training conference in Vienna in 1998, "the emerging culture of mutual learning is emphasising the role of 'complementary areas of policy-development' or 'reshaping existing structures to incorporate new transitional models' or 'creation of comparable circumstance for piloting similar ideas within different systemic environments'" (Kämäräinen, 1998).

Among the projects piloting this approach as a joint objective have been EUROPROF, POST-16 STRATEGIES/SPES-NET (see list of projects), and INTEQUAL/DUOQUAL. The concept of mutual learning and the practical experience gained in this process have been reflected in several studies (Attwell 1997; Heidegger 1996, 2000; Kämäräinen 2000; Lasonen 1998; Lasonen & Manning 1998; Stenström 2000). The procedure and outcome of mutual learning in the projects INTEQUAL/DUOQUAL is investigated below, including the methodological approach, the analysis of evidence and conclusions.

## Approach

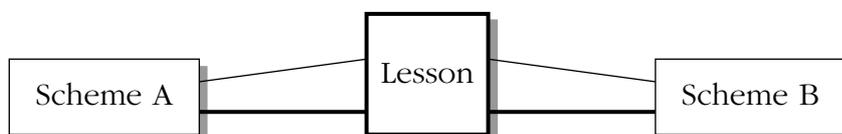
The partnership carried out several roundtable sessions to discuss what can

**This article focuses upon lessons of mutual learning. It uses an approach of collaborative investigation and mutual learning to analyse the results of two European Leonardo da Vinci projects in qualifications with a dual orientation. It identifies some of the key lessons to be drawn from different schemes for qualifications with a dual orientation.**



## Comparative approach to mutual learning

Table 1



*“The lessons of mutual learning drawn by the partners across various countries implicitly take account of national contexts. For the comparative analysis of these lessons, however, the contextual framework of qualifications with a dual orientation has to be made more explicit. (...) a typology of national settings has been applied identifying the basic relationship between education and work.”*

we learn from one another. Each partner assessed the strong and weak points of their scheme and considered lessons from others in the national context. The discussions among the partnership were based on a conceptual approach of sharing knowledge for mutual learning (Brown & Manning 1998; Manning 1997). The starting point of this approach is that there are no general lessons in their own right: lessons are always contextual, related to the schemes providing and receiving them. The lessons in general are related to specific schemes, ie a lesson is normally drawn from a given scheme A to feed into one's own scheme B. In this process, the lesson is determined by aspects of both the scheme A (e.g. good example) and the scheme B (e.g. problem requiring a solution). This interrelation is of course further influenced by factors such as the perception and experience of the partner drawing the lesson (see table 1).

Following the guiding question (what lessons can we learn from one another?) the focus is on the lessons rather than the schemes themselves. The aim is to identify stimulating lessons, including good practice, not to evaluate the schemes.

In the final discussion among the partners, project experience was related to the potential of qualifications with a dual orientation set out in a model (Lasonen & Manning 1999). This model combines three criteria relevant for the quality of vocational education and its standing vis-à-vis general education: providing personal competence and facilitating mobility both in the education system and the labour market (see table 2).

The lessons of mutual learning drawn by the partners across various countries implicitly take account of national contexts. For the comparative analysis of these lessons, however, the contextual framework of qualifications with a dual orientation has to be made more explicit. Drawing on parallel research (Lasonen & Manning 1999), a typology of national settings has been applied identifying the basic relationship between education and work. The following three types of national settings are distinguished (see table 3):

a) type I: a predominantly close relationship between the education system and the labour market, based on a tracked system of education and a qualification structure which has direct relevance for occupational entry;

b) type II: a predominantly loose relationship between the education system and the labour market, characterised by a large proportion of school-based vocational education with broad specialisation and subsequent on-the-job training;

c) type III: a varied relationship between the education system and the labour market, featuring both school-based/broadly specialised vocational education and work-based/apprenticeship-type education with different occupational patterns.

## Analysis

The results of the roundtable discussions on lessons of mutual learning are analysed according to four questions:

a) to what extent do the schemes of qualifications with a dual orientation meet the three quality criteria (personal competence, educational mobility, occupational mobility)?

b) which problems are shared among the schemes of qualifications with a dual orientation?

c) which lessons are drawn across schemes of qualifications with a dual orientation?

d) what examples of good practice are identified in schemes of qualifications with a dual orientation?



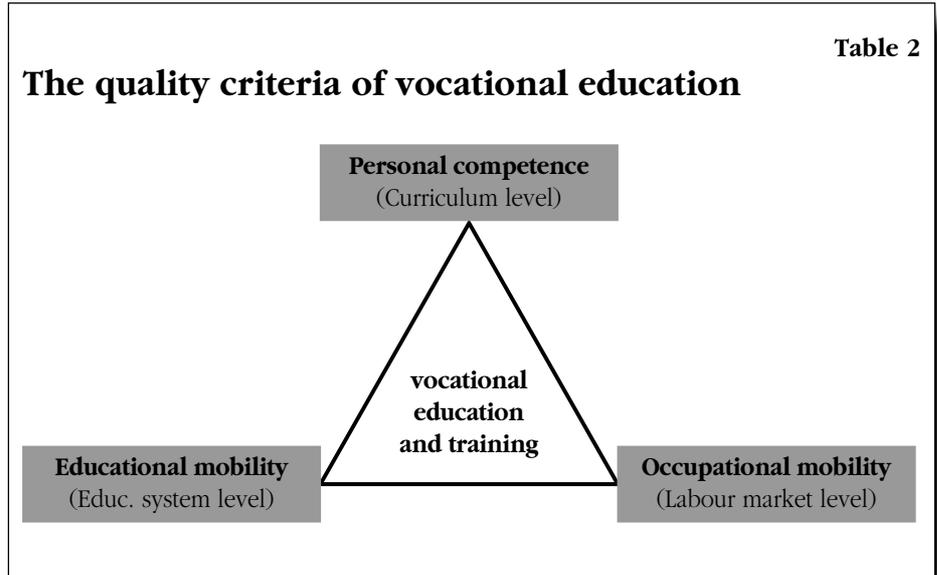
The evidence is assessed, for each question, according to the national settings of the schemes concerned.

**Quality criteria of qualifications with a dual orientation**

In the roundtable discussion, partners were asked: how successful are the schemes in achieving quality according to the three criteria (personal competence, educational mobility, occupational mobility)? Each partner considered this question with regard to their specific scheme and not in comparison to the other schemes. For the assessment, the partners suggested three options: achieving quality; not achieving quality; no change.

The roundtable discussion arrived at an altogether positive assessment of the quality of qualifications with a dual orientation according to the three criteria (with regard to nine schemes involved, quality marks were given seven times each for competence and educational mobility and six times for occupational mobility). Comparisons between the schemes, however, should be made with caution. Since the question focused on the individual schemes, the partners assessed these in their national contexts and not in comparative perspective. Their judgements, therefore, reflected national standards and expectations, which may differ considerably between the countries and schemes concerned. If, for instance, the Dutch expert regards the competence development in the MBO/BOL4 scheme, viewed from high requirements, as not successful, this in no way suggests that this scheme has 'lower quality' in competence development than the rest of the schemes which are marked as successful.

Nevertheless, the overall positive assessment corresponds to the outcome of the comparative analysis in the DUOQUAL Survey (Manning 1998). Altogether, qualifications with a dual orientation potentially live up to the criteria identified for high quality and standing of vocational education and training, providing personal competence and facilitating mobility both in the education system and the labour market (Lasonen & Manning 1999). The assessment against the quality criteria also suggests, at least from the individual partners' perspectives, that there



**Table 3**

**The typology of national settings**

Relation between education and work	Country
Type I = predominantly close	Austria, Czech Republic, Denmark, Germany, Netherlands
Type II = predominantly loose	Sweden
Type III = varied	England, Finland, France, Greece, Norway, Portugal

is no general distinction between 'strong' and 'weak' schemes or between 'providers' and receivers' of lessons. The process of mutual learning is related to a much more differentiated analysis and perception of the strong and weak points of the schemes, which will be taken up in the following two sections.

**Problems of qualifications with a dual orientation**

After assessing the success of their schemes, the partners were asked about the problems in the scheme of qualifications with a dual orientation? This question again focuses on the individual scheme, but opens up the debate about specific as well as common issues.

The concerns addressed by the partners reveal a striking similarity across schemes and national settings. They focus, above all, on the problem of how to achieve a

*“Altogether, qualifications with a dual orientation potentially live up to the criteria identified for high quality and standing of vocational education and training, providing personal competence and facilitating mobility both in the education system and the labour market (...)”*



*“(...) concerns (...) focus, above all, on the problem of how to achieve a genuine integration of vocational and general subjects in the curriculum and the learning process. In particular there is a tension, (...) between pedagogic innovation on the one hand and the traditional divide between the academic and vocational ‘worlds’ (...) on the other.”*

*“In a context of wide-ranging problems of transition from education to work, with a large section of young people being at risk, pathways with a dual qualification are in effect selective, leaving those perceived as ‘low-achievers’ (...). The challenge for educational policy is to ensure that schemes of qualifications with a dual orientation are part of transparent and flexible systems, accessible from any point and linking up to other parts of education and training (...).”*

genuine integration of vocational and general subjects in the curriculum and the learning process. In particular there is a tension, perceived in several schemes (Czech Republic, Greece, Finland, the Netherlands, Norway, Portugal, Sweden), between pedagogic innovation on the one hand and the traditional divide between the academic and vocational ‘worlds’ (in terms of institutions, administration, qualification structures, teaching staff) on the other. Lack of work-place training (outside schools) has also been identified as a major drawback (Czech Republic, Norway, Portugal, Sweden). The integration between theory and practice in everyday classroom and workshop activities is considered a challenge (Norway). Commitment to self-directed learning may be hampered by atomistic assessment (England).

Several schemes (Austria, Germany and Finland), while being considered successful in terms of quality criteria, turn out to be restrictive in access. This draws attention to a general concern which has been raised about qualifications with a dual orientation. In a context of wide-ranging problems of transition from education to work, with a large section of young people being at risk, pathways with a dual qualification are in effect selective, leaving those perceived as ‘low-achievers’ behind. The challenge for educational policy is to ensure that schemes of qualifications with a dual orientation are part of transparent and flexible systems, accessible from any point and linking up to other parts of education and training (see Lasonen & Manning 1999).

### **Learning across schemes of qualifications with a dual orientation**

The discussion of problems encountered by individual partners gave way to a joint learning process. This was carried further by addressing the question: of which approaches from other schemes may be worth considering. Altogether, 29 lessons have been drawn for 11 schemes (requiring or welcoming approach), with 44 references being made to 11 schemes (providing approach). Certain points are worth noting.

Mutual learning among partners has been concerned, most of all, with curricular issues (26 lessons), hardly at all with educational and occupational mobility. This may be partly due to the focus set in the partnership project on issues related to curriculum and learning. There are, however, more fundamental reasons. The collaborative analysis of qualifications with a dual orientation has shown that curriculum and learning processes are central to the reforms and pilot projects. These components are also essential for the success of the schemes, including the educational and occupational mobility of the students. Furthermore, curricular issues tend to be less determined by the national setting of the scheme than mobility issues which are tied up with the education system and the labour market respectively.

Most of the lessons drawn from other schemes are related to the problems which have been identified in the original schemes. While the matching of encountered problems and envisaged lessons is hardly surprising, the exceptions are also illuminating. On the one hand, some problems may be specific to the national setting or just identified in the national context. In any case, answers to problems are sought first of all in the national environment. On the other hand, some lessons may have been inspired by noting advantages of other schemes and relating these to limits and weaknesses or orientations of one’s own scheme.

Lessons are drawn both across schemes of different types of national settings (27 references) and between schemes of the same type (17 references). This diverse pattern supports the assumption that mutual learning, in particular on curricular issues, is not limited by systemic differences.

References are made to schemes of all three types, in most cases to the schemes of Germany, Norway, England and Austria. This choice may be partly explained by innovative approaches taken in these schemes which have attracted attention. However, another reason is likely to be the implicit direction of the learning process in the partnership: the first project (INTEQUAL) has provided the basis for the multiplier project (DUOQUAL), offering rich experience (including the four



schemes above!) for the enlarged partnership.

A closer look at the content of the lessons reveals that approaches to integrating vocational and general education, to assessing competences and to improving the cooperation between institutions of education and work are in the centre of joint interest. These curricular issues may be regarded as central to qualifications with a dual orientation, also providing the basis for educational and occupational mobility. The major approaches considered as 'lessons' in individual schemes are set out in table 4.

These approaches are of course integral part of the individual schemes and their national contexts. They could not be 'transferred' to any other scheme or put together as 'ingredients' for improving or recreating it. However, the conceptual ideas behind them and the practice they embody in each case may promote fresh thinking about related concerns in other schemes.

#### **'Good practice' in schemes of qualifications with a dual orientation**

The references to interesting approaches observed in other schemes are also an indicator of the success of qualifications with a dual orientation, even if relative to the specific starting point of the learning process. To get a broader picture of successful experience, partners were asked about what works well in their schemes of qualifications with a dual orientation. Their assessment not only complements the previous look for approaches by other schemes, but also serves as a presentation of 'good practice' which may offer further stimulus to other schemes.

This assessment of what works well in a given scheme mostly relates to the national context, contrasting the qualifications with a dual orientation with conventional patterns of vocational and general education at upper secondary level in the country concerned. The evidence of 'good practice', therefore, is specific to the individual scheme and internal national debate. This distinguishes 'good practice' from the 'lessons' (table 4) which are related to perceived issues or problems of other schemes. Furthermore,

### **Lessons from schemes of qualifications with a dual orientation**

**Table 4**

- combining technical and general contents in the curriculum (Germany, the Netherlands);
- integrating general and vocational subjects (Greece);
- providing practical work and work life learning as a base for theory learning (Germany);
- arranging for an apprenticeship as optional period of work-based training (Norway);
- offering a gradual access to specialisation according to a tree-like pattern (Norway);
- preparing for social participation and citizenship (Germany, France, Norway, Sweden);
- flexibility in planning students' curricula (Sweden);
- allowing for a variety of learning styles (England);
- oral exams facilitating synoptic assessment (Czech Republic);
- giving a certain leeway with training time (England, the Netherlands);
- providing a flexible modular system (England);
- cooperation between institutions of general and vocational education (Finland);
- providing general and vocational programmes in one institution (England; Norway);
- providing different levels of vocational programmes in one institution (the Netherlands);
- developing vocational programmes at advanced level for those who possess lower level vocational qualifications (Austria, France);
- offering higher education of dual character for students with apprenticeship background (Austria, Germany);
- trainer coaching for integrated courses (Norway);
- supplying financial aid to the firms for work based training (Norway).

'good practice' is more focused on what actually works well, based on internal enquiry and evaluation, while 'lessons' might refer to both practical experience and conceptual approaches.

The major output of 'good practice' established in schemes of qualifications with a dual orientation is summed up in table 5, grouped according to the three aspects of quality, (see the countries noted in brackets).

