

# VOCATIONAL TRAINING

## EUROPEAN JOURNAL



### The role of training in building the European Union

Community policies and programmes





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**for the Development**  
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CEDEFOP is a Community body created by a Decision of the Council of Ministers of the European Union (Regulation EEC 337/75 of the Council of 10 February 1975). It is managed by a quadripartite Management Board on which are represented the trade union and employer organizations, national governments and the European Commission.

Pursuant to Article 2 of the founding regulation, CEDEFOP "has the mission of assisting the Commission in order to promote at Community level the development of vocational training and continuing training".

Through its academic and technical activities, CEDEFOP is called upon to produce relevant knowledge of a precise and comprehensive nature on the Community perspective to assess the issues in the Work Programme which is approved by the Management Board in agreement with the Commission. The Work Programme currently focuses on two major issues:

- trends in qualifications
- trends in training systems

and to implement this programme CEDEFOP uses a variety of means:

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- dissemination of information (in a variety of forms using various media)
- the promotion of opportunities for the exchange and transfer of knowledge.

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# European vocational education and training policy judged by its impact on the labour market and the construction of Europe

The vocational education and training policy of the European Community is a good medium for reflection on the implementation of a sectoral policy backing the construction of Europe. The time which has elapsed since the Treaty of Rome<sup>1</sup> justifies an examination of the momentum of medium-term progress. This progress incorporates the play of economic, social and institutional forces whose point of encounter is the process of change, often partial, sometimes contradictory, but which, on the whole, represents a significant move towards the construction of a more coherent European area in which national traits continue to prevail.

Seen as a whole, the European Community has, in this field, encountered the classical problems of public policies made even more complicated in this case by the supra-national nature of its institutions. It first of all had to identify the priority areas of action in line with the tasks it assumed and which it considered to be relevant from the economic and social points of view. It is well known what difficulties arise when numerous actors participate in the decision-making process and are inspired by visions which may diverge vastly from one another. Furthermore - as the hierarchy of channels to be pursued for action was previously laid down - the essential task was to establish the most appropriate forms of action including the supporting institutions and the various social actors associated with them. These forms also included supra-national, national or infra-national levels of action.

The options in themselves were not pristine and often consisted of a compromise between political exigencies and the most adequate technical instruments. Finally, it was necessary to find the most appropriate resources - financial resources, human resources - which are seldom available in the right quantity and quality at the right place. Seen in rational terms, action in the public sector needs knowledge regardless of whether it is linked to analysis or evaluation. This implies that action has to be accompanied by research or by the creation of an information system.

Action in the public sector, whatever its field of application, makes use of instruments which are to some extent limited. Traditionally, it is mainly based on general laws and regulations which are applicable to all. It can also be based on directives which create constraining frameworks within which specific decrees and regulations aimed at achieving more precise objectives may be laid down. It may decide to confine itself to resolutions or recommendations which have no restrictive features but which are equivalent to a publicly proclaimed position intended to influence other public or private actors who have to take action. Finally, renouncing direct influence, it may be content to merely advocate the initiation of exploratory or demonstrative pilot projects whose good example could be persuasive and inspire emulation, at the same time introducing complementary measures for the dissemination of information.



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**The author traces trends in European education and vocational training policy from the Treaty of Rome to the present day. By examining Community action in the light of political, social and economic trends, he stresses "a significant move towards the construction of a more coherent European area in which national traits continue to prevail". He draws attention to a number of time lags and divergences in European policy with regard to national trends and also draws attention to increasing stress on economic considerations following the White Paper on "Growth, Competitiveness and Employment".**

1) The Treaty establishing the European Community signed in Rome on 25 March 1957, modified by article G, point 1 of the Treaty on European Union. It is published in "European Union: Selected instruments taken from the Treaties", Book I, Volume I, Luxembourg, Office for Official Publications of the European Communities, 1993.



***“(...) the European Commission has, in the field of vocational education and training, shown much prudence with regard to regulatory action and directives. It has preferred to devote most of its energy and resources to pilot projects and information.”***

***“Looking back, the policies pursued seem to be clearly guided by a dual aim - a socio-political goal supporting the construction of Europe based on a specific idea of democracy (...) and an economic goal based on a strongly displayed desire to promote the highest possible level of productive performance in a context of renewed and reinforced international competition.”***

***“Somewhat paradoxically, one may say that despite the enlarged objectives proclaimed by the Maastricht Treaty, the second objective has never been more predominant because of the importance attached to technological innovation in the White Paper on growth, competitiveness and employment in 1993.”***

It is evident that, in contrast to other fields of sectoral activities which mainly affect the economy - the functioning of the market - and the public freedoms, the European Commission has, in the field of vocational education and training, shown much prudence with regard to regulatory action and directives. It has preferred to devote most of its energy and resources to pilot projects and information. Its repeated desire to allow the principle of subsidiarity to be applied is explained mainly by the fact that vocational education and training is an area with a strong concentration of national socio-institutional structures rather than an area where economic instruments alone are applied on a rational basis. Looking back, the policies pursued seem to be clearly guided by a dual aim - a socio-political goal supporting the construction of Europe based on a specific idea of democracy - equal opportunities, prevention of social exclusion, establishment of élites - and an economic goal based on a strongly displayed desire to promote the highest possible level of productive performance in a context of renewed and reinforced international competition.

The relative weight of these two policy orientations has varied with time. Somewhat paradoxically, one may say that despite the enlarged objectives proclaimed by the Maastricht Treaty<sup>2</sup>, the second objective has never been more predominant because of the importance attached to technological innovation in the White Paper on growth, competitiveness and employment in 1993. The White Paper declares the necessity of profoundly adapting the educational and training systems so that they may respond to the challenges of technological change, industrial transformations and developments in the production systems, may promote qualification as a factor of competitiveness and growth, and may enable the competence of workers to become adapted so that there is greater access to the world of information. This leads to the re-affirmed right to life-long education and training.

In practice, if European vocational education and training policy is judged by its impact on the labour market and the construction of Europe, a distinction should be made between the activities involving the school, vocational training, transition

from school to working life, the university and the functioning of the labour market. This in turn implies that a distinction should be made between different phases of Community action, firstly the Treaty of Rome and the subsequent years up to the mid-80s, secondly, action programmes launched in the mid-80s, and finally, the projects linked to the implementation of the White Paper.

## **1. From the signing of the Treaty of Rome to the early 1980s**

This period, even though it may be fundamental for the development of European policy orientation in the field of education and training, tends to be disregarded because of its distance and its pioneering nature. Although at the time the Treaty of Rome was signed, some political leaders were aware of the importance of education for the consolidation of Europe and wished to create a European education policy, the texts of the treaties establishing the European Community were ambiguous enough to produce different interpretations by international jurists. A careful examination of the articles shows that they explicitly take account of the different aspects of vocational training: coordination in agriculture (Art. 41); mutual recognition of degrees, diplomas, certificates and other vocational qualification titles (Art. 57); initial vocational training and continuing training in the social field (Art. 118); and, above all, the introduction of a common vocational training policy which would contribute to the harmonious development of national economies and the labour market (Art. 128). The ECSC Treaty provides grants for the vocational re-training of workers. The Euratom Treaty contains the possibility of setting up schools for the training of nuclear specialists and a university-level institution.

Only in the period between 1969 and 1974 did the Heads of Government, backed by the European Parliament, proclaim the right for Europe to become a political community and, in view of this, decided to make efforts to achieve cooperation in the field of education (report by Henri Janne: “Set up a Community education

2) Treaty on European Union, signed at Maastricht on 7 February 1992, OJ No C191 of 29.7.1992



policy" presented in February 1973). In 1973 the portfolio for research, science and education was created and entrusted to Commissioner Ralf DAHRENDORF who in March 1974 presented the outline of an action programme with the title "Education in the European Community". This report explicitly states that priority should be given to the establishment of a strategy of cooperation in the field of education and to the promotion of a systematic exchange of information and experience. In June of the same year an Education Committee consisting of representatives of the Member States and the Commission was set up with the aim of preparing an action programme which would start operating in 1976.

These programmes, area by area, are a good indication of the preoccupations of that period.

### **Mobilization of schools for integration, promotion of equal opportunities and increased mobility between Member States**

Following Regulation No. 1612 of 15 October 1968 which stipulated that any child of a national of a Member State who was or had been employed in the territory of another Member State, was to be admitted to general school education, apprenticeship and vocational training under the same conditions as nationals of that State if the child resided on its territory, language programmes were developed in the schools together with financing arrangements for the stay of teachers in the country of the language taught. The measures envisaged for the children of immigrants coming from Community countries had the explicit aim of furthering their integration, as the Community was apprehensive of the risks inherent in the emergence of an uprooted sub-proletariat which had lost its original culture and had not acquired that of the host country. That is why, in 1977, the Commission published a directive on special introductory education in the host country language on the language and culture of the country of origin. At the same time, it mobilized the European Social Fund - in 1980 90 000 children benefited from measures to facilitate their entry into school - and established pilot projects to improve meth-

ods for reception and teaching of the language of origin.

Other activities were directed towards specific target groups such as disabled youth and girls. With regard to the latter, the school system was considered to be discriminatory because it did not provide the same channels of education it offered the boys.

### **Vocational training as a part of support measures for transition to working life and reduction of youth unemployment**

Whereas, in 1976 the number of unemployed in the European Community amounted to 4.5 million of which one-third were below the age of 25, in 1982, the unemployment figure had risen to 11 million of which 40% were in the above-mentioned age-group. The EC Commission therefore began to reinforce the activities undertaken by the Member States to tackle this new phenomenon in post-war Europe. The stated priority objective was - given the situation on the labour market - to prepare youth more effectively for their integration into society.