The above mapping of 'good practice' partly corresponds to the evidence which has been reported in the lessons (see table 4), but it opens up a wider spectrum of positive experience. Evidence of 'good practice' refers to all aspects of quality: both competence and educational/occupational mobility. This is important for underpinning the assumption about the



Table 5

### 'Good practice' in schemes of qualifications with a dual orientation

#### *Curriculum/competence development*

- broad general and basic vocational content in educational programmes (Czech Republic);
- integration of vocational and general learning objectives/subjects (Germany, Greece);
- flexibility concerning study times (Finland);
- focus on everyday work in classes and pedagogy for new competences (Norway);
- dynamics and innovation in schools (Portugal);

#### *Education system/educational mobility*

- participation of large age group (Czech Republic, Norway, Sweden);
- attractiveness for high-achievers (Germany, Finland);
- common certification for various dually qualifying pathways (Austria);
- enhancement of educational mobility between general and vocational lines (Finland);
- progression route into higher education (England);

#### *Labour market/occupational mobility*

- close cooperation with industry (Germany);
- social promotion and employability through professional diploma (Portugal);
- work-place training as factor for gaining employment (Sweden);

#### *Both educational and occupational mobility*

- combination of different types of qualifications with a dual orientation for individual target groups (Czech Republic);
- both access to higher education and entry to occupational practice (Greece, Finland, The Netherlands);
- shared responsibility of school authorities and working life organisations (Norway).

## Presentation

The process and outcome of mutual learning in the partnership have been presented in a knowledge base available on the home page of the Research Forum WIFO Berlin (<http://www.b.shuttle.de/wifo/duoqual/=base.htm>). The electronic base has emerged in the course of project work, serving both as common resource for the partners and as dissemination site for the wider public. Particular effort went into finding ways of how to make the learning process 'visible'. The particular section on 'lessons of mutual learning' starts out from the methodology adopted in the roundtable sessions, provides structured assessments of individual schemes (see table 6) and sums up the results of the roundtable discussion.

## Conclusion

The results of mutual learning back up hypotheses put forward in earlier phases of the partnership project, in particular that

a) qualifications with a dual orientation potentially live up to the criteria identified for high standing of vocational education and training: providing personal competence and facilitating mobility both in the education system and the labour market. Both the assessment put forward by partners at the roundtable and the evidence from the detailed comparative survey of the schemes (Manning 1998) support this hypothesis. To a considerable extent, qualifications with a dual orientation meet the quality criteria not only 'potentially' but in real terms; at the same time they show a significant potential for advance and improvement.

potential of qualifications with a dual orientation in meeting the quality criteria of vocational education and training. Furthermore, 'good practice' is reported across the whole range of schemes involved in the project. In particular the evidence of the newly included schemes (Czech Republic, Greece, Finland and Portugal) enriches the partnership experience about qualifications with a dual orientation.

b) there is considerable opportunity for the exchange and transfer of experience across schemes and national systems. The final roundtable discussion provides rich evidence for this hypothesis. More specifically it suggests that curricular approaches, in particular competence development, are more open for mutual learning across schemes than issues of educational pathways and of occupational careers (which are more firmly embedded



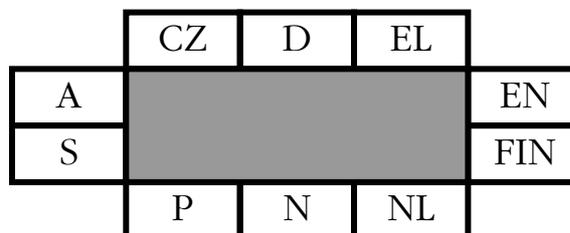
in national settings). It should be noted, though, that the 'exchange and transfer of experience' as practised in the process of 'mutual learning' within the partnership is confined to the conceptual level, while the practical implications are left open.

The lessons identified by the partnership are to be taken up at national and European level for detailed discussion with policy makers, practitioners and researchers in education. The rich evidence displayed in the DUOQUAL Knowledge Base (Manning 1999) can support this process of continued learning.

Table 6

### Assessment of schemes

In preparation for the roundtable on mutual learning, the partners have assessed their schemes of qualifications with a dual orientation in the following countries:



Each partner answers three questions:

1. What works well in this scheme?
2. What are the problems with this scheme?
3. What can be learned from other schemes?

<<http://www.b.shuttle.de/wifo/duoqual/less-ass.htm>>

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### List of projects

(1) **EUROPROF**/Leonardo da Vinci Surveys and Analyses project (1995-1997).

**Title:** New forms of education of professionals for vocational education and training.

(2) **INTEQUAL**/Leonardo da Vinci Surveys and Analyses project (1995-1997).

**Title:** The acquisition of integrated qualifications for professional work and study - an assessment of innovative approaches in seven European countries.

(3) **DUOQUAL**/Leonardo da Vinci Multiplier-effect project (1997-2000) based on INTEQUAL.

**Title:** Qualifications with a dual orientation towards employment and higher education - applying a pattern of comparative investigation across European countries.

**Coordinator** (INTEQUAL/DUOQUAL): Sabine Manning, Research Forum Education and Society (WIFO), Berlin.

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Institute for Educational Research (IER), University of Jyväskylä, Finland (DQ);

Institute for Employment Research (IER), University of Warwick, England (IQ/DQ);

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(4) **POST-16 STRATEGIES**/Leonardo da Vinci Surveys and Analyses project (1995-1997).

**Title:** Finding new strategies for post-16 education by networking vocational and academic/general education and working life to improve the parity of esteem for initial vocational training.

**Coordinator:** Johanna Lasonen, Institute for Educational Research, University of Jyväskylä.

(5) **SPES-NET**/Leonardo da Vinci Multiplier-effect project (1997-2000) based on POST-16 STRATEGIES.

**Title:** Sharpening the post-16 education strategies by horizontal and vertical networking.

**Coordinator:** Marja-Leena Stenström, Institute for Educational Research, University of Jyväskylä.



# Towards learning for the future: some practical experiences



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## Introduction

The General and Vocational Education Study Group of the European Community called in 1997 for 'vocalisation and preparation for entry into a complex, demanding and rapidly changing world of work ... at all stages of education systems' as a third essential function of education alongside the development of the personality and socialisation (European Community 1997).

According to Opaschowski (1999), certain 'core trends' will guide social development in the Western world (including the United States and Japan) over the next decade. Some of those of relevance to the education system are mentioned in the following list, with brief explanatory notes:

a) globalisation: work shared out across the world – decline in work in the traditional sense – need for extension of the concept of work beyond gainful employment to include human and social services;

b) services: structural change from industrial society to service society based on information technology – expansion in security, care and health services – development of experience-oriented leisure society (tourism, media, etc.);

c) increased flexibility: frequent changes of occupation and job;

d) ageing: rise in life expectancy in Western industrialised countries by middle of next century to average 90 years – doubling of proportion of population aged 60+ in Germany;

e) individualisation: the key figure of the industrial age was the 'employee' – the performance target for the future is 'life-long entrepreneurship';

f) spread of media: worldwide breakthrough for the new mass medium of the Internet.

These trends will give rise to a changed and expanded perception of the purpose of vocational training. In the 1980s and 1990s, changes in the organisation of work in industrialised societies<sup>1</sup> led to the deliberate promotion of key skills that went beyond specialist competency. Such essential skills as 'flexibility, capacity for decision-making, spirit of enterprise, capacity for abstraction, team spirit and learning capacity (self-learning skill)' have a 'key role in the present and future organisation of work' (European Commission 1993). These skills are still indispensable prerequisites for carrying out employment tasks (Ott 1999). This is confirmed by a survey carried out in 1998-99 in Germany by the Federal Institute for Vocational Training Affairs and the Institute for Labour Market and Vocational Research on structural change in the world of work: since 1991-92, the extent of autonomy in the organisation of work has increased, the degree of monotony at work has declined, and the demand for innovativeness and creativity at work has increased (Dostal et al., 2000). The skills referred to are also indispensable if people acting autonomously are to carry out tasks successfully in any situation in life (see table 1).

In pursuit of the guiding principle of 'education for lifelong learning', the enlarged perception of the purpose of vocational education means:

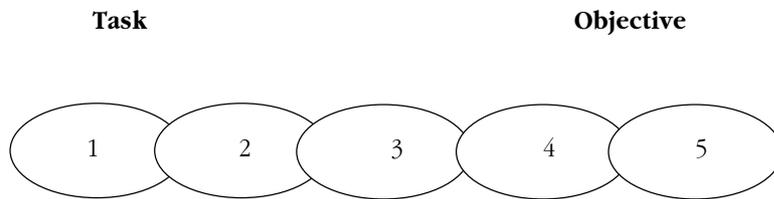
**Core trends are guiding social developments enlarging perceptions of the purpose of vocational training. This article looks at three pilot projects in Germany with outcomes of possible interest to countries with different training systems. Experience from the projects leads to some conclusions for the future development of schools as 'learning centres'.**

(<sup>1</sup>) From the conveyor belt to integrated assembly, and from isolated commercial activities to responsibility for complete cases.



**Table 1**

**Model of a complete action**



Stages

- 1) Analyse task, possible solutions and conditions affecting action
- 2) Draft action plan (intermediate objectives and working steps)
- 3) Assess and decide on action plan
- 4) Carry out action plan
- 5) Check and evaluate outcome and action process

The 'new' objective of education can be summarised as overall ability to act in occupational, private and social life. The following are particularly important:

- a) occupational and specialist skills (knowledge, abilities);
- b) problem-solving ability, especially analytical, planning and decision-making ability;
- c) capacity for interaction, especially collaborative and communicative ability;
- d) capacity for taking responsibility, individually and socially.

Many of the trends mentioned have already been noticeable for some time (see, for example, Commission 1993). Numerous pilot projects in Germany have attempted to develop new training courses<sup>3</sup> to take account of them. There follow reports on some of these pilots, and on follow-up activities.<sup>4</sup> All references to teaching relate to vocational courses in schools.

Only reports of outcomes which may be of interest to countries with different training systems are discussed. The headings chosen represent in my view major steps towards the future of vocational education in schools:

- a) linking work and learning in vocational training;
- b) training teachers and creating the requisite conditions in schools;
- c) new roles for teachers and learners.

The three practical experiences described will be summarised at the end and supplemented by some key considerations for the future development of schools as 'learning centres'.

**Linking work and learning in vocational training**

In North Rhine-Westphalia, pupils qualifying for entry to the Fachoberschule (specialised upper secondary school) can take a two-year Berufsfachschule (full-time

a) no longer being trained solely for one occupation, but also for jobs in the humanitarian and social field, including unpaid work. So-called honorary activities are becoming increasingly widespread in Germany;

b) the vocational training system has to face up to the challenge of training people to manage their lives purposefully during the lengthening period after gainful employment, since work plays a key part in human existence.

So-called (unpaid) voluntary work<sup>2</sup> is of great significance, not only after but also during the phase of paid employment. This has been demonstrated in the first representative sample survey carried out in Germany (Bundesministerium 2000), according to which 34% of those aged over 14 years (approx. 22 million people) are engaged in voluntary work (37% among those aged 14 to 25). The willingness to take on voluntary tasks and work assumes a general predisposition towards social behaviour, which is fostered by a sense of 'belonging' to a wide circle of friends and acquaintances and to a church, and by higher educational qualifications, among other things.

(<sup>2</sup>) In, for example, sports, leisure and cultural activities, schools, social work, churches, politics, youth work and life-saving associations.

(<sup>3</sup>) See the publications of the Federal Institute of Vocational Training. Address: Bundesinstitut für Berufsbildung, Hermann-Ehlers Strasse 10, D-53113 Bonn.

(<sup>4</sup>) The author of this paper has been involved in these as project director or adviser.



(basic) vocational school) course providing a basic training in commerce and the school element of qualification for entry to Fachhochschule (post-secondary technical college).<sup>5</sup> This course, at the 'Höhere Handelsschule' (upper secondary commercial school), was based almost entirely on theory until the mid-1980s. It was vital to relate the training more closely to practice by giving learners first-hand experience of operations, and hence to make it more effective.

A pilot scheme was tried out in four schools between 1985 and 1988 to see how this goal could be achieved through learning about work in a 'learning office' (Halfpap 1993). For this purpose, realistic offices were set up in schools so that learners could plan, carry out and evaluate commercial activities. Pupils spent one day a week working on and learning about typical commercial jobs in the departments of a model company: purchasing, sales, warehousing, and sometimes manufacturing, accounting, and personnel/general administration (see table 2). The commercial activities were real, the only simulation being the actual exchange of goods.<sup>6</sup>

A model company is an idealised depiction of reality and creates a framework for learning about work at school (not only in the learning office, hence the two-way arrow between the office and the school subjects in table 2).<sup>7</sup> Learning about work in a learning office can be described as follows:

a) learning is graded in increasing degree of difficulty, in accordance with didactic principles. This grading relates particularly to the complexity of the working processes and the subject content of information, and to learners' freedom of decision in the autonomous and joint planning and conduct of work processes;

b) it is action-oriented and highly efficient learning because it is based on the individual, structured around activities, experiential, interactive and holistic. Learners are no longer consumers of knowledge but must play an active part in their own learning;

c) the learning calls for changed behaviour on the part of teachers, leading to

## Links between practice and theory in the Learning Office

Table 2

Workplaces for commercial clerks in real companies

*Vocational orientation*

### LEARNING OFFICE of model company

with departments (e.g. purchase, sales, etc.)

*Academic orientation*

Teaching subjects: commerce, English, politics, German, etc.  
< relevant academic subjects >

the creation of interactive partnerships: teachers arrange learning through team teaching, acting as advisers and helpers while learners work and learn;

d) it is learning that binds subjects together and requires close coordination between the course subjects.

Learning offices have now been introduced in all schools in North Rhine-Westphalia, and in other German Länder.<sup>8</sup> Initial steps have been taken for the introduction of this scheme in Hungary, and lately Russia and Poland. The Federal Institute for Vocational Training Affairs (BIBB) has provided support for the opening of model vocational training centres in numerous cities in central and eastern Europe (BIBB 1996). All of these are equipped with learning offices in their commercial sections. Under this project, for example, one model centre in Moscow is receiving support from a school

(<sup>5</sup>)After further training in an enterprise, this qualification entitles the school-leaver to study at a Fachhochschule. The qualification for entry to a Fachoberschule is an intermediate school certificate obtainable after 10 years of general education.

(<sup>6</sup>) At the time, it was not acceptable for schools to set up real businesses run by pupils. This is happening increasingly today.

(<sup>7</sup>) The arrow from the teaching subjects to the learning office is intended to show that many subjects influence what is done in the learning office. The arrow leading to the teaching subjects is to show that the data from the model company can and should be used also in those subjects.

(<sup>8</sup>) See, for example, Achtenhagen and Schneider 1993.



which took part in the 'learning office' pilot scheme in North Rhine-Westphalia. In Poland, there are 'model learning offices' in Poznan and Koszalin. In the three republics of Estonia, Latvia and Lithuania, model vocational education centres have been developed with the support of the relevant ministries in Germany and the Baltic States, of BIBB and of Institutes in the Länder of Hessen and North Rhine-Westphalia.<sup>9</sup>

Learning about work in learning offices has now been extended to other courses in North Rhine-Westphalia, to training for office clerical staff, for example. Schools also use model companies with appropriate accommodation and facilities to teach other specialisms, training staff for legal, medical and dental practices, transport companies and retail.

### Training teachers and creating the requisite conditions in schools

A 'learning office' pilot scheme extended to the Land of Brandenburg in 1992-95 was built on experience in North Rhine-Westphalia. Teams of teachers were trained initially at six schools to work in learning offices. The pilot scheme (Halfpap, Oppenberg and Richter 1996) related to two-year full-time school-based vocational courses training commercial assistants. In the first year, two schools each were advised by teams of teachers at partner schools in North Rhine-Westphalia. After one year, the demand for this course was so great<sup>10</sup> that it had to be offered at additional schools. At the conclusion of the pilot scheme, 16 schools in Brandenburg were taking part. One year later, all 20 schools – with one exception – had learning offices, supported by further in-service training.

This pilot scheme, the coverage of which was expanded, presented the four teams of moderators with an unexpectedly great challenge. (A fourth school was found to join.) The only way of carrying out the task was by means of consistently action-oriented in-service teacher training.<sup>11</sup> Teams from neighbouring schools met several times a year in Brandenburg for one-week training courses moderated by

the teams of teachers from North Rhine-Westphalia. The aim was not to give the teachers more specialist knowledge but to train them in teaching methods and to enable them to organise themselves to work in teams.

They therefore had to learn to plan integrated action learning, using the model of a complete action (table 1). This calls for new high-level planning ability on the part of the teacher. To encourage learners as far as possible to organise their own actions, thereby teaching capacity for action in a wide range of real-life situations, the teacher must arrange the learning environment and learning conditions in a way that enables learners to plan and shape their own learning.<sup>12</sup>

Full implementation of the scheme in Brandenburg (and in North Rhine-Westphalia) made heavy demands on the teachers and the school management. The scheme assumes that the course is the key factor in the planning of learning and teaching in all subjects. In vocational schools there are very many courses leading to differing qualifications, in contrast to the situation in Gymnasien (academic secondary schools), for example, which only lead to one level of examination. It is neither effective, interesting nor meaningful for the future for learners who have chosen a vocational course to learn a foreign language, mathematics or economics *per se*. The link between one of these subjects and training for such jobs as commercial assistant or transport clerk, for example, must be made plain. If the content and amount of time allotted to the different subjects in a course are coordinated, learning will be encouraged because the interconnections thus become obvious and interdisciplinary learning becomes possible. Teachers can only achieve this through teamwork (including team teaching). Ability to work in a team can only be developed effectively, however, by doing it, i.e. by working in a team. The in-service training for teachers was arranged according to this principle.

The implementation of the concept of action-oriented teaching, and of course plans based on it, has significant implications for school management.<sup>13</sup>

<sup>(9)</sup> The author of this paper took part in 1996 in a workshop in Jurmala and Riga (Latvia) with management and teaching staff from model centres to exchange experience on the development of vocational training in those countries. The importance of learning offices was stressed, although these need to be complemented by practical placements in companies (Carl Duisberg Society 1997).

<sup>(10)</sup> Because it was not possible to provide company training places under the Dual System.

<sup>(11)</sup> This adult learning approach proved very successful. It is therefore possible to answer Blaschke (1997, p. 17) by saying that such a 'learning and teaching method for adults' does exist and is now widely practised.

<sup>(12)</sup> Onstenk (1995, p. 39) has pointed to the possibility of improving learning by strengthening the learning environment at the work place.

<sup>(13)</sup> A number of in-service training courses were held for members of school management in Brandenburg to facilitate the introduction of the scheme and ensure its success.



a) course conferences must be held with teachers of all subjects in the course to work out a rough outline of course teaching.<sup>14</sup> Teams of teachers must draw up an annual teaching plan and interdisciplinary learning action situations;

b) teachers need to work in teams on the same course over a long period. They largely organise their own work (including the breakdown of teaching hours). Only the number of hours per subject and teacher is laid down;

c) teaching accommodation must be equipped in such a way that cooperative learning in small groups and plenary work can be alternated, interweaving theory and practice (i.e. in a learning office or workshop laboratory).

## New roles for teachers and learners

In 1990-1993, a 'workshop laboratory' pilot scheme was conducted in Schleswig-Holstein.<sup>15</sup> This focused on promoting key skills, using the example of CNC technology on a technical course training grinding machine operators (Halfpap and Marwede 1994).<sup>16</sup> This promotion of key skills (see above) resulted in a different perception of the roles of teachers and learners, as will be explained below.

With the support of a team of teachers, pupils had to carry out a complex production task over six months (one 8-hour day per week) in the workshop, i.e. the 'laboratory' of a model company set up in the school.<sup>17</sup> The equipment available in the working space, which included a comprehensive library, made it possible for pupils to work individually or in small or large groups. Subject content drew on manufacturing and control technology, technical communication, materials technology, machine technology, commerce and community studies. These were reflected, for example, in preliminary calculation and post-production checking, in work preparation, in the programming office, and in production and control relating to the production of 'travelling centre points'.

The teachers kept detailed records of their work. Some of the important results of

the evaluation of teachers' training in learning through work are as follows:

a) learning through work makes heavy demands on teachers' planning ability (see above) and methodological flexibility;

b) teachers must learn to observe pupils' behaviour and to check it against set criteria, and deliberately to encourage behavioural skills;<sup>18</sup>

c) teachers must themselves act more or less as models, demonstrating capacity for action in a wide range of situations using the above-mentioned key skills.

When teachers' 'new' role is assessed, it should be asked, for example, whether the teacher has encouraged learners' capacity for action in a wide range of situations. Has the teacher successfully created action learning situations – as part of a team where appropriate – and facilitated integrated action learning?

Learners' 'new' role consists, for example, in the ability to document their own work, to handle software and machines, to work as part of a team, to find information, to use the knowledge they have acquired, and to speak in public (by giving a speech or making extensive contributions in class).

Where possible, learners' complex performance should therefore be judged and evaluated on the basis of their learning development in all the skills relating to capacity for action, in accordance with criteria which are clear and are known to the pupils.

## The process of developing schools into 'learning centres'

In 1992, the Prime Minister of the Land of North Rhine-Westphalia<sup>19</sup> set up an international education commission, which presented its research results, main proposals and recommendations in a report entitled 'The Future of Education – The School of the Future' (Bildungskommission 1995). The school of the future is described as a 'learning centre'. It will only be able to withstand the pressure of the

<sup>(14)</sup> Representatives of pupils on the course should also be invited to act as advisory members along with representatives, in dual system vocational schools, of the trainees working in companies.

<sup>(15)</sup> This pilot scheme had implications for school organisation and management similar to those of the pilot scheme in Brandenburg.

<sup>(16)</sup> These experiences also fed into the pilot scheme in Brandenburg.

<sup>(17)</sup> It is thus obvious that there was input from the experience of the 'learning office' pilot scheme in North Rhine-Westphalia.

<sup>(18)</sup> Social behaviour, too, can only be learnt at pupil level through reflective action, pupils' behaviour being worked through cognitively with them, for example.

<sup>(19)</sup> This was then Johannes Rau, who is now President of the Federal Republic of Germany.



demands placed on it in the future 'if it sees itself as a learning organisation' (idem). This requirement is the same as that expressed by the authors of the study 'The Learning Organisation' in their vision for the development of human resources for initial and continuing training in enterprises in the European Community: self-learning at the workplace is the model for learning in an enterprise which is a learning organisation, where work and learning are combined in an 'all-embracing culture of learning' (European Commission 1993).

As a learning centre, a school should develop its own pedagogical profile, so that all those working in it reach a consensus about the following tasks and place them in order of priority in their 'school culture':

- a) teaching of knowledge and personal-ity development;
- b) subject learning and interdisciplinary learning;
- c) social and applied learning;
- d) finding one's own identity and respecting others' integrity (Bildungskommission 1995).

One of the education commission's main precepts for vocational and continuing education is that 'the educational purpose of vocational education goes beyond occupational training. Vocational education is also general education' (idem).

It is possible, in my opinion, to summarise as follows the main implications for school development of the work of the pilot schemes:

- a) School profiles express the basic pedagogical orientations which are crucial in a school. The creation of such profiles calls for a high degree of autonomy on the part of each school, which needs to set down in writing its objectives, its strategies for achieving these, and its evaluation procedures.
- b) The style of teaching used in the course interweaves the objective course material<sup>20</sup> with the learners' subjective learning. Interdisciplinary action learning situations within a model company are a core ele-

ment of course teaching, and overcome the traditional teaching of subject knowledge in isolation.

c) Fields of action drawn from work, life and society determine the didactic approach used in curriculum development. Their content is described in detail in terms of intended abilities (specialist, methodological and social skills) and of the capacities required to handle action situations. These curricula are developed into a curriculum for each school by teams of teachers at course conferences.

d) Teacher training (initial and in-service) must be guided by an image of 'being a teacher' which has the paradigm of 'enabling learning' instead of teaching in the sense of conveying knowledge. It must give teachers the skills to educate, to advise, to innovate and to work in teams, and hence to play a part in shaping the profile of the school and in developing the curriculum as part of a course-teaching methodology.

e) School organisation and school management must facilitate and support the teaching plan outlined. This implies:

- a participatory guidance model in which teachers play a major part in organising their own work (in teams)
- an organisational structure based on courses or groups of courses, with teachers working on as few courses as possible
- flexible timetabling and facilities which encourage action-oriented learning and teaching.

Eleven 'requirements for roles of responsibility' have been derived from the study mentioned above to act as points of reference for the promotion of voluntary work (Bundesministerium 2000).<sup>21</sup> They were also, with hindsight, relevant in the pilot schemes reported here. Equally, they are key skills in paid employment and, as has been shown, apply to both economic and training activities. If they are followed, vocational training will provide preparation also for voluntary work:

- 1) room for independent action on one's own responsibility;

<sup>(20)</sup> This is prescribed in the curriculum (cf. Halfpap 2000).

<sup>(21)</sup> The twelfth requirement, 'the opportunity to change without the need to justify one's actions' only applies to voluntary work.



- 2) the opportunity to make use of one's own inclinations and abilities;
- 3) the opportunity to do something 'sensible';
- 4) the opportunity to do something which produces results;
- 5) recognition of responsibility;
- 6) the opportunity for self-organised teamwork;
- 7) the opportunity to monitor oneself;
- 8) a guarantee of adequate knowledge and abilities;
- 9) generous flexibility in timing;
- 10) the opportunity to take part in setting objectives;
- 11) a guarantee of 'activating' leadership.

It has been demonstrated at a conference, with the aid of 26 examples, how this concept can be applied in certain disciplines in the school of the future (Landesinstitut 1997). The section of the

report of a team of teachers working on 'Learning for Europe' which deals with the overall concept reads as follows:

'Learning for Europe cannot and may not be assigned to a separate subject. If young people's capacity for action is to be expanded to fit them for the broader and more complex field of action that will be Europe, course objectives need to be developed across subjects, and these have to be expressed in real terms, harmonised and set down in writing in binding form. It will therefore need to be established what contributions the individual subjects on the course can and must make to the achievement of the common objectives, and how the subjects must work together towards a common goal... 'Learning for Europe' can doubtless best be realised if learning takes place on the spot, that is, in other European countries or in close cooperation with foreign partners.' In this EU programme, 'Socrates' schools in Denmark, Germany, Hungary, The Netherlands, Portugal and the UK are taking part in vocational development through exchanges of experience.

Practical examples have shown that we are already moving towards learning for the future.

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**The experience of the Leonardo da Vinci project "Virtual Enterprises in Initial Vocational Training" (ISIS) suggests that the innovative concept of virtual enterprises can be successfully implemented in vocational education and training.**

# Virtual enterprises and vocational training

## Introduction

Decentralised business structures are on the increase as a reaction to the new demands of competition. Management of these structures is facilitated, or made possible in the first place, by the intensive dissemination and development of information and communication technologies (ICTs). As a result company structures known as 'virtual enterprises' develop.

Interpretations of virtual enterprises range from the notion of enterprises that do not really exist (practice firms), to enterprises that transact business through the Internet, to loose associations of independent companies that trade under a common name and are organised exclusively by means of ICTs.

Under the last interpretation of virtual enterprises, the characteristics of such virtual structures can be defined as follows:

- a) strong focus on finding solutions to specific problems (extremely client-oriented);
- b) temporary working organisation that breaks up after the problem has been solved;
- c) decentralised organisation of the 'problem-solving group';
- d) no permanent location, existing only on the Internet/intranet (extensive ICT application).

Setting up virtual enterprises in vocational training involves eliminating the traditional distinction of internal and external

training. Interested groups such as teachers, pupils, classes, technical/trade schools, commercial/administration schools, school principals and external consultants form a problem-solving collective and work closely together using ICT. To outsiders the virtual enterprise functions as if it were an independent enterprise or project. A teacher or a school class launches a learning project by offering it on a virtual market to other classes who want to contribute their specialised skills to a problem-solving exercise.

## Virtual organisation structures

Virtual organisation structures can be formed at different company levels, as illustrated in table 1 (Hofmann/Kläger/Michelsen, 1995).

Intraorganisational virtual structures exist within the legal perimeters of an independent enterprise (Klein, 1995; Kirn, 1995; Mowshowitz, 1986).<sup>1</sup> Technical implementation is achieved via an Intranet. Winand (1997) explains this as follows:

'The principle of virtual projects or processes in particular can now ... be applied to both intercooperation and intracooperation of organisations. In the first case cooperation is established beyond organisational perimeters. In the case of intracooperation, partners from different sections or departments of an institution are combined into virtual units... '

Interorganisational virtual structures are formed beyond the legal perimeters of

<sup>(1)</sup> In this context Olbrich refers to 'fake virtual enterprises' (see Olbrich, 1994).



individual enterprises and other organisations. Here technical implementation is achieved via an extranet or the Internet. The extreme form of interorganisational virtual organisation structures typifies virtual enterprises. Besides their intended temporary character, which is not necessarily inherent in intraorganisational virtual enterprise structures, virtual enterprises differ above all from the more widespread concept of virtual organisational structures in that they refer exclusively to interorganisational structures.