This was the moment in time when the Community set up CEDEFOP in Berlin - in February 1975 - and assigned it the task of strengthening, at Community level, the promotion and development of vocational training and the continuing training of adults. It was asked to examine the relations between the systems of education and the systems of vocational training and, to this end, to carry out up-to-date research, contribute to the coordination and development of research, promote exchange of information and experience, and provide support for initiatives aimed at finding a concrete solution for problems in vocational training. The Management Board of CEDEFOP was set up on a quadripartite basis - with representatives of the governments of the Member States, the Commission, national employers' associations and trade unions - in order to stress the importance attached to the role of the social partners in all matters relating to vocational training.

On 13 December 1976 the Council of the Ministers of Education adopted a resolu-

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***“On 13 December 1976 the Council of the Ministers of Education adopted a resolution dealing with the development, in the Member States, of pilot projects and studies to promote the training of young job-seekers (...)***

***“In 1981 the European Commission altered the structure of its services by linking education to social policy (...)***

***Parallel to this, still in 1981, the European Social Fund used more than 40% of its budgetary resources to help some 320 000 young people (...)***

***“Towards the end of the 1970s, European leaders saw that, despite a substantial rise in the number of university students in the Member States, international exchange and mobility still remained limited. Thus, more attention was devoted to measures which would stimulate this mobility (...)***

***“Although the early 1970s saw the emergence and development of continuing training in the Member States, the European Community was not overly interested in this aspect of the labour market and concentrated its efforts on measures for youth. However, it still pursued the objective of creating a European labour market by applying Articles 52 and 59 of the Treaty of Rome (...)***

tion dealing with the development, in the Member States, of pilot projects and studies to promote the training of young job-seekers, and with measures to establish continuous educational and vocational guidance processes and to improve vocational preparation during the compulsory schooling period.

In 1981 the European Commission altered the structure of its services by linking education to social policy in order to show that the priority in European educational policy was a general and vocational education which was closely geared to the problems of social policy and youth unemployment. Parallel to this, still in 1981, the European Social Fund used more than 40% of its budgetary resources to help some 320 000 young people, subsidizing training programmes and financing new forms of aid to facilitate the recruitment of young people in the firms or to create new jobs in the public services.

On 24 May 1982 the Council and the Ministers of Education decided to set up a new network of pilot schemes with the aim of strengthening national policy in each one of the Member States during the years 1983 to 1986, supporting a limited number of geographical zones and introducing active interaction processes between the schools and off-school areas. The accent was placed on local cooperation between the schools, post-school establishments, other social institutions, placement agencies, social partners, etc.

### **The universities and mobility within the Community**

Towards the end of the 1970s, European leaders saw that, despite a substantial rise in the number of university students in the Member States, international exchange and mobility still remained limited. Thus, more attention was devoted to measures which would stimulate this mobility: the production of “Student Guides” to inform students of the university systems in each country and how to gain access to corresponding study courses; an invitation, in 1976, to governments of the Member States to facilitate access to university for students coming from another Member State; the provision of funds for periods of stay of at least three months in the

university of another Member State within the framework of common study programmes between two universities; the same type of financing for professors and administrators to stay for some time in other Member States. Between 1976 and 1982 450 universities in all the Member States participated in 260 exchange projects, a figure which was still considered to be limited.

With the same purpose of creating a “European University Area” - a Europeanized élite - the Commission founded the European University Institute in Florence in 1976 following numerous initiatives launched by the European Parliament. This Institute which receives “post-graduate” students, has the aim of “contributing to the development of the cultural and scientific heritage of Europe within the context of its unity and its diversity”.

However, even though the academic recognition of degrees and diplomas, periods of learning and study courses was on the agenda since the birth of the Community, and despite the efforts of the Council of Europe and UNESCO to promote international conventions on equivalence, the question of the reciprocal recognition of degrees and diplomas was only given a cursory examination. This problem was re-examined in 1981 and 1982 by the Council of the Ministers of Education meeting in the Education Council, and led to the establishment of a working party to study the subject ... which meant an early grave.

### **The quest for a European labour market**

Although the early 1970s saw the emergence and development of continuing training in the Member States, the European Community was not overly interested in this aspect of the labour market and concentrated its efforts on measures for youth. However, it still pursued the objective of creating a European labour market by applying Articles 52 and 59 of the Treaty of Rome, which required it to promote access to non-salaried activities and their exercise, the general freedom of establishment and the total freedom of movement. Despite the small interest in the academic recognition of degrees and





diplomas, the European Community published in 1975 the first directive on the recognition of degrees for medical doctors. It thus revived the question of their freedom of establishment via recognition of their titles. This was followed by other directives applying to dentists, veterinarians, midwives and nurses, and then to architects, engineers, opticians, pharmacists and tax consultants.

### **The establishment of an information network**

In order to stimulate exchange of information, an information network called "Eurydice" was set up with a central service in the Commission and services in the Member States. While backing the 1976 action programme, the emphasis was placed on four themes:

- transition from school to working life,
- teaching and learning foreign languages,
- the training of migrant workers and their family members,
- provisions and conditions governing access to university studies.

## **2. The development of action programmes since 1985**

The same type of analysis may be applied to the period following the signing of the Single Act<sup>3</sup> when the Community, after 1985/1986, set up several targeted programmes which Patrick CLEMENCEAU has presented in this issue, and later created the LEONARDO programme which will come into being from the beginning of 1995 and is also presented in this issue by Antonio RUBERTI. Thus, the development of their activities will not be discussed at length. However, seen in a wider perspective these programmes show the broad continuity which has existed over time in the options selected for the implementation of European policy. Indeed, as P. CLEMENCEAU underlines, the Community is continuing to look for "good practices" which it can refine through experiment and then disseminate. That it why it attaches so much importance to

the financing of pilot projects and the information required for these projects.

However, some pronounced shifts in the priority themes of the programmes could be observed, shifts which are more often to be found in the orientations of national policies. Both are subject to powerful constraints arising from economic and social changes and benefit from the results of past experience. The Europe of the 1980s lost its competitiveness and had trouble in re-structuring its production machinery while, under the pressure of rising unemployment - the number of unemployed persons in the EEC rose from 12 million in 1982 to some 17 million in 1993 - the situation on the labour market deteriorated for all categories of workers, in particular for those with little or no vocational training. Within this context, the first specific activities focusing on equal opportunities - the trio, women, the disabled, immigrants - no longer had priority because of their inadequate ability to counter-balance the effects of structural change.

Within the continuity of the preceding programmes, the PETRA programme of 1988 accentuated the efforts to combat youth unemployment and social exclusion of youth by promoting the continuation of their initial training beyond the end of compulsory schooling, for instance, by reducing the dropout rate through remedial courses. In the same way, the ERASMUS programme for the exchange of students and professors was highly successful and showed a visible broadening of higher university education in Europe.

However, during this period two shifts occurred in the focus of European preoccupations. The first was a shift of the schools towards the enterprises with the aim not only of strengthening their links, wherever they existed, but also of giving the enterprises a more active place in the functioning of the labour market by making them play a greater role in continuing training (FORCE Programme 1991). This change of direction seemed to appear quite late in view of the national changes observed elsewhere. The second shift was the greater attention given to technological innovations, in particular those with an impact on information and

***"The Europe of the 1980s lost its competitiveness and had trouble in re-structuring its production machinery (...) the situation on the labour market deteriorated for all categories of workers (...)"***

***"(...) the first specific activities focusing on equal opportunities - the trio, women, the disabled, immigrants - no longer had priority because of their inadequate ability to counter-balance the effects of structural change."***

***"Within the continuity of the preceding programmes, the PETRA programme of 1988 accentuated the efforts to combat youth unemployment and social exclusion of youth (...)"***

3) European Single Act, signed in Luxembourg on 17 February 1986 and at The Hague on 28 February 1986, OJ No L 169 of 29.6.1987



***“However, during this period two shifts occurred in the focus of European preoccupations. The first was a shift of the schools towards the enterprises (...) FORCE Programme (1991). (...) The second shift was the greater attention given to technological innovations, (...) COMETT programme (1986), (...) EUROTECNET (1987).”***

***With the 4th Framework Programme on Research and Development (4th FPRD) attention was paid to “(...) the presence, for the first time in the research/development programmes, of a programme devoted to socio-economic aspects.”***

***“(...) a closer examination of the objectives presented in this programme causes some perplexity because of their similarity with the tasks set out for CEDEFOP at the time it was founded.”***

communication: transfer of technologies from universities to enterprises in the COMETT programme (1986), and the desire to tackle the effects of technological change on qualifications with EUROTECNET (1987).

These preoccupations, predominantly economic, lead us to the period following the White Paper on “growth, competitiveness and employment” which served as a framework both for the definition of the LEONARDO Programme and that of the 4th Framework Programme on Research and Development (4th FPRD). Special attention should be paid to the presence, for the first time in the research/development programmes, of a programme devoted to socio-economic aspects. In the introduction and presentation of the general research objectives in the “targeted socio-economic” programme, it is stated that the activities of the research programme are aimed at “producing new knowledge and clarifying decision-making in the future (...) which will make it possible to establish the basis for a sustained development of the European economies in order to face international competition and to create employment”. The three fields contained in the socio-economic programme include education and training in addition to integration and social exclusion in Europe. It is stated that research on education and training should illuminate Community initiatives in this field such as the LEONARDO Programme and the ADAPT programme of the European Social Fund, but it should also be in permanent contact with CEDEFOP and the Eurydice network.