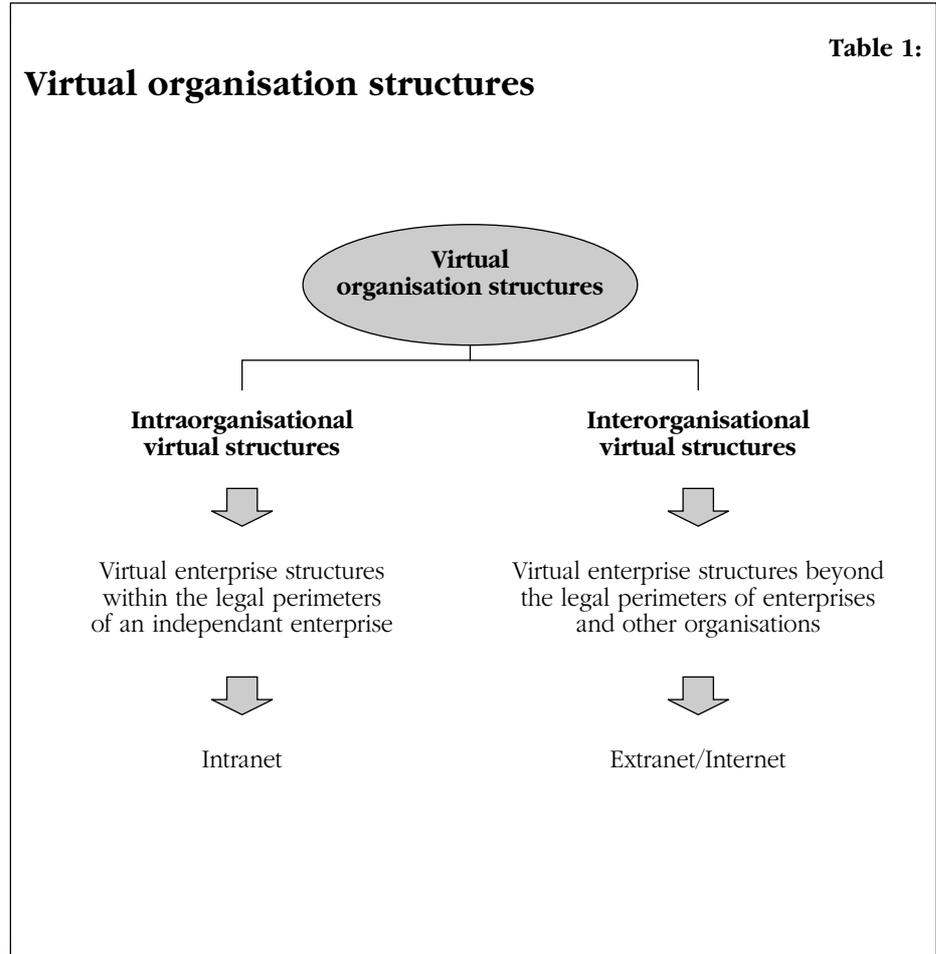
### Virtual enterprises

The concept of the virtual enterprise (VE) has received the greatest attention in the work of Davidow and Malone. They define VEs as enterprises that can supply customised goods and services, in large quantities where necessary, economically and quickly. Davidow and Malone refer primarily to goods and services and avoid any concrete definition of the term 'virtual enterprise' (Davidow and Malone, 1993). Nevertheless, their work has significantly advanced the debate on virtual enterprises and engendered many attempts to define the term.

In contrast to Davidow and Malone, who assume the existence of virtual enterprises, Fischer defines 'virtual enterprises' as short term organisations formed on an ad hoc basis comprising teams or individuals, i.e. a temporary combination of specialists (Fischer, 1995). In this definition Fischer refers to the characteristics of virtual enterprises, which he presents as follows:

- a) geared towards solving problems;
- b) quick;
- c) adaptable;
- d) partnership oriented.

More recently, temporary collectives of legally independent enterprises, reliant upon information technology, have been considered under the term 'virtual enterprises'. These exist only for the limited duration of a jointly pursued project so that the project-specific skills of the various partners can be utilised flexibly (see, for example, Winand, 1997; Pribilla, Reichwald and Goecke, 1996; Hoffmann, Hanebeck and Scheer, 1996; Reiß, 1996;



Winand, 1995; Flynn and Flynn, 1995; Klein, 1994). The 'problem-solving collective'<sup>2</sup> thus formed comprises different enterprises and breaks up after the successful conclusion of the project or after the problem has been effectively solved. Frequently this leads to new alliances, with different constellations according to circumstances.

To the 'problem possessors', the clients, such an alliance appears to be a business entity from which they receive a service as they would expect from a classical company. Yet there is no permanent physical structure behind the problem-solving collective.

Mertens and Faisst (1997) extend the definition to include individuals in the organisational alliance of virtual enterprises:

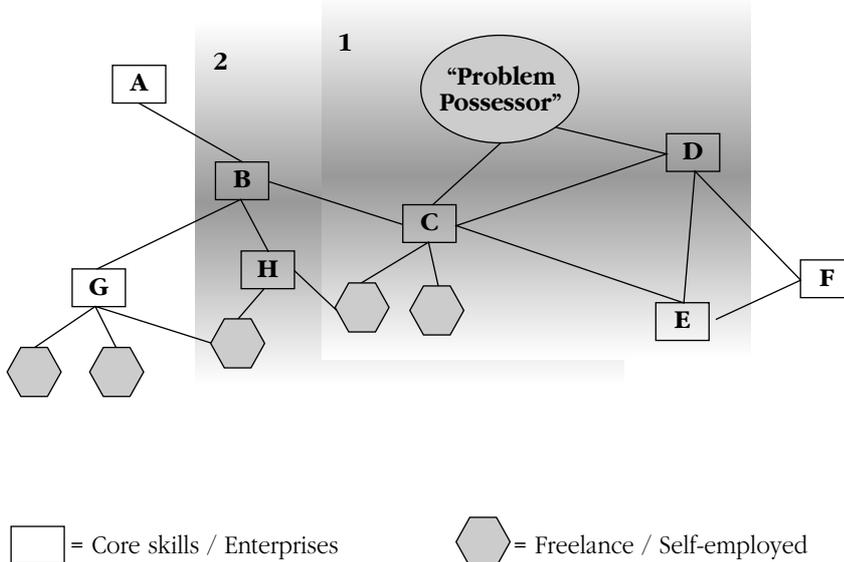
'A virtual enterprise is a form of cooperation between legally independent enterprises, institutions and/or individuals who provide a service on the basis of a common business under-

<sup>(2)</sup> See Fischer, 1995, p. 56 on the concept of 'problem-solving collectives'.



**Virtual enterprises**

**Table 2:**



- c) concentration on the core skill;
- d) avoidance of institutionalising centralised management functions;
- e) legally independent entities;
- f) based on trust and a common business understanding;
- g) learning and adaptive orientation;
- h) decentralised organisation of the problem-solving group;
- i) no permanent location, existing only on the Internet/Intranet (great dependence on ICTs) (see Zmija, 1998).

Mertens and Faist (op.cit) found three different types of virtual enterprises in their field study (table 3). Crucial to the success of virtual enterprises is the trust factor. Even before the separate business partners amalgamate into a virtual enterprise, confidence-raising indicators from their working practices are necessary. For this reason the networking form defined by Mertens and Faist as Type A is a common variant. Under Type A, virtual enterprises are contabled on the basis of an already available pool of companies that already know each other, so that a certain level of trust among the business partners can be assumed. If a specific skill needed for solving the problem is unavailable or insufficiently available in this pool, a partner will be temporarily brought in from outside for the duration of the VE (Type B). Subsequent admission of this external partner into the pool is very likely if the cooperation is successful. Only rarely are virtual enterprises founded by partners who have had no previous relationship, so that no bond of trust has been able to develop (Type C).

standing. The cooperating entities participate in horizontal and/or vertical cooperation primarily with their core skills and act toward third parties as a single enterprise during the provision of the service. Institutionalisation of centralised management functions in the organisation, control and development of the VE is largely avoided and the required coordination and harmonisation covered by suitable ICT systems. The VE is bound up with a mission and ends when the mission is accomplished.'

Virtual enterprises can be illustrated diagrammatically as shown in table 2.

Virtual enterprises are characterised by:

- a) strong focus on finding solutions to specific problems (extremely client-oriented);
- b) temporary working organisation that breaks up after the problem has been solved;

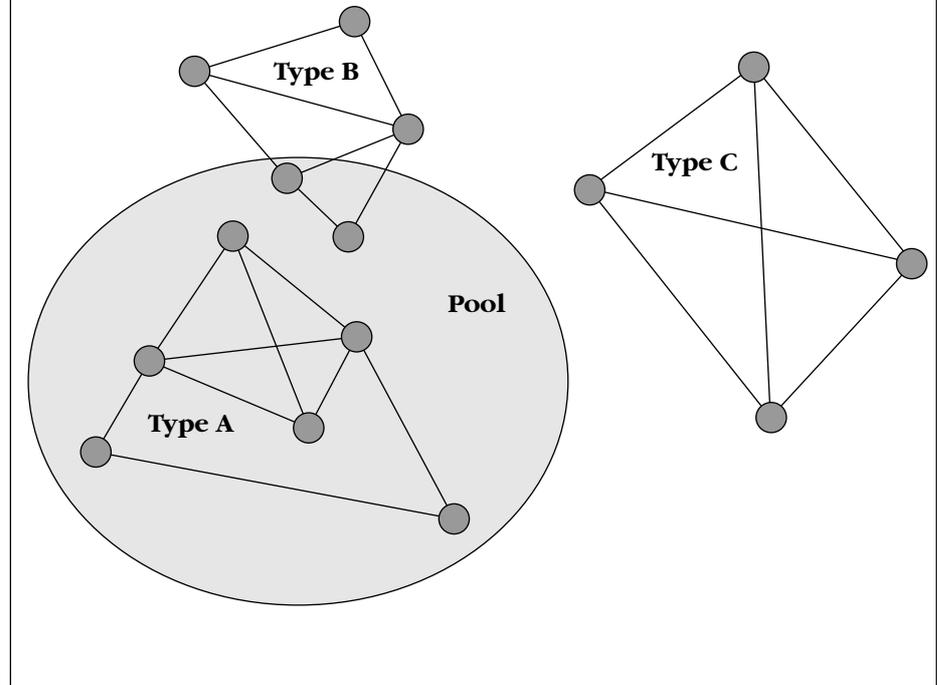
The trend towards virtualisation is being promoted by business start-up support schemes and existing businesses establishing offshoots. At the same time there is a trend towards smaller, usually independent or semi-autonomous business units. The development of existing software standards is strengthening the trend towards fewer software systems, and greater work force flexibility has become evident in recent times (Mertens and Faist, op.cit).



Restraining factors are also apparent. Contrary to the theories occasionally voiced by organisational theoreticians and practitioners, that in future large-scale enterprises will be the exception and networking alliances will be the rule, a growing trend towards large-scale enterprises and the associated effort to gain greater market power can also be observed (Mertens and Faist, 1997, op.cit). Factors that speak against virtual enterprises are:

- a) lack of long-term experience of those involved and therefore, lack of insight into the disadvantages of speed;
- b) lack of permanent commitment of specialists to an enterprise;
- c) stance of employees' organisations, which have a very sceptical attitude to this concept;
- d) complexity of virtual enterprises;
- e) obstacles that arise during the period of cooperation.

**Table 3:**  
**Types of virtual enterprises (see Mertens/Faist, 1997)**



## Problem areas

A Leonardo da Vinci project<sup>3</sup> examined the impact on vocational education in respect of the observations on virtual enterprises outlined above. Which skills are important in virtual forms of organisation, and particularly, in virtual enterprises? How should vocational education and training, particularly initial vocational training, be structured to meet the needs of the future?

### Skills

As is clear from the interpretations of virtual enterprises described above, a number of problem areas become apparent with regard to the requirements virtual enterprises place on vocational education and training. In the Leonardo da Vinci project ISIS these were identified as discussed below.

### Project work

During the implementation of a project, both the appropriate expertise and a multiplicity of different skills are expected and required from individual project mem-

bers. Interdisciplinary communication with partners for jointly defining and demarcating the areas of work is just as necessary as specialised knowledge and interpersonal skills for resolving problems. Participants must be equally familiar with project planning tools and with the procedures and rules for discussions, meetings and presentations.

Independent recognition of information and operational deficits and the resultant independent acquisition of the necessary information and knowledge are facilitated by projects and are, at the same time, a project objective.

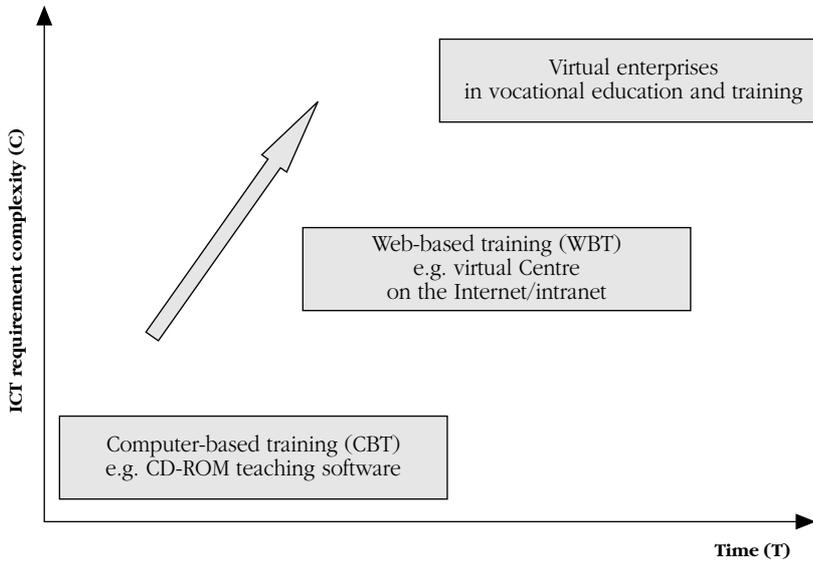
In all modern occupations, besides technical information and communication expertise, consultation and service provision are growing in importance. Specialists cannot create barriers by using jargon, but must recognise their client's problem and use their specialist skills to find appropriate solutions. Thus successful vocational training of the future must build a bridge between respective specialist competence and appropriate technical communication and commercial knowledge.

<sup>(3)</sup> Leonardo Project: 'Evaluation, Intervention and Transfer of the Leonardo Project 'Virtual enterprises in initial vocational training (ISIS)' – OSIRIS' headed by Prof. Dr.-Ing. Hans Martin, Institute of Industrial Science at the Comprehensive University of Kassel with project partners in Germany (HRM Consult, Hessisches Landesinstitut für Pädagogik), Greece (University of Thessaloniki) and Ireland (Cork Institute of Technology). Duration of the project 1997-2000.



**Virtual personnel training**

**Table 4:**



problems in interpreting information. An understanding of the other culture and its customs and manners prevents misunderstandings and irritation.

**Job-related skills**

VEs create new work forms and new workplaces. Work is decentralised, done from home or on the client's premises. Occasionally non-commercial workplaces, such as local teleworking centres or office hostelling, might even be established. Workers should therefore be familiar with labour law and health and safety standards. Relevant industrial safety regulations also apply in places of work outside actual company premises (e.g. regulation concerning VDU operator workstations).

Job descriptions and requirement profiles for particular jobs are not helpful in VEs since 'the' job in the narrow sense of the word no longer exists. The demands made on workers depend on the project. There is no job profile for a particular job since tasks are constantly changing according to project requirements. This results in constant training and continuing training which must be undertaken as required.

**Career development and continuing training**

Career development in VEs is not planned as a position in a hierarchy, but in terms of project history. Successful completion of a project leads to a higher rung on the ladder of success rather than being responsible for personnel or belonging to a company for a certain number of years. The configuration of the team is crucial to the success of VEs. Uniform standards with regard to training, methods and procedures and behavioural patterns should be specified. Team supervision is straightforward. This also results in changes in initial and continuing training. If traditional jobs are no longer relevant, traditional training makes little sense. Training must therefore also be project-related. Continuing training becomes individualised. People 'working for themselves' and core staff have to invest in themselves and continuously advance their own training. A substantial demand for continuing training is foreseeable.

How can this demand be met, or how should training and continuing training be organised in VEs?

Experience shows that in this day and age expertise becomes outdated at an ever increasing pace. As a result there is a urgent need for constant, flexible adaptation and lifelong learning.

**Information and communication technologies**

Due to the immense deployment of ICTs in VEs, workers in such organisations must have the appropriate skills. Apart from user skills, which these days are essential even in conservative organisational structures, knowledge on the networking of ICT systems is the key requirement. The Leonardo da Vinci ISIS project needed over a year to install the necessary technical infrastructure in all the participating institutions and schools, particularly in the German vocational schools. This indicates just how important it is to have not only good data-processing equipment, but above all, skills in handling and servicing ICTs.

**Internationalisation**

Besides technical specialist skills, language and intercultural skills are particularly important in transnational virtual enterprises. Cultural differences can lead to



**Organisation**

A possible solution is offered by the virtualisation of training and continuing training (table 4). This cannot and will not replace traditional training and continuing training, but will supplement it.

In the first place, suitable educational software has to be developed. Good computer-based training programs are already on the market. These can usually be installed locally on a PC, by CD-ROM. Content is adapted when the software is re-distributed. The learner can work through the program on a PC workstation with multimedia capability. The design of such systems requires a high level of didactic knowledge.

To meet the requirements of virtual enterprises, initial and continuing training should lose their stationary nature and likewise become networked. Web-based training concepts on the Internet or Intranet permit quick changes of educational content. Users can access the appropriate training program and work through the modules at any time and from any place where they have access to the Web. Intelligent use of the media capabilities to achieve the educational objectives are important for the success of these systems, too.

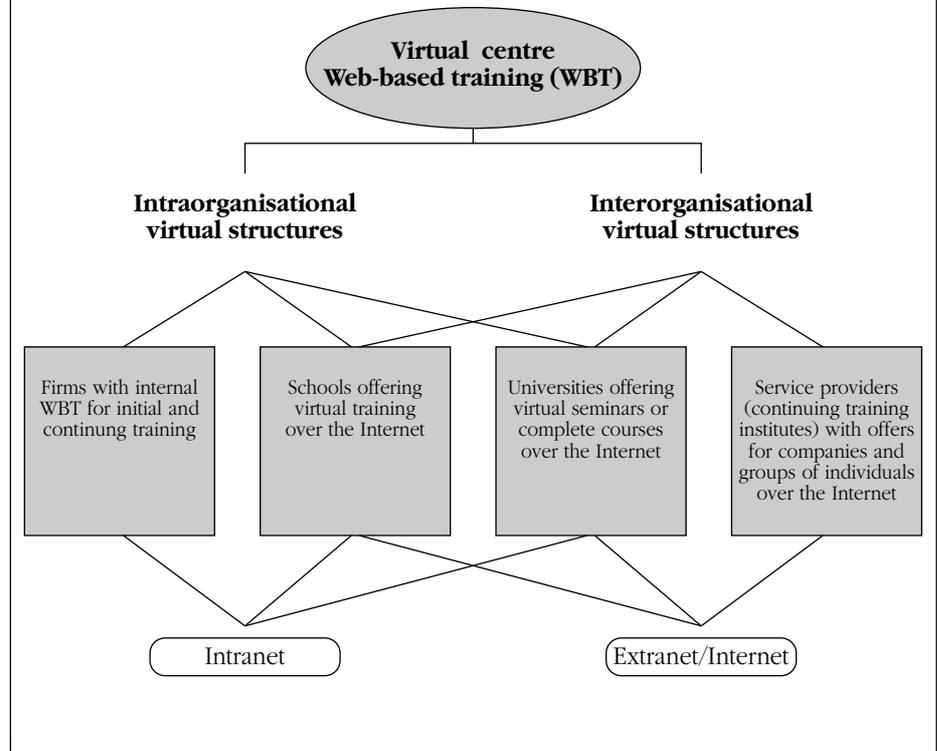
Virtual enterprises can also be organised in vocational education and training. At the initial stage, VEs of Type A are available. A virtual learning group in the sense of a virtual enterprise can be formed from a permanent pool of employees, continuing training participants, teachers and pupils. Each individual can formulate their learning needs on the virtual market or look for a supplier for their individual educational requirements. An expansion of this system to Type B or C is conceivable. Such structures, however, bring about a sharp increase in ICT requirements and consequently, are far more complex.

Various providers of virtual personnel training exist. These can be subdivided into intraorganisational and interorganisational virtual structures (Table 5).

Schools can offer courses on the Internet. It is conceivable that teachers make sup-

**Various forms of virtual learning centres**

**Table 5:**



plementary training material accessible to their pupils over the Internet. Users of such material could be pupils or other teachers. A Type A or B VE can evolve if pupils and teachers work together on the material as a team.<sup>4</sup>

Enterprises and companies are increasing their own web-based training for their own in-house and continuing training. Their target groups are clearly their own permanent staff. A Type A VE can develop.

Increasingly, service providers (usually continuing training institutes) are offering training to enterprises and groups of individuals over the Internet. Some enterprises are opening up parts of their internally developed web-based training modules to other enterprises or individuals. While this offer corresponds to a Type B VE, Internet service providers are more properly classified under VE Type C.

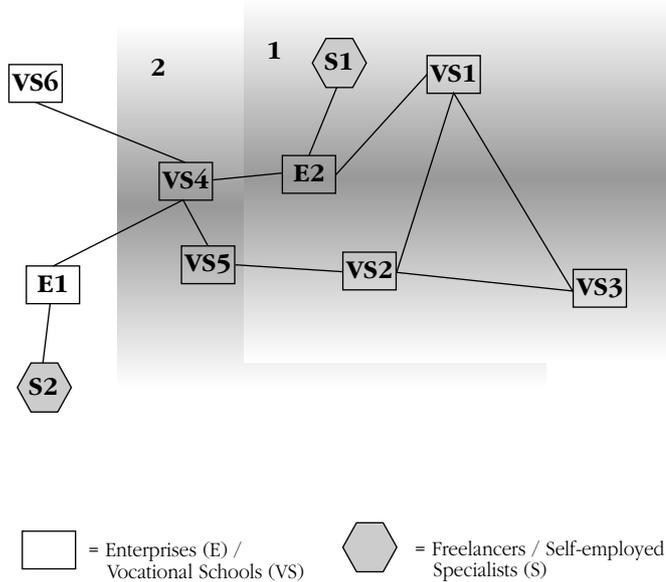
Universities are also developing virtual seminars or entire courses and offering them on the Internet. A mix of VE Types

<sup>(4)</sup> An example of this are the schools and educational institutions participating in the Leonardo Project 'Virtual Enterprises in Initial Vocational Training (ISIS)' in Germany, (Schulze-Delitzsch Schule, Wiesbaden; Max Eyth Schule, Alsfeld; Friedrich Ebert Schule, Wiesbaden), Greece (Chalkis College of Technology, Chalkis) and Ireland (Cork Institute of Technology, Cork). The ISIS Project is being scientifically monitored under the OSIRIS Project.



Table 6:

**Virtual enterprises in initial vocational training**



C) where they contribute their respective specialist skills. A project or a problem is advertised on the virtual market on the Intranet or Internet. This leads to the formation of a problem solution collective. Its composition depends on the problem to be solved (Table 6). All the necessary core skills are combined to carry out the project. Results are fed back to the alliance. When the project is finished, the group reconfigures and new virtual enterprises are formed.

This theoretical concept can be clarified using the example, 'Construction of a wind power station'. A class from a technical vocational school wants to build a wind power station. Much information is required to do this successfully. Marketing, design, production planning, accounting, cost-benefit analysis, sales and purchasing, all have to be considered. Questions arise that the class teacher probably cannot answer without outside help.

An action-based training project involving other classes would provide the solution. The project can now be advertised on the virtual market in a search for potential partners. A class from a vocational commercial administration school wanting to take part in the project turns up. A craft trade enterprise is also interested and promises its cooperation.

The next stage is founding the virtual enterprise. Tasks have to be allocated and the necessary communication structure specified. Information is exchanged between the project members. Finally the wind power station is built and the project is finished. The vocational commercial class now tries to set up a new alliance, because contacts have developed through this project and the new class topic, 'European payment transactions', is also to be tackled in the form of a virtual enterprise. A new alliance is forged.

The hypothetical case is no doubt incomplete and can certainly be extended. High demands are placed on teachers and pupils. Nevertheless, the experience of the Leonardo da Vinci project 'Virtual Enterprises in Initial Vocational Training (ISIS)' suggest that the innovative concept of virtual enterprises can be successfully implemented in vocational education and training.

A and C arises. This is organised internally within the university (Type A) or on an inter-university level (Type C), depending on the users.

All forms of virtual personnel training comply with the requirements of virtual enterprises. A high degree of networking by means of ICTs is necessary. Users become familiar with the required technologies and the core skills needed in virtual structures. Virtual teams are formed as learning groups and can employ the technical potential for optimising their work.

Virtual enterprises as an extreme form of interorganisational virtual organisational structures in vocational training have very specific requirements. Internal and external groups requiring vocational education disperse. Teachers, classes, pupils, school principals, external lecturers, enterprises and consultants join forces in a pool (Type A or B) or an open virtual market (Type



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# Vocational training for professionals in the field of equal opportunities for women

## Introduction

out “positive action” for the benefit of women.

Nine years later the situation has changed significantly. A number of surveys conducted within the framework of NOW Initiative (New Opportunities for Women – a Community initiative with the aim of developing equal opportunities between men and women, especially in the working world. The measures described here were co-financed by the Directorate-General for Women in the Community of Madrid.) have led to the recognition of the vocational profiles and access routes through vocational training. In general, the point of departure for these surveys was the systematic analysis of the occupations of equal opportunity professionals and a study of the training requirements. The outcome of this was the inclusion of the vocational profiles of officers (*agentes*) and advisers (*promotoras*) working in the field of equal opportunities for women in the National Classification of Occupations in Spain, and the introduction of standardised vocational training courses. In Spanish the feminine form of the term “equal opportunity promoter” or adviser (*promotora*) is frequently used because up to 1992-94 the majority of the persons carrying out positive actions in Spain were women. Towards 1999 about 10% of equal opportunity officers and advisers were men. These developments have probably occurred in other Member States too and can serve as an impetus for equal opportunity programmes run by public agencies, trade unions and some companies<sup>1</sup>. This article describes the process which led to this recognition. It also invites interested persons and organisations to join this initia-

**This article describes the process that led to the recognition of the vocational profiles and access routes for professional staff working in equal opportunities in Spain. It outlines the support provided through the NOW Community initiative, and encourages interested organisations and persons to join the initiative to promote transparency and approved certification across the EU in this field.**

In 1990 professional staff working in equal opportunities in Spain were given various titles such as socio-cultural promoters; community educators; trainers of adults and many more. The status of those responsible for positive action in the social services of the municipalities and public agencies was quite precarious and, on the whole, they were considered “social workers” or “teachers of adults”. “Positive action” is an attempt to prevent or rectify situations which lead to genuine inequality between men and women and imply gender discrimination (Bianca, 1987). As in other Member States of the European Union, positive action in Spain has a legal backing in the Constitution of 1978 (Articles 9.2. and 14) and in legal regulations. At that time there was no specific designation for them although it was a rapidly growing group (some 600 people) with a specific vocational profile directed at eliminating discrimination in the social, vocational and educational fields. On the other hand, the relevance of their work which consisted of implementing equal opportunity plans of public administrations, made it advisable to introduce recognition of access routes and specialisation through vocational training (see table 1).

In principle, it was assumed that equal opportunity professionals were working in “community services” and “adult education”; in other words, that this was a group of professionals similar to those working in the social and educational services, but there was no specific recognition of the profile of persons carrying

<sup>(1)</sup> The Spanish initiative received the specific support of the following institutions: Directorate-General for Women of the Community of Madrid; Institute for Women; the trade unions Comisiones Obreras and Unión General de Trabajadores; and several local corporations (Fuenlabrada and Coslada in Madrid; Pamplona, etc.)



tive so that “transparent” and “approved” vocational certification is established in all EU Member States.

## Occupations in the field of equal opportunity

In some European countries and the United States equal opportunity professionals have existed for some time carrying out positive action in various sectors: employment, education, citizen participation and other areas. The task of these professionals is to prevent gender discrimination and promote conditions to ensure genuine equality of opportunity. This growing desire to guarantee equal opportunity between men and women has led many countries to set up advisory services specifically for women. The emergence of vocational profiles linked to positive action is a response to the need for competent staff in this area. These profiles have several elements in common, but there are also some differences between the EU Member States arising from national specificities (Cedefop, 1986).

In France, workers in this field are called *conseiller(e)s d'égalité* (Equal opportunity advisers), *agents d'égalité* (Equal opportunity agents) and *responsables en égalité* (Equal opportunity officers). In Germany these occupations have been well defined for some time. Generally, the terms are *Gleichstellungsberater(r)* (Equal opportunity adviser) and *Gleichstellungsbeauftragte(r)* (Equal opportunity officer). In the UK this work is done by “Equal opportunity officers” and “Equal opportunity advisers”. In the Netherlands, the designation is *Emancipatiewerker* (Equal opportunity worker).

In Spain, the designations used for some years have been *Agentes de igualdad* (Equal opportunity officers) and *Promotoras de igualdad de oportunidades* (Equal opportunity advisers).

With respect to training these professionals, three trends may be identified which involve the training of human resources (in countries like the UK and Italy), preparation in the field of trade unions and collective bargaining (Italy, France, Germany) and integration in the working

**Table 1**

**In Spain the following terms employed in this article are in current use:**

**Vocational training:** this is technical training at secondary education level (after compulsory schooling, from 16 years of age) which is under the responsibility of the education authorities and structured in two study cycles corresponding to European Union levels 2 and 3. The vocational certificates obtained here are valid throughout national territory.

**Occupational training:** this is short-cycle technical training which is given to persons who are unemployed or wish to improve their qualifications. This training is free of charge and, in Spain, is administered by the labour authorities (Ministry of Labour and Social Security) and the regions or Autonomous Communities.

**Certificate of Occupational Proficiency:** accreditation for the exercise of a profession which is valid throughout national territory and which is acquired after completing a standardised training programme; these programmes are usually composed of a series of “credit units”.

**National Classification of Occupations:** official register of all occupations existing in Spain which is used for statistical purposes and for management of employment. The Spanish classification dates from 1994 and is similar to the International Standard Classification of Occupations of the International Labour Organization (1988).

**Higher Council for Statistics:** a government organisation which, in Spain, is entrusted with the periodical updating of the National Classification of Occupations.

**Employment Offices:** local agencies of the public employment service of the State (INEM) and the regional authorities.

**Occupational models:** technical sheets drawn up by the public employment service which describe the basic contents and requirements of an occupation.

**Standardised course programmes:** technical training programmes designed on the basis of a minimum standardised curriculum which is the same all over the country. These programmes can be adapted to the specific needs of different markets or geographical zones.

**Initiation programmes (“broad-based”):** training courses which transmit the basic initial contents for the exercise of an occupation.

**Specialisation programmes:** training courses for persons possessing the basic knowledge and skills required to exercise an occupation. In the case of university graduates they are also called very high level courses (Muy Alto Nivel -MAN).

**University diploma:** university education with a duration of three years equivalent to European Union Level 4.

**University degree:** university education with a duration of five years equivalent to European Union Level 5.

In Spain, vocational training consists of two cycles of technical studies which follow compulsory secondary schooling; they are equivalent to Levels 2 and 3 of the European Union and fall under the responsibility of the education authorities. Occupational training, on the other hand, consists of short technical specialisation courses designed for unemployed persons and other target groups and is the responsibility of the labour authorities, that is, the employment services and regional training/employment agencies (see attached figure)



Table 2

## Officer for equal opportunities for women

### Description of the occupation

The Equal opportunity officer (*Agente de igualdad de oportunidades*) has the task of coordinating, initiating and implementing positive action plans for equal opportunities in the fields of education, vocational training and employment, culture, leisure-time, well-being and, in general, all forms of citizen participation, including representation in public bodies.