At first sight, the inclusion of education and training in a European research programme seems to be a beneficial feature, given the great need for additional knowledge. But a closer examination of the objectives presented in this programme causes some perplexity because of their similarity with the tasks set out for CEDEFOP at the time it was founded. It is said, in other words, that the pro-

gramme should, in the short term, provide all persons in Europe engaged in research on education and training plus - on a larger scale - persons with responsibility in the educational systems of the European countries, with a foundation of information, knowledge and common references, plus additional information on the dimensions and the European components of problems in education and training. In the medium term it is asked, after studying the European aspects of the issues involved, to set up a community of research on education and training in Europe. In the long term, it is given the task of strengthening the function of education and training in moving towards Europe.

In order to achieve this general objective assigned to the programme for research on education and training, three large areas of study have been defined and their objectives have been set out in detail:

- education and training policies to “improve knowledge of the way in which the education and training systems in Europe can and should respond to the new and developing needs of society and the people of Europe” (and also to) “advance knowledge on the specifically European aspects of these problems and their different components”;
- “the factors and mechanisms enabling a rise in the general quality of education and training in Europe, and an improvement of the innovative capacity of the educational system” with particular attention to teachers and new technologies;
- “the competences, qualifications and knowledge required to meet the needs of the European socio-economic systems”.

It does seem to be legitimate to question the purpose of so much redundancy. Whatever the answer may be, the wish to clarify the policy orientations to be followed in the future will certainly be of great value for all concerned.



# The vocational training policy of the European Union

## Vocational training in the White Paper

The Commission's White Paper on Growth, Competitiveness and Employment addresses a fundamental question for the Union. Bearing in mind the considerable resources available to the Community, how can future development be shaped so that a new balance is established between growth, competitiveness and employment and an end put to underemployment and labour market exclusion, which are all too apparent at present?

The aim of the White Paper is to find ways and means of introducing a new dynamism into the systems of employment within the Community, the term "systems of employment" being taken as covering education and training social protection, work organization, internal markets in enterprises, and the labour market. The White Paper draws express attention to the fact that human resources and this education and training constitute a major path to that end. Enhancing human resources within the European Union is a key means of successfully addressing the challenges posed by technological advance and concomitant social change.

Human resources and access to knowledge must form the core of the new socio-economic model if there are to be changes in industry and advances in production systems. From now on, undertakings know that - with technology forging ahead - they will only be able to maintain the edge they have over the old and new countries active on the world market if their workers acquire new abilities and skills during their working lives. Obtaining qualifications must come to be recognized and encouraged as a key factor for growth and competitiveness.

The report drawn up in the wake of the White Paper on "Europe and the Global Information Society" documents once more the need for changes in education and training in the light of the challenges detailed in the White Paper. The ever increasing penetration of new information and communication technologies in goods manufacture and the commercial and non-commercial service sectors opens up new fields of access to knowledge. At the same time, however, this means that education and training levels must be raised for all. What we are experiencing is a revolution based on access to information and its dissemination and an extension of the opportunities for transmission and processing. Education and training will play a key role in preparing European citizens for this revolution. The aim of the White Paper, which is to give all European citizens a right to lifelong education and training, is fully justified in this context.

It should also be borne in mind that in some ways the economic system is more dependent now than it has been in the past on a capacity for creativity and innovation and on the role played by education and training establishments, particularly the universities given the scientific knowledge they have at their disposal. One of the major challenges we face at present lies in coming to grips with the "information society". Research and development, innovation, and telecommunication networks aim to extend the role played by the processing and transmission of information, making it an ever more important factor in the production process and in society at large. Education and training are, therefore, crucial if people are to become integrated into and exercise control over the information society. They are a means of handing on and adding to the value of the intangible



## Antonio Ruberti

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**"The Union's activities can have no more than an indirect effect on the adaptation of the education and training systems in the Member States. Being by their very nature operational and programmatic in character, they must help the players and the decision makers at the different levels in the Member States to identify common objectives, bearing in mind that the Member States retain sovereignty over their policies. The policy of the Community will flow from implementation of the LEONARDO programme. (...) It will fully respect the principle of subsidiarity established by the Treaty of European Union."**

**"The aim of the White Paper is to find ways and means of introducing a new dynamism into the systems of employment within the Community, the term "systems of employment" being taken as covering education and training, social protection, work organization, internal markets in enterprises, and the labour market."**

**"Human resources and access to knowledge must form the core of the new socio-economic model if there are to be changes in industry and advances in production systems."**



***“(...) changes in education and training systems are prompted by a whole host - and sometimes, it would appear a confused host - of local and sectoral changes rather than by overall structural reforms(...).”***

***“(...) two major issues dealt with by the White Paper: raising the level of initial training for young people and providing far more continuing training.”***

capital which passes from one generation to the next and also of increasing this capital within the lifetime of one generation, bearing in mind the speed of socio-economic change.

## **Adapting the systems**

The far-reaching adaptation of education and training systems recommended in the White Paper has already begun. The players concerned, primarily the public authorities in the Member States, are well aware of the extent of the changes that need to be introduced. However, changes in education and training systems are prompted by a whole host - and sometimes, it would appear a confused host - of local and sectoral changes rather than by overall structural reforms. Nevertheless, Member States clearly recognise the need to raise the quality of training systems and to respond to the two major issues dealt with by the White Paper: raising the level of initial training for young people and providing far more continuing training.

The increase in unemployment amongst young people and the unemployment levels reported by some Member States make both these issues a priority for them. The general objective dovetails with a reinforcement of the measures designed to prevent young people from leaving the education and initial training systems too soon in order to limit as far as possible the number of young people entering the labour market without adequate basic training. More measures are also needed to facilitate and accompany the process of transition from school to working life for those groups encountering the greatest difficulties. These should primarily take the form of “guarantees” of a resumption of the training process and they should extend more generally to the great majority of education and training graduates, including young people who have obtained qualifications. Raising the status of vocational training within initial training, enhancing the attractiveness of vocational training, and improving vocational guidance are ongoing concerns which are the target of a wide range of activities in several Member States.

The upgrading of continuing training in all the Member States is the subject of a permanent dialogue between the public authorities and the players, as well as between the social players themselves at the regional, branch and/or enterprise group level. However, even though everybody shares the aim of extending access to continuing training, the fact of the matter is that access remains inadequate and very unequal, depending on the category of worker or enterprise. Hence, despite the realisation that changes in socio-economic conditions are speeding up, there is no corresponding acceleration in access to training. As a result, skills are not being adapted as rapidly as the situation requires. Greater investment in training in enterprises is recognized as a priority objective, particularly in SMEs for which a number of new approaches have been found (groups, replacements, mutualization of funds etc.). However, it is still below the required level, especially in the light of changes in industry. One positive aspect is the establishment of partnerships between the public and private sectors, the search for synergies, and the pooling of efforts by both sectors, including their respective resources.

## **The policy of the Union**

The Union's activities can have no more than an indirect effect on the adaptation of the education and training systems in the Member States. Being by their very nature operational and programmatic in character, they must help the players and the decision makers at the different levels in the Member States to identify common objectives, bearing in mind that the Member States retain sovereignty over their policies. In a Europe without frontiers but with guarantees for the specific cultural and historical features to be found in individual countries, the supplementary support provided by the Union is aimed at reinforcing synergy, convergence and cooperation, notably by contributing to the establishment of a common heritage of experience and good practice.



## A policy based on subsidiarity

The Treaty of the European Union is based on recognition of the fact that responsibility for financing and implementing vocational training rests first and foremost with the public authorities in the Member States and with the social partners. The role of the Union must be to generate impetus and innovation, to support voluntary convergence, and to enhance the status of quality and innovation capacity within the systems. Given a framework of common objectives, the Union can promote transnational activities geared to bringing about a convergence of training policies within the Community.

The policy of the Community will flow from implementation of the LEONARDO programme, which must be decided on before the end of 1994 since it is due to come into force on 1 January 1995<sup>1</sup>. It will fully respect the principle of subsidiarity established by the Treaty of European Union. This excludes any harmonization of national systems, recognizes the full responsibility of the Member States for the organization of training systems and their contents, and gives the Union responsibility for implementing a vocational training policy which supports and supplements the initiatives of the Member States.

Given the common position in respect of LEONARDO, which was adopted by the Council on 18 June 1994, the principle elements of the Union's policy can now be pinpointed.

1. The need to improve the quality and innovation capacity of vocational training is recognized as being indispensable for a strategy of growth, competitiveness and employment, in particular to increase the capacity of the European economies to create jobs and to keep pace with the development of employment systems.

2. The activities of the Union in the field of vocational training, which are geared to supporting and supplementing the activities of the Member States, have their origin in a general framework of objectives which, from the Commission's point of view, represent the political priorities

that need to be pursued within the Union to enhance the quality and innovation capacity of vocational training.

3. The activities of the Union are designed to encourage partnership between all the players with a view to improving vocational training, especially by means of close cooperation between the social partners at the respective levels, also as players.

4. The impact of the Union's programme of activities must be reinforced by a monitoring and evaluation procedure which will be carried out in partnership by the Commission and the Member States and will provide regular information to the bodies concerned, in particular the Vocational Training Advisory Committee.

## Support for transnational activities

The vocational training action programme - Leonardo - has benefited from the experience of previous programmes - Comett, Force, Petra, Eurotecnet, Lingua - in providing a coherent and consistent support framework for the different players. The emphasis is on developing transnational project partnerships directly involving the players concerned, the development of networks, and transnational exchanges between students, young people in training, and training specialists.

Given the experience furnished by Petra, the Leonardo programme stresses the need to develop initial training partnerships bringing together the different training bodies in the Member States and including exchanges between young workers. A specific aim of this cooperation between the training bodies is to produce tried-and-tested training profiles. By the same token, Leonardo supports joint projects geared to the social and occupational integration of young people, in particular by supporting cooperation between initial training establishments and enterprises at the regional and local level. Special emphasis is placed on transnational exchanges between trainers and experts in initial vocational training, including those responsible for vocational guidance.