### To achieve this, the officer:

- advises the administration, social partners, companies and non-governmental organisations on equal opportunity initiatives and legislation,
- coordinates, supervises and participates in the preparation of pre-training and vocational guidance measures, implements training/employment schemes directed in particular to disadvantaged groups,
- collaborates with local departments for social welfare, employment, youth, health and other sectors to prevent and rectify situations leading to disadvantages for women or their marginalisation,
- initiates and promote awareness campaigns to change discriminatory and stereotyped sexist attitudes in the community,
- designs, implements and evaluates positive actions and plans for equal opportunity, coordinating the activities of the different bodies and agents involved,
- acts as an intermediary between the administration, women's groups and social partners in all matters relating to equal opportunity in the community.

### Training and suitable profile

Although there is a tendency in EU Member States to recruit professionals with higher education in the social sciences or with comparable certificates (European Union Levels 4 and 5), this occupation can also be exercised competently by persons with other types of education who have ample experience and training in the field of equal opportunities. Qualities such as a well-balanced approach, sociability and empathy plus the ability to manage projects and coordinate teams, are considered to be indispensable. A specifically sensitive understanding of the problems of traditionally disadvantaged groups – in particular women – is a basic pre-requisite for the exercise of this occupation.

quired to develop positive action in different contexts. However, there were no signs of attempts in these countries to make this basic training uniform by establishing a standardised and nationally valid curriculum. In this connection the Spanish movement is more specific because it has the explicit objective of future vocational certification which is supported by the labour administrations and can be identified and valued as such by the employees.

## Analysis of the vocational profiles

Against this background a group of analysts from the School for Labour Relations of the Complutense University of Madrid embarked in 1992 on the task of studying the profile of equal opportunity professionals in Spain to add it to the National Classification of Occupations. The plan was to make this part of a NOW programme run by the Directorate-General for Employment and Social Affairs of the European Commission and co-financed by the Structural Funds. This programme has the specific objective of identifying the persons who, in Spain, have vocational functions linked to equal opportunity, and designing a standard vocational training programme backed by the public employment services. In addition, it was also planned to present a proposal to the Spanish National Institute for Statistics on the recognition of these profiles because this study took place at the same time as the establishment of the National Classification of Occupations (1994).

To prepare the technical description of the profiles for Equal opportunity officers and advisers, a team from the School for Labour Relations drew up the questionnaire entitled PAIO<sup>2</sup> which served as the basis for structured interviews to collect data on the content of the occupations. Basically, it adopted a methodology similar to the one recommended by the International Labour Organization (1988) for the studies on the vocational description of jobs (i.e., description of general functions, specific tasks and activities and concrete duties). The questionnaire was sent to about 200 professionals and their direct superiors in the

world and career development of women (in Portugal, Greece, Germany, Spain). In this context, the training programmes in Spain are similar to some multi-skilling initiatives conducted recently in some German *Länder*, and the Netherlands. These initiatives took the form of "broad-based" training programmes, not confined to specific fields such as personnel management or vocational guidance, but covered a broad range of competences re-

(<sup>2</sup>) PAIO/Perfil Profesional de Agentes de Igualdad de Oportunidades (Occupational Profile for Equal Opportunity Officers); School for Labour Relations of the Complutense University of Madrid, 1992.



whole of Spain. The following results were obtained from this survey conducted between 1992 and 1994.

The initial assumption by the researchers of the existence of two different profiles within this professional field, was confirmed. One concerns functions relating to planning, advice to high-level technical and political persons, and evaluation of the programmes. These functions correspond to the activities of persons with university education and several years of experience. In line with other countries (Cedefop, op. cit. 1986) this profile was designated "Equal opportunity officer" (*Agente*). The functions of the second vocational profile concerned activities for the users of services for women, plus promotion of awareness campaigns, schools for adults, etc. This profile more or less corresponds to professionals with non-university training and was given the designation of "Equal opportunity adviser" (*Promotora*).

Although the two profiles are quite different, there is a certain amount of overlapping, especially with regard to tasks involving advice to women in specific target groups (for example, jobseekers, abused women, etc.); in other words, there is a certain continuity in the duties of Equal opportunity officers and advisers.

On the basis of the above data, two technical sheets were drawn up which give a summary of the results of the survey (see tables 2 and 3).

## Recognition in the National Classification of Occupations

In 1994, the results of this work were presented the Higher Council for Statistics with the aim of getting these two occupations incorporated in the National Classification of Occupations, an official document listing the main occupations of each country. This proposal was accepted in the course of the updating carried out between 1992 and 1994<sup>3</sup>. The Spanish public employment service (INEM) also included these two profiles in its own

### Adviser for equal opportunities for women

Table 3

#### Description of the occupation

The adviser is the person who, in collaboration with the officer for equal opportunities for women, or with the responsible person in the Department for Women, initiates and coordinates various positive actions in direct contact with women, women's associations and other organisations involved in equal opportunity issues.

#### To achieve this, the adviser:

- carries out tasks relating to reception, information and guidance in the advisory centres, women's shelters and other services established for women, including social and community services,
- participates directly in the monitoring of activities for women in the areas of pre-training, education, vocational training, vocational guidance, health, culture, etc.,
- advises and supports groups and associations with regard to services, resources and activities relating to women,
- provides training and guidance for social workers, undertakes educational and health activities,
- advises and informs companies and organisations on measures for positive action (subsidies, training and re-training aids, etc.), and on questions relating to equal opportunities for women and men,
- gives advice and cooperates in programmes and initiatives of the Council and the Commission for Women, etc.,
- collaborates in other tasks relating to the design, management and evaluation of positive actions in the local environment, and investigates inequalities to women.

#### Training and suitable profile

Given these functions, it is considered appropriate to have a level of basic training equivalent to European Union Levels 2 and 3 (secondary education), even though this occupation can also be exercised by persons with experience and training in direct work with women. Additional training and experience in the field of positive action are highly recommended. . A specifically sensitive understanding of the problems of traditionally disadvantaged groups – in particular women – is a basic pre-requisite for the exercise of this occupation.

Classification of Occupations in 1997. This means that all Equal opportunity officers and advisers in Spain are included in all statistical surveys, and that persons who wish to take up employment in this field can register themselves for this occupation in an Employment Office.

The next step, undertaken between 1998 and 1999, was to establish standardised

<sup>(3)</sup> Equal opportunity advisers, code number 2939 of the National Classification of Occupations of Spain (1994), page 160; and Equal opportunity officers, code number 3539; *ibid.* page 201.



Table 4

## Summary of the programme for Equal opportunity officers, 1999

**Training family: Community and personal services**

**Specialism: (Title of the course) Officers for equal opportunities for women**

**Recommended duration:** 270 hours

**No. of trainees:** 15

**Level:** Occupational (MAN)<sup>5</sup>

**Reference in the National Classification of Occupations:** 2939 (page 160)

### General objectives:

After completing the course the participant should have attained the level of knowledge and skills required to perform the following tasks:

- advise the administration, social partners, companies and others on equal opportunity initiatives and legislation,
- design, implement and evaluate positive actions and plans for equal opportunity, while coordinating the work of the different bodies and agencies involved,
- act as an intermediary between the administration, women's groups and social partners in all matters relating to equal opportunity.

### Access requirements:

University degree or diploma (preferably in the Social Sciences)

No prior technical knowledge required.

### Contents: (thematic blocks)

- strategies for the detection and prevention of discrimination
- techniques for the planning, development and evaluation of positive action
- advisory and consulting techniques
- negotiation and communication techniques
- intervention in specific contexts.

introductory or "broad-based" programmes were established (1987-1992) and a second phase in which specialisation was introduced (1993-1999). However, these training programmes do not make a clear distinction between the two profiles described in the National Classification of Occupations of 1994.

To achieve the objective of the standardised course programmes, the starting point taken was a description of the two vocational models which reflect the competences required for the two profiles. To this end, Equal opportunity officers and advisers were interviewed from 1992-94, and another questionnaire prepared on initial and continuing training needs. This questionnaire grouped the training areas along the lines of the functional categories established in the previous study and assumed two levels of training: one specialisation course at Level 4/5<sup>4</sup> for Equal opportunity officers and another at Level 3 for Equal opportunity advisers. The responses to this questionnaire were completed by a Delphi group consisting of specialists from equal opportunity organisations, local authorities and trade unions. They form the basis for the two model standardised courses whose technical features are summarised in tables 4 and 5.

## Towards the Certificate of Occupational Proficiency

Finally, the standardisation of vocational training takes us to the third objective of this project the recognition by the Ministry of Labour and Social Security in Spain of the Certificate of Occupational Proficiency for Equal opportunity advisers<sup>5</sup> and the creation of a model of instruction in vocational training which, in Spain, is under the responsibility of the Ministry of Education and Culture and the regions which benefit from the effects of large-scale decentralisation. In Spain, the Directory of Certificates of Occupational Proficiency is the basis for the system of validation and recognition between vocational training which is the responsibility of the education authorities and occupational training which is under the responsibility of the labour authorities, two streams traditionally separate from each other. At present, the team of specialists

<sup>(4)</sup> Reference codes for the system of vocational qualification levels established by the European Union.

<sup>(5)</sup> The case of the Equal Opportunity Officers is different because it concerns a profession which requires previous university education at the university diploma level (that is, at qualification level 4 of the European Union) or the university degree or related level (level 5).

course programmes which would lead to the recognition of vocational training courses which had existed nationwide for many years. Initially launched by the Institute for Women of Spain, and then extended to several autonomous communities, these special programmes made it possible to train more than 600 women between 1987 and 1999. Part of these programmes is subsidised by the Spanish public employment service which recommends the standardisation of the curricula. Generally speaking, there were two phases in the development of these programmes: a first phase in which many



Table 5

## Summary of the programme for Equal opportunity advisers, 1999

**Training family:** Community and personal services

**Specialism:** (Title of the course) Adviser for equal opportunities for women

**Recommended duration:** 270 hours

**No. of trainees:** 15

**Level:** Occupational

**Reference in the National Classification of Occupations:** 3539 (page 201)

### General objectives:

After completing the course the participant should have attained the level of knowledge and skills required to perform the following tasks:

- receive, inform and guide women in the advisory centres, women's shelters and other services established for women,
- participate in activities for women in the areas of pre-training, education, vocational training, vocational guidance, health, culture, etc.,
- advise and support groups and associations with regard to services, resources and activities relating to women.

### Access requirements:

Hold a secondary education certificate or, failing that, have experience of work in advisory activities for women or socio-cultural promotion.

No prior technical knowledge required.

### Contents: (thematic blocks)

- strategies for the detection and prevention of discrimination
- reception and follow-up techniques
- training of trainers for positive actions
- efficient presentations
- intervention in specific contexts

in the School for Labour Relations is continuing the work which can lead to the approval of this certificate. This team has, however, indicated that the vocational profiles of Equal opportunity officers and advisers contain other competences which cannot be acquired through formal qualification and which have to be taken into account in selection processes for example, maturity, previous experience of work with women, affinity with people, etc. These characteristics are the basis for a "vocational model" designed recently

within the framework of the NOW initiative following the specifications of the Spanish public employment service.

## Summary and outlook

The work undertaken on the vocational recognition of Equal opportunities officers and advisers is an example of how vocational training experts contribute to the development of positive action in the



EU. In 1994, a detailed study of the work of equal opportunity professionals led to the official recognition of these two occupations in the National Classification of Occupations in Spain. Subsequently, the study on “vocational models” and training needs became the basis for the two standardised vocational training programmes and the future certificates of vocational proficiency. In practical terms this means that the persons working in the field of equal opportunity succeeded

in obtaining recognition by the public administration. There were two reasons for this, firstly, the technical work and secondly, the mobilisation of women’s organisations and associations throughout the country. This mobilisation was important as it provided the support of equal opportunity organisations, local and regional institutions and the leading trade unions. As this is a pioneer initiative launched by the EU, efforts are being made to spread it to other countries.<sup>6</sup>

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<sup>(6)</sup> For exchange of information on this subject, we would request you to contact Julio Fernández/Luis Aramburu. Escuela de Relaciones Laborales Universidad Complutense de Madrid. C/San Bernardo, nº 49; 28015 Madrid. Spain. E-mail: [psdif07@sis.ucm.es](mailto:psdif07@sis.ucm.es) and [aramburu@correo.cop.es](mailto:aramburu@correo.cop.es) Initiatives to undertake joint action relating to equal opportunity professionals in the Member States of the European Union will be welcomed.

## Europe International

### Information, comparative studies

#### Competence development and learning organisations: a critical analysis of practical guidelines and methods/ Ulrica Löfstedt.

In: Systems research and behavioural science, 18 (2001), p. 115-125  
New York: John Wiley, 2001  
ISSN 1099-1743

In critically analysing eight research papers about competence development in organisations, it is found that systemic models, methods and approaches have a great deal to offer in the field of competence development in SMEs. However, the proposed methods and approaches are still rather tentative and theoretically based. Hence, they need to be further empirically tested and adapted to practical use. It is also desirable to further develop and elaborate all the ideas raised in the papers in order to bring them to full maturity. Finally, in order to meet all the requirements in the European Commission's ADAPT programme, further research and development is needed concerning how to combine and extend the original methods discussed in this analysis.

#### Lifelong Learning and the new educational order/Field, John.

London: Trentham Books, 2000, XII + 181 p.  
ISBN 1-85856-199-X

This volume consists of five chapters. Chapter 1, 'Lifelong learning: a design for the future?', focuses on the concept, policies to implement and the context in which the concept and policies operate. Chapter 2, 'The silent explosion', is based on Field's belief in 'the fundamental, underlying shift in the behaviour of ordinary citizens.' Chapter 3, 'The learning economy', addresses an area to which the concept of lifelong learning is most easily and frequently applied, i.e. the workplace. Chapter 4, 'Who is being left behind?' returns to a point he has already noted and stresses

the role that education has, and lifelong learning may, contribute to the 'exclusion' of large groups within society. In the first four chapters, Field has established the base for his strategies noted in chapter 5, 'The new educational order'. In the complex contemporary world there is no single (or simple) answer. Rather, he offers four plus one strategies to move towards his desired new educational order: rethinking the role of schooling; widening participation in adult learning; building active citizenship by investing in social capital; pursuing the search for meaning; plus balancing individual goals with environmental responsibility.

#### Creative and inclusive strategies for lifelong learning: Report of the International Roundtable 27-29 November, 2000/editors Gillian Youngs, Toshio Ohsako and Carolyn Medel-Añonuevo.

United Nations Educational, Scientific and Cultural Organisation - UNESCO, Institute for Education - UIE  
Meeting International Roundtable, Hamburg, 2000  
Imprint Hamburg: UIE, 2001, 124 p.  
ISBN 92-820-1110-0

The Round Table was proposed within the framework of UIE's programme Cluster 1: 'Learning Throughout Life in Different Cultural Contexts: From Laying Foundations to Strengthening Participation'. It is also a follow-up to the 'Global Dialogue 7: Building Learning Societies: Knowledge, Information and Human Development', held at EXPO 2000 (6-8 September 2000, Hanover, Germany). It will also constitute an exploratory stage in the formulation of a UIE-led and coordinated follow-up activity area to the World Education Forum (WEF, Dakar, April 2000).