***"(...) the principle elements of the Union's policy can now be pinpointed:***

***- "the need to improve the quality and innovation capacity of vocational training (...)"***

***- "a general framework of objectives which, from the Commission's point of view, represent the political priorities that need to be pursued within the Union (...)"***

***- the development of " (...) partnership between all the players with a view to improving vocational training, especially by means of close cooperation between the social partners (...)"***

***- "(...) a monitoring and evaluation procedure of the LEONARDO Programme which will be carried out in partnership by the Commission and the Member States"***

***"Leonardo - has benefited from the experience of previous programmes - Comett, Force, Petra, Eurotecnet, Lingua - (...). The emphasis is on developing transnational project partnerships(...)"***

<sup>1</sup> Editorial note: cf. Council Decision of 6 December 1994 setting up an action programme to implement a European Community vocational training policy. OJ No 340 of 29.12.1994, Office for Official Publications of the European Communities.



***“Among the areas in which various measures are to be applied - in addition to the traditional areas of cooperation stemming from COMETT, PETRA and FORCE - it is worth underlining the special emphasis given to vocational guidance, language training, and the promotion of equal opportunities existing in and provided by training, as well as exchanges between trainers and the greater support given to facilitating the dialogue between the social partners.”***

***“Efforts must also be redoubled to disseminate the results of projects they have undertaken, the innovations they have produced, and the transnational pilot schemes they have launched, notably in the field of technological innovation.”***

***“(…) greater stress will be placed on coordinating the activities of the Leonardo programme with the Socrates programme and the initiatives of the European Social Fund.”***

By emphasising the need to improve the quality of continuing training systems and to support the capacity for innovation in training (including multimedia and distance learning) the Leonardo programme can make a major contribution to the perceptions and activities of the Member States and the social partners in this field. By supporting continuing training projects in a specific area or sector and by encouraging an exchange of good practices (including exchanges of trainers), Leonardo is in a position to meet the needs of the players involved in continuing training in the Member States. Indeed, in passing on the experience gained in programmes such as Force and Comett, Leonardo provides an opportunity for a beneficial comparison between the approaches pursued in such complex areas as the setting up of internal training schemes in enterprises, in groups of enterprises or sectors, and between an individual approach and a collective approach to continuing training.

A balance has been found between the pursuit and the continuity of the activities contained in the Comett, Force, Eurotecnet, Lingua and Petra programmes, which have proved their value, and introducing new activities. The new measures will enable the Union to become active in respect of the lifelong training objective underlined in the White Paper, to extend the ways and means in which the results of projects and innovative measures can be disseminated, to promote exchanges between trainers and, importantly, to lend greater support to the dialogue between the social partners.

The division of the measures envisaged into two main areas, the first geared primarily to the systems and arrangements of training and the second directed at training and the training market - a division which comes comparatively close to the proposal originally made by the Commission - is important in terms of the clarity and transparency it establishes. This is underlined by the twin-track procedure for the selection of projects, depending on whether they are directed towards the systems or towards the market, a procedure which will make it possible to largely involve all the players concerned. It is important to emphasise that, in respect of the principle of subsidiarity, the com-

mon position envisages a greater involvement of the Member States in the selection of projects, which should lead to better coordination between transnational activities and the policies of the Member States.

## **Priority areas**

Among the areas in which various measures are to be applied - in addition to the traditional areas of cooperation stemming from COMETT, PETRA and FORCE - it is worth underlining the special emphasis given to vocational guidance, language training, and the promotion of equal opportunities existing in and provided by training, as well as exchanges between trainers and the greater support given to facilitating the dialogue between the social partners. Leonardo will enable both sides of industry, which play a key role in continuing training, to establish a support framework allowing them to launch specific operations in which they are involved as well as to obtain more precise knowledge of innovative activities bringing together the social players at the local level. The activities of the Union will also make it possible to lend practical support to the dialogue between the partners at the respective levels devoted to the issue of improving continuing training.

Efforts must also be redoubled to disseminate the results of projects they have undertaken, the innovations they have produced, and the transnational pilot schemes they have launched, notably in the field of technological innovation. Specific activities will be devoted to circulating innovations and passing on the methods, tools and results of vocational training in the training systems and programmes, including through telematic networks and apprenticeship systems and by open and distance learning. In addition, greater stress will be placed on coordinating the activities of the Leonardo programme with the Socrates programme and the initiatives of the European Social Fund.

Considerable means will also be devoted to a programme of studies, analyses and data exchanges covering the whole field



of vocational training. The promising results achieved with FORCE - a barometer for the advance of continuing training - indicate the level of interest in programmes of this kind, which make it possible to gradually establish comparable and recognized elements of reference, enabling the players and in particular the political decision makers to put their own indicators and data in context. This research and analysis programme, which forms part of LEONARDO, will be clearly formulated and able to draw on the research projects that enjoy support as part of the socio-economic area featuring in the 4th Research and Development Framework Programme.

## Conclusions

LEONARDO will provide the Community with a political and operational tool which will make a decisive contribution to attaining the targets mapped out in the White Paper. These targets are ambitious and - in some aspects at least - they may even seem audacious. However, there can be no doubt that the training of men and women, the transformation of work organization, the increase in the means of access to knowledge, the spread of innovations and the results of research and development will make it possible to achieve these targets. The Union's vocational training policy is geared to this end.

# Community Vocational Training Programmes 30 years' cooperation, action, concertation

Europe of training ... The European training market ... Transnational training partnerships ...

These terms have now become part and parcel of the language and the universe of European trainers. They provide points of reference for their activities and their practices. In some cases they constitute goals which have still to be achieved, but the European process in the field of vocational training is both concrete and tangible. As wisely envisaged by the authors of the Treaty of Rome, this Europe of training has gradually emerged, step by step. These 30 years of the European development of vocational training can be rapidly retraced without attempting to give an exhaustive description but in outlining some stages and by identifying the main points of reference.

## I. The foundations: general principles

Community action in this field began very early since the founding act could be con-

sidered to be the Decision of the Council of 2 April 1963 (1) which established the general principles for a common vocational training policy by applying Article 128 of the Treaty of Rome. Three characteristics from this text should be stressed:

First of all, the founders retained the idea of a common vocational training policy. This means that the establishment of coherence and even convergency of national policies and their forging into a "common policy" at the level of the Community was a goal envisaged at the time. Diversity and autonomy of systems which were at the heart of the recent debate on subsidiarity do not seem to be such determining factors at that time as they are today.

However, this has to be relativised by the fact that the common policy does not go beyond the adoption of the general principles which must, to a certain extent, serve as a reference frame for national policies. The goal is not, by way of them, to unify national systems but rather to give them a few major objectives, common

***"Considerable means will also be devoted to a programme of studies, analyses and data exchanges covering the whole field of vocational training."***

## **Patrick Clemenceau**

*Senior administrator in  
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***"Following a short analysis of action programmes commencing in the 80s in which links are drawn to certain stages and reference points in the process of European construction, the author cites the aims of vocational training policy in relation to the Treaty on European Union and the main orientations of the LEONARDO programme which forms the major cornerstone."***





***The Decision of 1963 also stated that "(...) Community action must be concerted action within the Member States and, also - this is a major characteristic - with the social partners. It was with this goal in mind that a Council decision was taken to set up the Advisory Committee on Vocational Training which was to provide, for the next 30 years, a forum for concertation, debate, consultation on the future action and orientations proposed by the Commission."***

***"The Community policy on vocational training really took off in 1985-86 (...) The programmes which emerged from 1985 onwards aimed to find solutions to specific problems (...) It was not merely a question of laying down some major common orientations (...) but rather of developing concrete action programmes on strategic problems: youth unemployment, development of competitiveness of enterprises for example."***

***"The generation of programmes in the 1980s is characterised by the desire for direct action."***

objectives, which should enable them to give all citizens in the Community common elements in the field of vocational training. However, this question of the definition of common goals has been strongly debated yet again, 30 years later, in conjunction with the LEONARDO programme (2) and the White Paper on competitiveness, growth and employment (3).

Finally, we should stress the surprising topicality of this text. The major goals of vocational training and most of the principles contained therein are still valid today. We can see, for example, with what clairvoyance the authors at that time forecast the development of life-long training.

The decision of 1963, as a supplement to these general principles, also established a rule which has been maintained; Community action must be concerted action within the Member States and, also - this is a major characteristic - with the social partners. It was with this goal in mind that a Council decision was taken to set up the Advisory Committee on Vocational Training which was to provide, for the next 30 years, a forum for concertation, debate, consultation on the future action and orientations proposed by the Commission. This body, which is sometimes thought to be unwieldy, is one of the foundations for Community action in these fields, something which distinguishes it from the others.

## **II Development: implementation of the action programmes**

The Community policy on vocational training really took off in 1985-86 with a series of decisions by the Council introducing action programmes which put the seal on the very promising lessons and results obtained from the first experimental programmes, such as Transition I (4a) and Transition II (4b), at the end of the 1970s and the beginning of the 1980s.

This extension of Community training programmes was undertaken within the context of the Single Act and with an eye to the achievement of the Single European Market. Concerns linked with human fulfilment and cultural development

which prevailed, to a large extent, in the general principles of 1963 were replaced by objectives with a stronger economic character.

The programmes which emerged from 1985 onwards aimed to find solutions to specific problems, most of which are still to be found in current policies. It was not merely a question of laying down some major common orientations, as did the decision of 1963, but rather of developing concrete action programmes on strategic problems: youth unemployment, development of competitiveness of enterprises for example.

The generation of programmes in the 1980s is characterised by the desire for direct action. The central idea in these programmes was that, in order to give a common response to the problems encountered in the Member States, experiences had to be brought together, there had to be greater comparison of the approaches developed so far in a isolated manner as well as the identification and, if possible, transfer of "good practices". This entry of the Community into concrete action constituted a very important step. Here the Community assumed a determining role in developing innovative action with a transnational dimension which would prove its worth and thus provided fertile ground for experimentation and the transfer of innovation.

### **2.1 Reminder of action programmes**

COMETT (5a, 5b)

This programme, which was launched in 1986, is the first large-scale programme designed to promote the transfer of technical innovations. One of its goals is to develop, on the basis of structured cooperation between companies and universities, the transfer, via training, of results from research and development to enterprises. Another goal is to develop the contribution of higher education to continuing training. COMETT was designed to be a counterpart in education and training to the research and development programme ESPRIT (6a, 6b). This idea of cooperation between universities, representing the scientific and research world, and the business world and companies is more than ever on the agenda given the emphasis on the consequences of the globalisation of markets and technologies.



## EUROTECNET (7)

Innovation in the field of vocational training triggered by technological change gave rise to the EUROTECNET programme which began in 1987 and was consolidated in 1990. It aims to take account of the effects of technological change on qualification systems and training methods. To a certain extent, EUROTECNET prepared the goals of quality in training and innovation in training which are at the heart of the LEONARDO programme.

## PETRA (8a, 8b)

The 1980s also saw the emergence, on a large-scale, of youth unemployment and the search for solutions to facilitate the transition between school and working life. In the field of initial training for young people PETRA, from 1988 onwards, had the goal of providing broadly based and recognised training to all young people by enabling them to profit from one and, if possible, two years of vocational training following compulsory schooling. It is designed to give Community support to policies aiming to combat youth unemployment by fixing new standards of initial vocational training in the Community and by systemising cooperation between initial training systems, which gradually introduce these practices of cooperation and transfer.

## FORCE (9)

The development of continuing training and training plans and programmes in companies is the goal of FORCE which was launched in 1991. It aims to encourage greater and more efficient investment in the continuing vocational training of company staff. To that end it has encouraged the development of partnerships to increase awareness amongst public authorities, enterprises - in particular SMEs -, the social partners and individual workers concerning the benefits to be drawn from investment in continuing vocational training.

## 2.2 The transnational dimensions of action programmes

The action programmes launched between 1985 and 1990 made possible the introduction of and experimentation with

the tools of transnational cooperation: setting up of cooperation partnerships, exchange programmes for trainees, students, trainers, experts, the elaboration of principles to describe and present systems and networks for more permanent cooperation between Member States and the Community.

### Exchanges

The action programmes in the field of vocational training are not mobility programmes as such. The exchanges are targeted towards strategic groups and constitute support or a part of the training process itself. It must be stressed that, given the path opened by ERASMUS (10a, 10b) for higher education, these exchanges of young people or trainers have contributed on a large-scale to increasing awareness and familiarity with the Community's action programmes. They constitute the most well-known and widespread "image".

□ 20 000 young people profited from a training place or work experience in another Member State in 1992 and 1993 within the framework of PETRA. These placements introduced a true Community dimension into the training supplied to young people in national systems.

□ The FORCE programme encouraged the mobility of trainers and, more generally, those responsible for human resources and training in companies as well as the social partners responsible for continuing vocational training: 400 human resources directors, 430 trainers, 130 staff representatives and 40 members of trade union organisations took part, in 1991 and 1992, in exchange programmes which had the goal of bringing about the rapid transfer of innovation, the creation of stable partnerships and the implementation of continuing training activities.

□ The 28 000 placements of students supported by COMETT only make up a small proportion of demand (which is approximately five times higher). These practical courses are very much in demand, to the extent that they give young people an effective introduction to working life and considerably increase their chances of finding a job. It has also been shown that these courses help to streng-

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***FORCE targets "(...) the development of continuing training and training plans and programmes in companies"***

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***“(...) the preparation, fine tuning, assembly and development of transnational pilot projects leading to common training modules, or even common training programmes, have produced significant results.”***

***“(...) the provision of comparable data is an essential prerequisite in order to understand how these systems operate and to improve the exchanges of information and experience between the Member States.”***

***“FORCE has drawn up synoptic tables of the data available on in-company continuing training. A statistical survey, conducted in liaison with EUROSTAT, is nearing completion.”***

***“Three sectoral surveys (retail trade, food industry, motor vehicle repair) made it possible to assess the major training practices on the European level.”***

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then cooperation between universities and enterprises. The 1 000 exchanges of staff between universities and European companies have also helped to improve the transfer of technology between the academic and business worlds, above all via “tacit knowledge”, that is the knowledge acquired through experience.

### **Pilot projects**

The first moves towards creating a European training market, the preparation, fine tuning, assembly and development of transnational pilot projects leading to common training modules, or even common training programmes, have produced significant results. This area of activity is, without doubt, less well-known than the exchanges but it does bring about extensive and lasting changes by involving trainers and providers from different Member States in the establishment and implementation of new training products on a transnational basis.

□ Within the framework of PETRA more than 700 projects, 14 000 instructors or trainers and 85 000 young people have participated in network activities since 1988 in order to develop and test new and innovative training products.

□ The 430 FORCE projects focus on training and qualification needs of the companies which make up the major share of the 3 500 partners of these projects. They provide three major activities for adjustment to industrial change via training: training as a means of preventing unemployment by consolidating and diversifying the competences of staff; training as a means of developing new forms of work organisation and the new competences necessary for the survival or the development of the enterprise; training as a means of development, above all by adjustment to new technologies.

□ EUROTECNET has encouraged the development of new and flexible responses to training problems which are then disseminated in the project network: conceptual developments concerning current and future trends, within the framework of the development of technologies (ability for self-training, skill generating organisation, qualifications/key competences), case studies to illustrate concep-

tual models, analytical studies of needs for training according to an intersectoral approach and the development of the tools and instruments for dissemination.

□ The 7 000 training courses organised with the support of COMETT II in the most diverse technological fields have been designed to reach more than 200 000 people, 140 000 of whom come from industry. The 3 000 training materials which have been developed, or are in the course of being developed, will reach more than 500 000 people in Europe. Compared with COMETT I, the classes organised during COMETT II have attracted a growing audience, in particular female. Several projects were able to demonstrate the impact of the use of new training materials, in particular multimedia compared with traditional training forms.

### **Studies and surveys**

The diversity of training systems in the Member States, their organisation, the role of the players, the sources of financing are the fundamental condition behind Community action and the principle of cooperation which it aims to develop. In order to cope with the diversity of initial and continuing training systems and to understand how they operate, the provision of comparable data is an essential prerequisite in order to understand how these systems operate and to improve the exchanges of information and experience between the Member States.

□ FORCE has drawn up synoptic tables of the data available on in-company continuing training. A statistical survey, conducted in liaison with EUROSTAT, is nearing completion. It will provide, for the first time, comparable data on the Community level concerning the actions and costs of training in European enterprises as well as an objective approach to the efforts and the quality of training offered by enterprises for their staff.

□ Three sectoral surveys (retail trade, food industry, motor vehicle repair) made it possible to assess the major training practices on the European level. A fourth (road transport) has just been launched. All these surveys mark the beginning of European sectoral networks (research institutes, enterprises, social partners) in-



volving the players from the 12 Member States.

□ The analysis of contractual policy enabled a stocktaking to be made of joint actions, agreements and collective activities undertaken by the social partners in the field of continuing training. It paves the way for the improved involvement of the social partners as players in the vocational training of company staff within the European Community.

### The networks

Various types of transnational exchange networks and cooperation have been set up. They give permanent status to cooperation and enable the best possible use to be made of results.

□ The network of national coordination units of PETRA, which is responsible for the implementation and the operation of the programme within the Member States, has become a key tool for support for transnational cooperation and innovation in the field of initial training and, more generally, for the social and occupational integration of young people. Downstream the network of trans-European training partnerships for young people or the network of national centres for vocational guidance constitute a first link in the chain for the Community which is extremely useful in promoting later cooperation.

□ The COMETT programme led to the setting up of 205 university-enterprise training links. To a certain extent, these links are interfaces between higher education and enterprises. Some links are more regional in nature others specialising more in a specific technological sector. Working in close liaison with each other, these links offer major tools for identifying both the best competences available in Europe in the one or the other field and the needs for training in the transfer of technological innovation. Via these links, COMETT has encouraged the launching of a European dialogue between universities and enterprises in the field of education and training - a dialogue which was practically non-existent so far. A dialogue of this kind enables the setting up of training courses which correspond better to real needs.

## III LEONARDO, a new legal basis, rationalisation of actions

### 3.1 The Treaty of the European Union, a new reference framework

In one area of competence shared between the Community and the Member States, the provisions of Article 127 of the Treaty document major changes compared with the legal situation defined in Article 128 of the Treaty of Rome. The text lays down, in particular, that the Community is responsible for implementing a vocational training policy to support and supplement the policies of Member States whereas, previously, the action of the Community involved establishing general principles for a common vocational training policy.

This vocational training policy must pursue five major goals which correspond to the fundamental challenges for the Community and which give it special responsibility in order to achieve them:

- to facilitate adaptation to industrial change, above all via training and retraining;
- to improve initial and continuing vocational training in order to promote integration and reintegration on to the labour market;
- to facilitate access to vocational training and promote the mobility of trainers and trainees, in particular young people;
- to encourage cooperation in the field of training between educational or training bodies and enterprises;
- to develop the exchange of information and experience on questions common to the training systems of the Member States.