#### European Union: policies, programmes, participants

#### Memorandum from ETUC, FGTB and CSC to the Presidency of the European Union.

Brussels: ETUC, 2001, 18 p.

### Reading selection

*This section has been prepared by*  
**Anne Waniart,**  
*and the Documentation Service with the help of members of the national documentation network*

*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.*



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URL: <http://www.etuc.org/>

The ETUC (European Trade Union Confederation), the CSC (Confédération des Syndicats Chrétiens) and the FGTB (Fédération Générale du Travail de Belgique) hope that the Belgian Presidency will manage to develop the European social model through the Social Dialogue and European macroeconomic dialogue. Our organisations also want the national social partners to be given a bigger role. The trade union organisations therefore think that the Belgian Presidency and the Commission should jointly set up a European Social Dialogue Summit.

**Euromosaic: support from the European Commission for measures to promote and safeguard regional or minority languages and cultures.**

European Commission, Directorate-General for Education and Culture  
Luxembourg: EUR-OP, 2001  
ISBN 92-821-5512-6

*Abstract available in all EU languages  
on the Europa site: <http://europa.eu.int/comm/education/langmin/euromosaic.html>*

The study is based upon a theoretical perspective, which considered the various social and institutional aspects whereby a language group produces and reproduces itself. This involved focusing upon seven central concepts for which empirical measures were sought. The primary agencies of these processes were identified as the family, education and the community. The motivating force involved the concept of language prestige, or the value of a language for social mobility, and cultural reproduction. The link between ability and use related to the concepts of institutionalisation and legitimisation. The Euromosaic report deriving from this study produced by the Institut de Sociolingüística Catalana (Barcelona), Centre de Recherche sur le plurilinguisme (Brussels), and Research Centre Wales (Bangor), highlights the shift in thinking about the value of diversity for economic

deployment and European integration. It argues that language is a central component of diversity, and that if diversity is the cornerstone of innovative development, then attention must be given to sustaining the existing pool of diversity within the EU.

**Kalif: to share is to multiply.**

CIBIT  
European Consortium for the Learning Organisation - ECLO  
Utrecht: CIBIT, 2001, 75 p.  
ISBN 90-75709-10-2

The European Commission supports the development of a networked knowledge infrastructure for 16 ESPRIT projects, known as KALIF (Knowledge and Learning Infrastructure). This project was launched in late 1998 and aims to provide a knowledge management and organisational learning framework for the 16 projects supported by the new EU Esprit thematic programme, IT and Learning for Industry. The aim of the project is to apply principles and concepts involved in organisational learning to an entire EU programme. This innovative project will seek to establish an effective learning environment for both the EU, the research & development projects involved in the programme and its two principle partners and the members of their respective networks. The project also seeks to establish three user groups of industrialists interested in the subject of the programme to examine the potential broader exploitation of the projects under development.

**Occupational safety and health and employability programme and experience.**

European Agency for Safety and Health at Work  
Luxembourg: EUR-OP, 2001, 214 p.  
ISBN 92-95007-18-2  
Cat. No TE-33-00-502-EN-C

This report gives an overview of the different types of initiatives in the Member States that aim to increase the employability of workers by using interventions deriving from the field of occupational safety and health. Twenty-six case studies from 13 Member States highlight the potential role of occupational safety and



health to improve the employability of workers, including prevention programmes and programmes aimed at (re)integrating specific groups at work.

URL: <http://agency.osba.eu.int/publications/reports/employability/>

**Second chance schools: dissemination conference: passing the torch to the Grundtvig programme.**

Brussels: European Commission - Directorate-General for Education and Culture, 2001, 108 p.

*European Commission - Directorate-General for Education and Culture, Rue de la Loi 200/Wetstraat 200, B-1049 Bruxelles/Brussel, Tel. (32-2) 2991111,*

URL: [http://www.europa.eu.int/comm/dgs/education\\_culture/index\\_en.htm](http://www.europa.eu.int/comm/dgs/education_culture/index_en.htm)

Available in: EN and FR

On 10 and 11 May 2001, the Municipality and the Second Chance Schools of Norrköping organised, with support of the Swedish EU Programme Office and the European Commission, a conference to disseminate results of the Second Chance Schools pilot projects. This conference was supported by the SOCRATES-GRUNDTVIG programme, which will now become an important vehicle to carry the message of the Second Chance Schools forward. Some 120 participants from 19 European countries participated, these included National Agencies of the Grundtvig programme, interested local authorities and agencies, as well as the European Parliament and the Swedish Education ministry and the Swedish teachers union. This conference underlined the success of the pilot phase - as well as the strong interest to continue with the projects, to create more linkages and to get more schools, cities and countries involved. It was for the first time in the short history of the Second Chance Schools scheme that the idea was presented to non-EU countries such as Iceland, Norway, Bulgaria, the Czech Republic, Latvia, Romania, Slovakia and Poland.

URL: <http://europa.eu.int/comm/education/2chance/report.pdf>

**Study on the State of Young People and Youth Policy in Europe.**

European Commission, Directorate-Gen-

eral for Education and Culture  
IARD

Luxembourg: EUR-OP, 2001, 156 p.  
Available in all EU languages.

Within the framework of the 'Youth for Europe' programme, DG EAC commissioned a 'Study on the State of Young People and Youth Policy in Europe' from the IARD Institute (Milan). This study is the outcome of the active collaboration between European research institutes in the 15 member states, Liechtenstein, Norway and Iceland. The work is divided into three main sections: the first one is dedicated to the conditions of youth in all 18 European countries; the second one is about youth policy in the same countries; the last section deals with 'Education and Training of Youth workers in Europe'. The impressive study identifies the main problems and challenges faced by the young generations, then it focuses on some particular issues such as education and training, labour market, well-being, health and values, organisational and political participation and the 'European dimension'. It contains general and national reports on each of the three above-mentioned focal points and provides some additional policy reflections and recommendations to help foster initiatives in the Youth field.

URL: [http://europa.eu.int/comm/education/youth/studies/iard/summaries\\_en.pdf](http://europa.eu.int/comm/education/youth/studies/iard/summaries_en.pdf)

**Training needs of investment analysts.**

European Commission, Directorate-General for Enterprise

Luxembourg: EUR-OP, 2001, 48 p.

ISBN 92-894-0632-1

Catalogue No. NB-NA-17031-EN-C

A report commissioned by the Directorate-General for Enterprise reveals that in today's Europe there is a real need for relevant training for investment analysts in three main areas: entrepreneurship, trends and evolution in technology, and basic technology theory (understanding the technical basis of technology). The report recommends that, at university level, more institutions should follow the examples of schools such as Insead, the London Business School and IMD, Switzerland, in setting up programmes on these subjects. It suggests that, as these are new subjects, they could be taught



by professionals from the infotech industry. It also suggests that courses could be set up by venture capital associations to develop the interests of the sector. The report goes on to recommend that industry associations set up programmes specifically related to: new trends in tech-

nology/market, basic technology in language understandable to non-technical analysts, growth stock valuation and valuation problems. Finally, because new technologies are by nature rapidly evolving, courses should be up-dated as often as possible.

## From the Member States

### **A** Exploiting the achievement of Leonardo da Vinci in Austria: a report on a series of seminars of the Leonardo da Vinci National Agency Austria.

Leonardo da Vinci Nationalagentur Österreich  
 Vienna: Österreichischer Akademischer Austauschdienst, 2001, 315 p.  
*Leonardo da Vinci Nationalagentur Österreich, Schottengasse 7/5, A-1010 Wien, Tel. (43-1) 5324726, Fax (43-1) 532472680, E-mail: info@leonardodavinci.at, URL: http://www.leonardodavinci.at*

During the year 2000 the results of the first phase of the Leonardo da Vinci programme in Austria were discussed in an exchange of views in order to elucidate considerations on the programme's sustainability at the national level and draw up prospects for the implementation of the programme's second phase in Austria. This project, which was initiated and supported by the European Commission throughout the EU with the aim of valorising the first phase of the Leonardo da Vinci programme began in Vienna in February 2000 as part of a series of seminars. It culminated in an international valorisation conference held in Salzburg on 16 June 2000. The specialist seminars focused on three main subject areas: the dual education system, continuing vocational training and linguistic skills.

### **D** Innovative Ansätze beim Lernen durch Arbeit und bei beruflichen Prüfungen: Sechs Fallstudien als Basis zur Entwicklung eines Instrumentariums zur

### **Beobachtung von Innovationen in Europa.**

#### **[Innovative approaches in on-the-job learning and in vocational examinations:**

#### **Six case studies as a basis for the development of a set of instruments for observing innovations in Europe]**

Grünewald, Uwe [et al.]  
 Bundesinstitut für Berufsbildung - BIBB  
 Berichte zur beruflichen Bildung, vol. 238  
 Bielefeld: Bertelsmann 2000, 128 p.  
 ISBN: 3-7639-0910-9

The six case studies presented here are a part of the results of a project financed by the European Commission which had the aim of analysing innovative approaches in the educational sector in terms of their suitability as models, and presenting them as 'good practice'. The volume deals with two areas: firstly, learning in the workplace and how to use the learning potential of on-the-job practice, and secondly, the innovations in the German examination and certification system. Both areas are relevant for future development as they deal with learning processes which lie beyond the classical forms of learning (instruction, seminars). Examinations and certificates are directly connected with concrete requirements in the work process. The case studies highlight the perspectives and problems of innovative approaches.

### **Förderung von Benachteiligten in der Berufsausbildung.**

#### **[Promotion of disadvantaged persons in vocational education and training]**

Büchel, Dieter-August [et al.]  
 Bundesinstitut für Berufsbildung - BIBB  
 Bielefeld: Bertelsmann 2000, 120 p.  
 ISBN: 3-7639-0920-6



This publication presents some of the entries in 2000 for the Hermann Schmidt Prize organised annually by the Verein Innovative Berufsbildung (Association for Innovative Vocational Education and Training). In 2000 the theme of this competition on vocational education was 'Promotion of disadvantaged persons in vocational education and training'. The theme covered activities for the preparation, ongoing support and implementation of apprenticeship contracts which would lead to a recognised certificate as laid down in paragraph 25 of the Vocational Training Law/Crafts Code, the overall goal being the sustainable integration of disadvantaged persons in society and working life. The selection and classification of the entries were undertaken according to the key factors involved in the promotion of disadvantaged persons. Concepts which address vocational choice and training routes are presented. They are followed by other contributions relating to sectors or regions, suggestions for the support programme, the design of qualification measures and training periods, and end-of-training and post-training action.

**DK Erfaringer fra forsøg med eud-reformen: grundforløb og hovedforløb i 2000. [Experiences from experiments with the vocational training reform: basic and main courses in 2000].**

Shapiro, Hanne  
Undervisningsministeriet, UVM; Uddannelsesstyrelsen  
(Uddannelsesstyrelsens temahæfteserie nr. 11 -2001)  
Copenhagen: UVM, 2001, 136 p.  
ISBN: 87-603-1988-7

In March 1999, the amendments to the Act on Vocational Education and Training were adopted. As a consequence, the basic organisation of technical VET programmes underwent substantial changes in order to create a more open, flexible and transparent structure. These changes were implemented in January 2001. Prior to the implementation, a number of development projects were initiated at technical colleges all over Denmark. This publication describes the development projects managed by the Danish Technological Institute. The report deals with the

following themes: the organisational framework for the reform, the educational intentions in the reform, new teacher roles and tools, enterprise knowledge of the reform, and the problem of drop-outs.

**Om erhvervsakademiuddannelserne: 6 tv-programmer: vejen videre. [About short-cycle higher education at vocational schools: 6 television programmes].**

Copenhagen: DR, 2001. videocassette, 160 min.  
*DEL,*  
*Rosenørns Allé 31,*  
*DK-1970 Frederiksberg C*

In 2000, the reform of short-term higher education was implemented. The aim of the reform is to ensure broad and more trenchant education programmes that can compete with other further education programmes in attractiveness. For this purpose, the number of programmes was drastically reduced from 75 programmes to 15 programmes of which 13 were entirely new. This videotape presents all the new vocational academy programmes (as they are called) with regard to both content and structure. The programmes ensure both vocational skills and preparation of students for higher education.

**E Guía de formación profesional en España. [Guide to vocational education and training in Spain]**

Instituto Nacional de las Cualificaciones, INCUAL  
Ministerio de Trabajo y Asuntos Sociales, MTAS  
INCUAL, 2001, 176 p.  
*INCUAL,*  
*Rafael Calvo 18,*  
*E-28010 Madrid*

Report on the vocational education and training system in Spain with four chapters presenting a complete description of the sub-systems that constitute the overall system: the first chapter deals with regulated vocational training or initial training and presents the legislation, forms of access, etc., the 'social guarantee' programmes (to help those who leave school with no qualifications to enter working life) and special training courses (instruc-



tion in arts, plastic arts, language and sports). The second chapter describes occupational vocational training, its legal provisions, the planning of training measures and certificates; this includes the programmes for Training Workshops and Crafts Training Centres and continuing vocational training (financing, management, agreements with social partners and the Foundation for Continuing Training - FORCEM). The third chapter deals with training provided by various bodies belonging to the labour or education administrations, plus training for maritime occupations, agricultural training and training in the armed forces. The last chapter shows, in the form of tables, the current situation of administrative vocational training structures and the bodies involved in planning and management; it also deals with the transparency of qualifications taking the European Union as the frame of reference. The report concludes with the National Classification of Education (CNED-2000).

**F Les enjeux d'une refonte de la formation professionnelle continue: bilan pour un futur.**

**[The key factors involved in the re-organisation of continuing vocational training: an assessment for the future]**

Lichtenberger, Yves, Méhaut, Philippe

*MEDEF,*

*31 avenue Pierre 1er de Serbie,*

*F-75784 Paris Cedex 16,*

*<http://www.medef.fr>*

This report which is intended for the social partners participating in the negotiations on the continuing vocational training system, presents an assessment and elements of analysis for future discussions. A series of documents, some already published, contain 12 annexes on the following themes: labour market, development and outlook – changes in work, competence and key factors of training – demographic trends – efficiency of training for individuals and enterprises – evolution of training, links with working hours - financing, structure of expenditure, sectoral differences, non-training companies – mutual benefit associations, the role of the Approved Joint Collection Agencies (OPCA) – the individual and lifelong learning – access of individuals, personal training leave (CIF), training time capital

(CTF) - certification and validation of non-formal learning – initial training, access of youth to employment and alternance training, the dynamics of collective bargaining.

**Evaluation du programme Leonardo Da Vinci I en France de 1995 à 1998.**

**[Evaluation of the Leonardo Da Vinci I programme in France from 1995 to 1998]**

Gartiser-Schneider, Nathalie

Institut de Recherche et d'Analyse des Dynamiques Economiques et Spatiales – IRADES

Bureau d'économie théorique et appliquée - BETA

Marseille: CEREQ, 2001, 124 p.