The text explicitly states that the intervention of the Community in no way foresees the harmonisation of the legislative and regulatory provisions of Member States. It confirms their responsibility in respect of the content of programmes and organisation of training. This is a fundamental provision. Harmonisation has not been thrown out because it is too difficult to achieve but because it would be

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*“(…) the provisions of Article 127 of the Treaty document major changes compared with the legal situation defined in Article 128 of the Treaty of Rome.”*

*The aims of vocational training policy as cited in the Treaty on European Union:*

- *“to facilitate adaptation to industrial change, above all via training and retraining;*
- *to improve initial and continuing vocational training in order to promote integration and reintegration on to the labour market;*
- *to facilitate access to vocational training and promote the mobility of trainers and trainees, in particular young people;*
- *to encourage cooperation in the field of training between educational or training bodies and enterprises;*
- *to develop the exchange of information and experience on questions common to the training systems of the Member States.”*



***“The catalytic role of the Community is expressed in the common framework of goals established by LEONARDO (...). The Community measures defined in LEONARDO are the operational counterpart to the goals described by the common framework.”***

***“Continuity is guaranteed by the fact that the types of measures in older programmes have been extended on and systematised (...). However, we must also note the new accent on the dissemination and multiplication of results.”***

counterproductive and would not meet the goals of the Union. The diversity of systems and the responsibility of Member States for the organisation and content of training are thus recognised as fundamental elements in Community policy. The main role in the financing and implementation of vocational training activities falls to the public authorities in the Member States and to the social partners. The role of the Community must, therefore, be to provide stimulus and innovation.

### **3.2 The major lines in the LEONARDO programme**

The catalytic role of the Community is expressed in the common framework of goals established by LEONARDO. It constitutes the fundamental goals for vocational training which are structured around the promotion of quality and the capacity for innovation in vocational training. This catalytic role is an important dimension which, in the future, will require the elaboration of different instruments.

The Community measures defined in LEONARDO are the operational counterpart to the goals described by the common framework. They aim to support and supplement the action of Member States by giving a transnational dimension to vocational training activities. LEONARDO aims to simplify and rationalise, on a large-scale, Community measures and actions.

Continuity is guaranteed by the fact that the types of measures in older programmes have been extended on and systematised: pilot projects for cooperation, programmes for the exchange of different groups in training, studies and analyses. However, we must also note the new accent on the dissemination and multiplication of results. The general feeling is that the products which come from transnational partnerships are extremely interesting but have not, as yet, been sufficiently exploited throughout the Community. Increased efforts along these lines could give greater reality to the concept of the European training market or rather to the European training area, since we are not only talking about private providers.

The second point to be stressed is the distinction between the programmes depending on whether they are oriented towards the systems or the market. This distinction does not aim to set up rigid divides between what private providers are doing and what public providers are doing, but rather to clarify the degree of impact and the effect of Community action on the national systems. Some mainly concern the providers who are involved (implementation of a training module for specific technologies used by a restricted group of companies for example), others are suitable for wider utilisation (preparation of training modules on key competences in initial and continuing training). This distinction between the programmes - and the procedures which correspond to each of them - should bring about improved articulation between the actions of the Community and national policies.

2 It is clear that, for well-known reasons, cooperation on the level of the Member States between the providers and players in various areas is difficult and sometimes very restricted. It is equally clear that this transversal cooperation is a fundamental advantage for general relations between the world of education and the world of industry. The Community can play a decisive role in triggering developments. The idea of partnership, which is at the heart of Community action, must be developed on a large-scale. The responsible parties in countries, cultures and different systems learn to work and to implement ideas together in Community partnerships. This idea must be applied both for the providers in various fields (initial training, continuing training) and in order to remove the institutional or organisational obstacles which impede the global efficacy of systems and, above all, their ability for innovation and development.

In terms of impact and leverage, the synergy of means is a central concern. From this point of view LEONARDO stresses, in particular, coordination with other Community actions. The actions supported within the framework of LEONARDO have mainly to do with the preparation of training schemes, the elaboration of innovative products and methods and the dissemination and mul-



tiplication of results. The LEONARDO programme should only touch, to a limited degree, on support for the implementation of training activities as such. Hence, the need for complementarity between the action programme and the funding earmarked within the framework of the European Social Fund which is mainly focused on the costs linked to the implementation of training activities downstream of their preparation and conception.

Other points in the programme should be stressed without us really being able at this stage to gauge their impact. Thus, it could be that the setting up of evaluation arrangements in partnership between the Commission and the Member States is likely to increase considerably the transparency and knowledge of Community action as well as its impact on national systems. In the same way the enlargement of the Community to take in Nordic countries, which have a long and, in many cases, unique tradition in the field of vocational training, is likely to introduce new dynamism and cooperation on new subjects. Here, we could mention the expe-

rience which they are going to input in the utilisation of information technologies or their approach to lifelong training.

The current action programmes draw to a close in 1994. They have produced significant and concrete results in order to create the foundations for transnational cooperation. These promising results have demonstrated the interest and support for more generalised and more systematised cooperation activities. LEONARDO aims to bring about the move to a higher level. It has very ambitious goals. The rationalisation of activities would help to increase its impact and transparency. This orientation is all the more important since the role of vocational training must be increased in order to reintroduce dynamism into European competitiveness and reverse the unemployment trend. Community support for the quality of systems and the ability for innovation must be a decisive factor in providing stimulus within a context of considerable budgetary pressure on the level of the Member States and also in order to bring about greater coherence in objectives and measures.

***“The goal of transversal cooperation between areas and the idea of lifelong learning are fundamental to the success of LEONARDO.”***

***“(...) LEONARDO stresses, in particular, coordination with other Community actions.”***

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**“For more than 35 years the European Social Fund (ESF) has been investing in people and has made a significant contribution to the building of a Social Europe founded on the premise that each citizen has the right to good basic training and to a secure job. (...) The most significant recent changes the ESF has undergone, both in terms of substance and procedures, occurred in 1988 in the framework of the general reform of Community Structural Policy covering the period 1989-1993 and in 1993 for the period 1994-1999. 1994 is therefore a watershed year - one which both marks the end of the first period and the launching of a new much more ambitious reform.”**

# Investing in people European Social Fund policy and priorities

Investment in human capital through education and training, in particular, is now universally recognised as an increasingly important factor in promoting economic growth and competitiveness.

For more than 35 years the European Social Fund (ESF) has been investing in people and has made a significant contribution to the building of a Social Europe founded on the premise that each citizen has the right to good basic training and to a secure job.

During this period the ESF has undergone some radical changes. Its tasks, scope, means and priorities have been regularly updated to ensure maximum effectiveness as an instrument in the implementation of a European human resource development policy.

The most significant recent changes the ESF has undergone, both in terms of substance and procedures, occurred in 1988 in the framework of the general reform of Community Structural Policy covering the period 1989-1993 and in 1993 for the period 1994-1999. 1994 is therefore a watershed year - one which both marks the end of the first period and the launching of a new much more ambitious reform.

## 1. The human resource dimension in the Community's Structural Funds: global assessment of the period 1989-1993

The aim of the Structural Funds is the promotion of economic and social cohesion, in particular the reduction of regional disparities.

Providing an effective response to such an important and ambitious challenge necessitates a long-term commitment and

the mobilization of significant financial resources as well as a coherent approach where the human resource dimension forms an integral part of the overall policy.

Community support for Structural Policy for the period 1989-1993 was organised around five overall objectives :

- development and structural adjustment of regions lagging behind,
- reconversion of industrial regions in decline,
- combating long-term unemployment,
- promoting the insertion of young people into the Labour Market.
- adaptation of agricultural structures and development of rural areas,

The ESF alone provided support to the third and fourth of these objectives and, in conjunction with the other Structural Funds, also contributed to all the others.

Between 1989-93 around 78 000 million ECU of Community resources (at 1994 prices) were devoted to this policy for the development of infrastructure, productive investment and human resources. About two thirds of this effort concerned the development and structural adjustment of the regions lagging behind, accounting for 70 million people, around one fifth of the total population of the Union. Total Community effort to develop human resources amounted to around 25 000 million ECU.

The impact of the policy implemented between 1989-1993 must be viewed in the light of the fact that its application took place during a period of growing economic and social difficulties.

### The development of regions lagging behind

Community financing represented between 1% and 3.5% of GDP in these re-

(\*) Views expressed represent exclusively the positions of the author and do not necessarily correspond with those of the European Commission





gions. In the case of Greece, Ireland and Portugal it amounted to about 10% of total investment.

Overall, during this period the regions concerned, especially Portugal, Spain and Ireland, improved their relative position in the Union in terms of GDP/head.

Although unemployment has risen in most regions, Community assistance has prevented further deterioration by contributing to the creation of around 500 000 jobs.

The Community's effort in relation to human resources development, where the gap characterising these regions is as important as in infrastructure and productive capital, has amounted to about 12 500 million ECU which constitutes around 50% of the total resources available through the ESF.

Particular emphasis was put on upgrading education/training systems and thus improving the **quality** of training on offer. At the same time significant effort was put into broadening **access** to education and training opportunities. The result has been an improvement in the level of scholarisation of those aged between 15-19 and 20-26.

Technical assistance has been the main instrument to overcome the blocks to development arising from weak mechanisms for programming, implementation, monitoring and evaluation. In many cases technical assistance has been used to modernise the institutional and legal framework. Decentralisation, progressive involvement of employers and trade-unions and reinforcement of the role of local authorities have often resulted from these changes. Certain structures, such as observatories, to anticipate labour market and qualification needs have also been set up.

### **Combating long-term unemployment and promoting the insertion of young people into the Labour Market**

Outside the regions lagging behind, the bulk of Community financing has been devoted to assisting national policies aimed at integrating the long-term unem-

ployed and the young into the Labour Market. Between 1989-93 about 7.5 million people benefited from actions involving 10 500 million ECU of Community resources.