Documents CEREQ, série évaluation, 154 ISBN 2-11-091-413-0

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*10 place de la Joliette,*

*BP 21321,*

*F-13567 Marseille cedex 02,*

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*E-mail: [cereq@cereq.fr](mailto:cereq@cereq.fr),*

*URL: <http://www.cereq.fr>*

This document is a sequel to the first report on the implementation of the Community action programme Leonardo da Vinci I (CEREQ Documents No 127, October 1997). It presents an initial assessment of the results achieved. Although the sponsors of projects state that they are generally satisfied with what they were able to achieve, the dissemination and exploitation of what they produced continues to be problematic. Furthermore, the impact of Leonardo in France still seems to be limited in terms of the effects on the quality of initial and continuing vocational training systems, innovations in the training market, or increasing the number of placements of trainees and young workers in the Member States of the European Union. Another observation made in the report is that partnerships are often restricted to the duration of project implementation although the objectives of the Leonardo programme would require them to continue in other forms. It stresses the fact that emphasis is put on the efficient functioning of the programme and the requirements to be adhered to during execution of the project. This, however, means that there is insufficient exploita-



tion of the actual results obtained and this often leads to the advantage of experimental processes to be underestimated. Because of this, the planning and innovation factor which is the basic purpose of this programme, cannot be fully exploited and developed.

### **Une nouvelle ambition pour la voie technologique.**

#### **[A new goal for the technological pathway]**

Decomps, Bernard

Paris: MENRT, 2001, 116 p.

*Ministère de l'Education nationale, de la Recherche et de la Technologie,*

*110, rue de Grenelle,*

*F-75357 Paris cedex 07,*

*URL: <http://www.education.gouv.fr>*

In order to guarantee the credibility, fluidity and lucidity of all training which is aimed at more professionalisation, an overall structure should be put in place in France for the occupational pathway. This structure calls for a stronger link between the technological stream and the vocational stream which should be built up by developing the vocational secondary school (lycée des métiers) and establishing smooth customised training paths between these two types of education. The task assigned to Mr. Decomps was a dual task. An indepth examination of the technological part of this occupational pathway together with an analysis of the origin of flows, access requirements for different series of the technological baccalaureate, the BTS and the DUT, and outlets for employment at these levels. This assignment was completed with the submission of a report on 1 February 2001. Proposals were developed for constructive changes in the technological baccalaureate, for links between the technological and vocational sections, and for access requirements enabling graduates with a generalist degree to enter this stream.

*URL: [http://www.enseignement-](http://www.enseignement-professionnel.gouv.fr/ministere/missions/rapport-decomps.htm)*

*professionnel.gouv.fr/ministere/missions/rapport-decomps.htm*

**GR** **Thesmoi kai politikes epangelmatikis katartisis: i evropaiiki proklisi kai I exelixi tou ethnikou systimatos**

### **epangelmatikis katartisis.**

Amitsis, Gavriil

Athens: Ekdoseis Papazisi AEBE,

2000, 949 p.

ISBN 960-021442-5

*Ekdoseis Papazisi AEBE,*

*Nikitara 2,*

*GR-106 78 Athens,*

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The present study investigates and records the institutional framework of certified vocational training in Greece and analyses the interventions of the EU for the modernisation and improvement of equivalent national activities. The study focuses on the following issues: a) analysis of the institutional context that governs the implementation of vocational training activities in Greece, b) recording of the representative planning services and rendering of vocational training services (initial and continuing), c) standardisation of the basic national European models in the field of vocational training, d) investigation of the role and the intervention of the EU for the promotion of the vocational training activities that are subsidised by ESF. According to the study, vocational training policies should be examined not only in the context of business and competitiveness but also in relation to the protection of people that are excluded from the labour market. The study concludes that a radical reorganisation of the vocational training policies and their adaptation to the new conditions is needed. This can be managed with the constitutional consolidation of the right of every individual to vocational training and the sub-system connection between initial and continuing training.

### **IRL 2000 review and 2001 outlook statement.**

FORFAS

Dublin: FORFAS, 2001, 39 p.

*Availability:*

*FORFAS,*

*Wilton Park House,*

*Wilton Place,*

*IRL-Dublin 2,*

*Tel. (353-1) 6073000,*

*Fax (353-1) 6073030,*

*E-mail: [forfas@forfas.ie](mailto:forfas@forfas.ie),*

*URL: <http://www.forfas.ie>*



The Statement contains an economic overview of 2000 in the context of the performance of the state development agencies. Among other information, it includes data on employment and skill needs. It discusses the work of the Expert Group on Future Skill Needs, which FORFAS supports. The Expert Group reports on e-business skill requirements and on in-company training and the FAS/ESRI (Training and Employment Authority/Economic and Social Research Institute) national vacancy survey are highlighted. In 2001 the Expert Group will focus on how to encourage a higher active participation of the 'over 55s' in the Irish labour-force. The IT skill requirements in the national economy; the skill needs of the construction sector in the light of the National Development Plan; the need for researchers in the private and academic sectors; and the issues associated with the overall supply and demand within the national labour market.

**Employment and human resources development operational programme, 2000-2006.**

Department of Enterprise, Trade and Employment

Dublin: Stationery Office, 2000, 127 p. + appendices

ISBN 0-7076-9008-0

*Availability:*

*Government Publications,*

*Postal Trade Section,*

*4-5 Harcourt Road,*

*IRL-Dublin 2.,*

*Tel. (353-1) 6613111,*

*Fax (353-1) 4752760*

An investment of Euro 14,199 million is proposed for this Operational Programme (OP) in human resources, of which Euro 901.09 million will be provided from EU Structural Funds over the coming 4 years. With the current economic boom in Ireland and the resulting tightening in the labour market, the emphasis in this OP is on pursuing policies that provide an adequate supply of appropriately skilled workers to sustain this growth. To this end, actions to increase the supply of labour whether women returners, older persons, people with disabilities or immigrants, are given priority. Proposals on in-company training concentrate on improving the quantity and quality of train-

ing and human resources development and providing support for social-partner driven approaches to training. The life-long learning of the individual is also to be supported with flexible delivery of education/training. Improving the quality of teaching at all levels of the education and training system and the ongoing development of a framework of certification and qualifications are discussed.

**Learning for life: white paper on adult education.**

Department of Education and Science - DES

Dublin: Stationery Office, 2000, 224 p.

ISBN 0-7076-6450-0

*Availability:*

*Government Publications,*

*Postal Trade Section,*

*4-5 Harcourt Road,*

*IRL-Dublin 2,*

*Tel. (353-1) 6613111,*

*Fax (353-1) 4752760*

Adult Education is the last area of mass education, which remains to be developed in Ireland. The White Paper sets out a blueprint for its future development and expansion, with a focus on access, quality, flexibility and responsiveness, and the establishment of national and local structures to help provide a coordinated and integrated system. The provision of a complementary, learner-centred education and training structure to ensure progression is a major priority. The White Paper discusses the consultation process since the Green Paper was published, and advances its proposals under the following headings - second-chance and further education, community education, workplace education, higher education, support services i.e. training of adult educators, accreditation, childcare etc., and the structures needed for implementation of these proposals.

**Partnership in training and lifelong learning: case study pack.**

Irish Congress of Trade Unions - ICTU  
Irish Business and Employers' Confederation - IBEC

Dublin: IBEC, 2001

various pagination

*IBEC,*

*Confederation House,*



84/86 Lower Baggot Street,  
 IRL-Dublin 2,  
 Tel. (353-1) 6601011,  
 Fax (353-1) 6601717,  
 URL: <http://www.ibec.ie>

The case studies are presented here as part of a review of the effects of partnership arrangements on lifelong learning at enterprise level. The study, conducted jointly by IBEC and ICTU in 2000, examines how partnership arrangements are influencing the nature and structure of training and development activities in Irish companies. The study also reflects some aspects of an enterprise-led approach to training, and the work of Skillnets - the Training Networks Programme, a body comprising both employer and employee organisations. Case studies describe how 10 Irish companies - semi-state, private, multi-national - have introduced partnership arrangements to facilitate the mutual involvement of management and employees in organisational development. In each case, these arrangements have also had an impact on the training and development processes within these organisations and indicate new approaches to lifelong learning in the workplace.

## **NL** Lifelong learning in the Netherlands: the state of the art in 2000

Cees Doets, Barry Have,  
 Anneke Westerhuis (red.).  
 's-Hertogenbosch: CINOP, 2001. - 136 p.  
 (Expertisecentrumreeks). -  
 ISBN 90-5003-333-4  
*Availability:*  
 CINOP,  
 P.O. Box 1585,  
 NL-5200 BP 's-Hertogenbosch,  
 Tel. (31-73) 6800768,  
[verkoop@cinop.nl](mailto:verkoop@cinop.nl)

In this report the central question addressed is how the idea of lifelong learning is manifested in a) the development of Dutch government policy towards vocational education and training, b) innovations in organisation of initial and post-initial education and training by educational institutions and in the workplace, and c) changing patterns of participation by adults in education and training. This question is answered from a number of

perspectives by the authors. In conclusion, it can be argued that the government, the social partners and educational providers in the Netherlands have taken a number of steps in the direction of a society in which the learning undertaken by adults acquires greater recognition and a more significant place.

## **Koers BVE: advies over de voortgang in de vernieuwing van het middelbaar beroepsonderwijs en volwassenen-educatie/SER**

's-Gravenhage: Sociaal-Economische Raad (SER), 2001. - 117 p. -  
 ISBN 90-6587-772-X  
 SER,  
 P.O. Box 90405,  
 NL-2509 LK Den Haag,  
 Tel. (31-70) 3499541,  
[verkoop@gw.ser.nl](mailto:verkoop@gw.ser.nl)

The Ministry of Education, Culture and Science [OC&W] has requested the board to advise on the content of the memorandum entitled Koers BVE (Course of Action in vocational training and adult education). In this memorandum, couched in a cohesive policy framework, the minister sets out the medium-range development course to be taken by the sector. The Koers BVE activities are geared towards reinforcing vocational education. The socio-economic Council [SER] was asked to advise on the content of the memorandum. This request for advice also included a call to pay particular attention to the following topics: reinforcing regional dynamics; shaping a multiple public responsibility; tuning supply to (regional) demand; ways of intensifying the position of participants by creating alternative funding arrangements to meet educational demands. The recommendation first of all gives an outline of the BVE sector in its social context and on the basis of that, it formulates a number of challenges. Themes that are important for the medium-range policy agenda are also specified. The convictions of the board with regard to these topics are further detailed, a differentiation is being made between a number of key topics. The following are discussed: control and responsibility, regional collaboration, accessibility of the BVE sector, and expediency and output.



## **P** **Classificação nacional de áreas de formação.**

### **[National Classification of Fields of Training].**

Diário da República (Lisbon) 78, 1ª série, 2001

*CIDES,*

*Praça de Londres 2-2º,*

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*E-mail: [depp.cides@deppmts.gov.pt](mailto:depp.cides@deppmts.gov.pt),*

*URL: <http://www.deppmts.gov.pt/cict.html>*

Vocational education and training are playing an increasingly important role in the quality of employment. The absence of comparable data on the training given in Portugal has hampered political decisions. The Statistical Office of the European Communities (Eurostat) and the European Centre for the Development of Vocational Training (Cedefop), aware of the difficulty of obtaining comparative statistics, have elaborated a sub-classification of fields of training to the International Standard Classification of Education (ISCED) by field of education. The Interministerial Commission for Employment (CIME) has translated this manual and adapted it to the situation in Portugal and thus established the National Classification of Fields of Training, as stipulated in Ministerial Decree No 316/2001.

## **Mudança organizacional e Gestão dos Recursos Humanos.**

### **[Organisational change and human resource management]**

Caetano António, coord.

Observatório do Emprego e Formação Profissional, OEFP

Estudos e Análises (Lisbon) 20

Lisbon: OEFP, 2000, 345 p.

ISBN: 972-732-603-X

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*Av. Defensores de Chaves, 95,*

*P-1000 Lisbon,*

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*Fax (351) 217817087*

The purpose of this study is to give information on organisational change and management of human resources with regard to: the quality of employment, the motivation and involvement of workers in the organisation, and their adaptability

to the different changes brought about by the competitiveness strategies of these organisations.

## **Os empresários e o mercado do 1º emprego: estratégias de recrutamento.**

### **[Entrepreneurs and the primary labour market: recruitment strategies]**

Moreno, Conceição, coord.; Colaço, Teresa [et al.]

CESO I & D

Lisbon: AIP, 2000, 201 p.

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This publication summarises the main findings of a study on 'Entrepreneurs, the primary labour market and recruitment strategies', commissioned by the Industrial Association of Porto and sponsored by the Institute for Employment and Vocational Training (IEFP). It was conducted by CESO Research & Development in the course of 1997 after a public call for tender. The study analyses the following problems: the high youth unemployment rate, the difficulty of getting a first job, the unemployment level of graduates and the low qualification of the workforce in general. In view of this situation, Industrial Association of Porto organised two seminars in the towns of Porto and Viana do Castelo and invited several specialists to analyse the findings of the study. This monograph contains some of these conclusions. The Industrial Association of Porto stresses the need to initiate action in the following fields: coherence and efficiency of initial training systems; transparency of training systems and recognition of qualifications; recruitment, job integration and promotion of employment; human resource management.

## **UK Schools: building on success**

Department for Education and Employment

Sheffield: DfEE, 2001, 96 p.

ISBN: 0-10150-502-7

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This green paper looks at changes in the education service since the Labour government came to power and sets out proposals for reform for the coming years. It highlights secondary education as the top priority for reform and proposes a system in which schools can progress from the current standard comprehensive format which characterises the majority of state schools, and become specialist schools focusing on particular curriculum areas, including vocational courses. It proposes to enable pupils from age 14 to mix academic and vocational courses and work-based options and it includes provision for high-standard vocational options across the ability range, with a clear ladder of progression at age 16 to higher vocational courses or to Modern Apprenticeships. The green paper also sets out the Government's vision for schools, colleges and local businesses to work together more closely to deliver work-related opportunities.

Online ed.: <http://www.dfes.gov.uk/buildingonsuccess/pdf/schools.pdf>

**Opportunity for all in a world of change: a white paper on enterprise, skills and innovation.**

Department for Trade and Industry, Department for Education and Employment  
Sheffield: DfEE, 2001, various pagination  
ISBN: 1-10150-522-1

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This white paper is concerned with the requirements for economic success in the next decade. It sets out the achievements of the present Labour government with regard to economic growth and education and training. It outlines proposals for adapting to change and ensuring investment occurs in a modern infrastructure. The key issues addressed are: equipping individuals with the right skills, building strong regions, investment for innovation, fostering a climate for enterprise and growth, and strengthening European and global connections. The paper makes clear that increasing the educational and skill levels of the population is essential to equip individuals with the skills, abilities and know-how necessary for economic growth. It makes a clear commitment to developing 'a vocational education system which matches the best in the world'. It gives details of a proposed investment of 163 million to develop vocational specialisms in colleges, to commit more resources in reformed Modern Apprenticeships, and to rationalise vocational qualifications. It proposes to train an extra 10 000 people a year in information and communication technology skills through new advanced learning programmes. It commits £45 million to developing a smaller, stronger network of National Training Organisations – the employer-led sectoral training bodies.

URL: <http://www.dti.gov.uk/opportunityforall>



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