The approach followed consisted mainly of the provision of basic training as a preliminary step for more advanced qualifications and access to jobs, followed by further training leading to recognised qualifications. For many years the Community has given special attention to the disabled and other groups facing particular disadvantage integrating into the labour market. This is reflected in the fact that about 10% of the effort has been specifically devoted to training disabled people and 4% to migrants.

Although Community financing, as compared to the national efforts in these fields, has been relatively modest it has made an important contribution to the development of innovatory approaches, especially as regards the integration of disadvantaged groups. Examples include: the promotion of schemes which combine work experience or training for the unemployed with improvements in the physical environment of an area; the development of co-operatives or other enterprises whose primary aim is to integrate the unemployed whilst also providing useful services or products.

Community financing in this field has had a significant impact on the transnational exchange of experience and best practice in themes such as local employment initiatives, creation of small and medium-sized enterprises, training of trainers, training in advanced technologies and maximising the potential of local employment creation.

## **2. New challenges and priorities: ESF policy for the period 1994-1999**

Despite the considerable progress made through Structural Fund intervention in the previous period Union is currently facing a serious economic challenge posed by the unacceptably high levels of unemployment. There are now close to 19 million people without work, over 50

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- development and structural adjustment of regions lagging behind,***
- reconversion of industrial regions in decline,***
- combating long-term unemployment,***
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***“There are now close to 19 million people without work, over 50 million people living at or below the poverty line and around 5 million young people with no qualifications or basic skills.”***

***“The key elements at the heart of the White Paper strategy are a partial shift from cure to prevention in tackling unemployment, a move away from income maintenance towards more active labour market measures and a reinforcing of local initiatives based on a partnership approach.”***

***“Between 1994-99 there will be a substantial strengthening of European Union financing of structural policy amounting to around 165 000 million ECU at 1994 prices (...)”***

million people living at or below the poverty line and around 5 million young people with no qualifications or basic skills.

These figures represent only the tip of the iceberg, perhaps as serious a problem is the **underemployment** of many of the citizens of the Union coupled with very low activity rates in many Member States.

Taking together these statistics point to the need for better management and use of the Union's greatest asset: its human resources.

To rectify this situation and respond to this critical challenge the Commission has devised a medium-term strategy described in the White Paper on Growth, Competitiveness and Employment which the Council endorsed in December 1993. The White Paper sets out a blueprint for a new employment architecture for Europe based on two fundamental aims: the need to achieve sustainable growth and the need to achieve more employment-intensive growth.

The key elements at the heart of the White Paper strategy are a partial shift from cure to prevention in tackling unemployment, a move away from income maintenance towards more active labour market measures and a reinforcing of local initiatives based on a partnership approach.

For the Union to survive in an increasingly competitive global market requires a fundamental transformation of the labour price, not only in terms of initial qualifications, but also of the life-long renewal of human capital. Young people will be unable to gain access to the labour market and workers to survive within it, if they are not provided with the right foundations of competence and motivation in schools and the opportunity to reinvest their human capital afterwards.

This in turn calls for a significant restructuring of the Union's employment, education and training structures. Such a restructuring requires not only the radical new policies set out in the White Paper but also substantial financial resources.

These increased financial resources will be provided mainly through the Structural Funds.

Between 1994-99 there will be a substantial strengthening of European Union financing of structural policy amounting to around 165 000 million ECU at 1994 prices. By the end of the century there will be further concentration in the regions whose development is lagging behind, which, with the addition of the new East German regions which are undergoing major change related to their incorporation into the market economy remount about 90 million people or about one quarter of the population of the Union. The greatly increased resources (around ECU 44 000 million for 1994-1999) available under the ESF will be harnessed to ensure maximum impact in terms of creating and maintaining jobs.

The reform of July 1993 considerably widened the scope of the ESF to include broad human resource development and the improvement of the workings of the labour market. A new objective was created to facilitate the adaptation of workers to change and enhance the preventative dimension of the fight against unemployment. Coverage under the ESF was also extended to include those at risk of long-term unemployment and exclusion from the labour market (see box).

New emphasis was placed on strengthening employment services, broadening the scope of direct aids to employment, extending the range and quality of initial training, and, in the least favoured regions, reinforcing education, training and research, science and technology systems.

In addition to this broader scope, the reform also made the ESF a much more flexible and policy driven instrument to enable it to provide a more effective response to the changing Labour Market requirements and specific development challenges facing Member States.

Three main priority themes for action have been established taking account of the recommendations of the White Paper :

1. Improving access to and the quality of education and initial training, especially through the progressive development of a youth guarantee “YOUTHSTART” and boosting human potential in research, science and technology.



2. Increasing competitiveness and preventing unemployment by adapting the workforce to the challenge of change through a systematic approach to continuing training.

3. Improving the employment opportunities of those exposed to long-term unemployment and exclusion through the development of a package of measures which form a pathway to integration.

Promoting equal opportunities for men and women in the labour market is an integral part of all three priority themes.

Emphasis on initial training and education is essential because of their long-term importance in promoting competitiveness (priority 1). Key measures will include support for guaranteed access to education and training leading to a recognised qualification and work experience as well as actions to minimize school failure and prevent drop-out and on laying the foundations for building an adaptable, multi-skilled, well qualified mobile workforce.

Support for the reform of initial training and education systems to take account of labour market developments, new technologies and economic development will be especially important in the less favoured regions. Evidence shows that inward investment decisions are heavily influenced by consideration of labour market quality and clusters of research and development facilities can help create pools of specialist skills that reinforce economic development.

To maximize the potential of human capital ways need to be found to assist the establishment of effective training systems within firms (priority 2). These could include the development of in-company training structures, the drawing up of training plans, management development and mechanisms to anticipate labour market trends. The particular difficulties faced by SMEs in addressing their own training needs in-house must also be taken into account. Distance training techniques and technologies in particular, open up cost effective and flexible training possibilities for employees of SMEs. Ways to improve the quality and relevance of training supply also need to be developed. Consideration could be given to the setting up

of decentralized networks of accredited training centres to provide continuing training for employees. Mechanisms to monitor and supervise actions and to certify the qualifications of both trainers and trainees will be especially important.

In this time of increasing unemployment and competition for jobs those most vulnerable groups in the labour market need special help to improve their employment prospects (priority 3). A comprehensive and co-ordinated package of measures which establishes a "pathway" for their reintegration into the world of work is required. In addition to the disabled and migrants other groups such as ex-offenders, drug-addicts, the very long-term unemployed, older people and young people with no qualifications, risk permanent exclusion from the labour market. Support is needed for guidance and counselling as well as training and placement into work and other accompanying measures adapted to the specific needs of the persons concerned.

Two new Community Initiatives in the field of human resources have been designed to complement mainstream ESF action. These initiatives will also contribute to the achievement of the above priority themes and they are characterised by their transnational, innovative and bottom-up approach.

The first of these initiatives concerns Employment and the Development of Human Resources. It has three distinct strands: NOW, aimed at the development of equal opportunities for women in the labour market; HORIZON, aimed at addressing the root causes of marginalisation and the resultant poor employment prospects of people facing specific obstacles to their entry into the labour market and YOUTHSTART promoting access to work or a recognised form of education or training for young people under 20.

The second initiative ADAPT is part of action concerning adaptation to industrial change. It has four closely linked aims; to assist workers, especially those threatened with unemployment as a result of industrial change, to adapt to increasingly rapid changes in the organisation and structure of employment; to help companies increase their competitiveness, pri-

***"Three main priority themes for action have been established taking account of the recommendations of the White Paper :***

- ***Improving access to and the quality of education and initial training, (...)***
- ***Increasing competitiveness and preventing unemployment (...)***
- ***Improving the employment opportunities of those exposed to long-term unemployment and exclusion (...)*** "

***"Two new Community Initiatives in the field of human resources have been designed to complement mainstream ESF action. (...)***

***The first of these initiatives concerns Employment and the Development of Human Resources (NOW, HORIZON, YOUTH START).***

***(...) The second initiative ADAPT is part of action concerning adaptation to industrial change."***



***“Experience from the past suggests that action is required in three key strategic areas: Overcoming under investment in human capital, (...) Strengthening management systems, (...) Enlarging partnership and the role of local actors (...)”***

***“Achieving optimum impact from the ESF requires both greater flexibility and strengthened evaluation.”***

marily by encouraging organisational adaptation and non physical investment; to prevent unemployment by improving the qualifications of the workforce and finally to develop new jobs and activities.

These priority themes have to a large extent been embraced by the Member States in their Structural Fund programmes for the period 1994-1999, however certain policy, institutional or procedural blockages to their implementation remain. Experience from the past suggests that action is required in three key strategic areas:

**a) Overcoming under investment in human capital**

A longer-term view needs to be developed and reflected in adequate financial effort allocated to human resources and in a better balance between support for

the operational costs of training and effort to improve the quality of training, education and employment systems.

**b) Strengthening management systems**

Weak planning and programming systems impair the effective implementation of Structural Fund actions. In particular there is a need for better co-ordination between departments and between national or regional authorities and other relevant actors. More transparency could be introduced in the granting of support and effort made to ensure that implications for employment and skills are routinely taken into account when decisions to fund infrastructure and productive investment projects are being made.

Better monitoring, evaluation and control are needed to improve the quality of co-financed actions. Improved data and quantified indicators will provide more reliable reference points against which to measure progress.

**c) Enlarging partnership and the role of local actors**

In addition to seeking closer inter-departmental cooperation, efforts are needed to promote a broader partnership involving NGOs, community bodies, local authorities, the social and economic partners and the private as well as the public sector to bring in new knowledge and expertise. Experience has shown the growing importance of the local dimension and of decentralised management. The development of implementation mechanisms which facilitate a bottom-up approach is especially relevant for combating exclusion and promoting adaptation to industrial change and tapping the new sources of employment through local initiatives where much of the experience lies outside the public domain.

Achieving optimum impact from the ESF requires both greater flexibility and strengthened evaluation. To be effective during a period of intensive structural and industrial change programming needs to be a dynamic and not a static exercise. Lessons learned from ongoing evaluation need to be applied to discontinue less effective measures and ensure concentration on the most important needs and the best operations.

<b>Community Structural Funds</b>	
<b>I. Objectives for the period 1994-1999</b>	
Objective 1	development and structural adjustment of the less developed regions
Objective 2	reconversion of regions or of the parts of regions seriously affected by the industrial decline
Objective 3	fight against long-term unemployment and facilitating the professional integration of young people and of persons threatened with exclusion from the labour market
Objective 4	facilitating workers' adaptation to industrial changes and to the changes in production systems
Objective 5a	accelerating the adaptation of agricultural structures
Objective 5b	development of the rural areas
<b>II. Basic principles of action</b>	
Concentration	... on priority questions and specific target-groups, by means of a regional approach
Partnership	... with national and regional authorities, organisms responsible for the preparation and the implementation of programmes
Additionality	... by co-financing of national and regional programmes and projects
Monitoring	... by the follow-up and the evaluation of results
<b>III. Available resources</b>	
Total budget of the Structural Funds for 1994-1999: ECU 141 471 billion, with ECU 96 346 billion for the Objective 1, i.e. a concentration of 70% in 1999 of all the Structural Funds on the Objective 1	



# The snares of the market economy for future training policy: beyond the heralding there is a need for denunciation

It is a particularly strenuous endeavour to reflect on a training policy for the future within the present context of a structural dislocation which is disengaging economic growth from employment (i.e. the phenomenon whereby producing ever larger amounts of wealth requires ever less human labour), accompanied by a production structure which is becoming increasingly globalised under the banner of liberalisation, deregulation, and privatisation of the economy. Under such conditions one is obliged to venture beyond the reassuring terrain of analysing data and heralding probable developments and possible problems into the less gratifying terrain of denouncing existing anomalies and problems which are the result of choices made by the social groups holding power within the framework of the prevailing institutions and procedures.

This denunciation is of a twofold nature. It is specific insofar as it addresses the four snares within which an ever more liberalised, deregulated, privatised and competition-driven market economy has imprisoned vocational training policy - and not only that policy. But it is ultimately a more general denunciation insofar as that same market economy results in the wastage of a considerable amount of the knowledge, skills, competences and creativity generated worldwide and the denunciation is also an appeal for resistance.

## 1. The human resource takes precedence over the human being

For about the past twenty years, under the influence of management schools and

the primacy of total productivity, human labour has undergone a further process of depersonalisation and desocialisation: the individual has become a corporate asset, a "human resource".

Promoted and sold as progress (is it not heard everywhere that the "human resource" is the most important resource that companies, countries can be endowed with?), the transformation of human labour from a "production factor" to a "resource" has had two main political and social effects. First, human labour at both the individual level (the worker) and the collective level (groups and categories of workers) is no longer, whether within the business organization or within society as a whole, an active interlocutor in dialogue, negotiations, conflicts and agreements with capital (another "production factor") in its individual form (the capitalist) or its organized form (groups, categories of capitalists).

The theory and practice of "industrial relations", by contrast, continued until the end of the 1960s to speak of human labour as an active interlocutor. Having become a "resource", human labour had ceased to be a social subject, henceforth to be organized by "capital-enterprise" and the "economy-society": both of these strove and strive to draw from the available human resources the greatest possible contribution, at the lowest possible cost, to the productivity and the competitiveness of the company and the country.

The second effect: stripped of all significance as a social subject, the human labour resource became an object, fair game for being bonded in the service of productivity and positioned outside any political, social or cultural context. Within



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headed the FAST programme (Forecasting and Assessment in Science and

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**Confronted by the challenges posed by "dislocation which is disengaging economic growth from employment" and "a production structure which is becoming increasingly globalised under the banner of liberalisation, deregulation, and privatisation of the economy" for planning future training policies the author affirms the need for "denouncing existing anomalies and problems" concerning the central importance of human resources and the need to raise its level of qualifications, the ineluctability of uses and planning carried out in the name of "the knowledge economy and modern information and communication", all of which risk leading to "one of the greatest wastes of creativity and knowledge ever organized on a global scale."**

*"(...) human labour has undergone a further process of depersonalisation and desocialisation: the individual has become a corporate asset, a "human resource"."*



***“(...) having become a ‘resource’, human labour had ceased to be a social subject, henceforth to be organized by ‘capital-enterprise’ and the ‘economy-society’ (...)”***

***“Positioned - particularly often in the theorising on the subject - at the centre of the battle for total productivity and total quality, the human resource is organized, managed, upgraded, downgraded, recycled and, above all, abandoned by the enterprise.”***

***“It is in relation to the tool that his continued presence and/or replacement is determined (...) with the consent of trade union organizations, these having espoused the cause of productivity for competitiveness.”***

***“(...) unemployment statistics which show that unemployment is more likely to affect human resources with no or only limited skills (...) But reality presents other constellations too. (...) unemployment is now increasingly affecting well and very well qualified people.”***

the contemporary framework of the market economy, the human resource is a resource which is available everywhere, the only limits to accessing it and exploiting it with abandon being of a monetary nature (the costs).

The first snare is very efficient. Like natural resources and commodities or the newcomer resource information, the human labour resource has no voice in society and is no longer represented within society. It does not, as such, have civic, political, social or cultural rights; the main thing it does have is a decisive contribution to make to the company's smooth running, further development and profit-building. It has become a means whose monetarized usage and exchange value is determined by the company's balance sheet. Positioned - particularly often in the theorising on the subject - at the centre of the battle for total productivity and total quality, the human resource is organized, managed, upgraded, downgraded, recycled and, above all, abandoned by the enterprise.

Having become a “resource”, the working man no longer has as his alternate reference point the man of capital. His alternate reference point today is the machine, usually a so-called “intelligent” machine, an intelligent tool, a robot. It is in relation to the tool that his continued presence and/or replacement is determined; this not only with the agreement of government authorities (whose role, dictated by the deregulated, privatized, liberalized and competition-driven market economy, is to train and make available to enterprise top-quality human resources) but also and in increasing measure with the consent of trade union organizations, these having espoused the cause of productivity for competitiveness.

## **2. The more skills, the better**

Given the prevailing mindset, the resulting postulate is clear: the better a company is endowed, courtesy of the state's education and training efforts, with skilled human resources, and the better a company is able, courtesy of tax incentives and government cash support, to deploy

those resources with a minimum of delay and additional costs, the more productive that company will be, the more competitive it will become and the better will be the chances of the persons concerned of finding and keeping a job.

Like everyone else, we too were convinced of the correctness and pertinence of that postulate. It is partly substantiated by unemployment statistics which show that unemployment is more likely to affect human resources with no or only limited skills and that the probability of finding a job or a follow-on job is greater for persons with a higher skill level.

But reality presents other constellations too.

Although better qualified people have a better chance than less qualified people of finding work, unemployment is now increasingly affecting well and very well qualified people.

Second, the more a company needs skilled manpower to be competitive, the more it is likely to reduce the number not only of unskilled workers (thus sowing conflict between the skilled and the unskilled) but also the number of skilled workers by replacing, for example, several “older” skilled workers (i.e. persons over 50 years of age) with one or two newly qualified young workers (as was recently the case at IBM, where thousands of engineering and management staff over 51 years of age were sent into early retirement; the result was a conflict of interest between different age groups).

Moreover, the more a company cuts back employment based on long-term or indefinite contracts and introduces a variety of other employment formats (with a fixed severance date, variable worktime provisions, job-sharing arrangements, etc. and with no guarantee of employment tomorrow), the more it nourishes competition within its own skilled workforce as each employee is at pains to keep his job. We are therefore seeing an increasing trend towards dissociation, especially in the developed countries of the Triad, in the United States and the United Kingdom, which is segregating the “permanent workforce”, accounting for some 20% of a company's total workforce, from the



remainder of the workforce who are employed on the basis of thousands of special arrangements, the main characteristic of which being to transform the individuals concerned into a magma of human resources with a status which is highly unstable, precarious and vulnerable from all points of view.

A new process of social stratification is now setting apart the segment of the skilled and highly skilled workforce who fail to find well paid, stable and guaranteed employment (the new "nobility" of excellent ability, education and competence) from all the remainder, mostly individuals with no or only limited skills, who at best might have the chance of getting a precarious, poorly paid and socially stigmatized job.

In other words, the priority attached to training and qualifications as the best admission ticket to the labour "market" is operating against the "human resource", imprisoning all those with no or limited skills in a snare of precariousness, instability and exclusion and those who are well or highly qualified in a snare of golden servitude to the needs of enterprise.

### **3. The economy is becoming a global economy, no one can dismiss the need for global competition. "Get yourselves qualifications, workers of the world!"**

They tell us, we hear it repeated everywhere, all the time, that the economy is becoming a global economy. The globalisation of markets, capital, and financial services in particular has taken place very forcefully and rapidly over the past twenty years in the wake of a US decree issued in 1974 liberalising the movement of capital. Since that date, the globalisation of capital and finance has strengthened and inflated the globalisation of the production of goods and services, of trade, of companies, of corporate strategies, and of the markets for investment goods and consumer goods. All of this

has been made possible by - among other factors - the globalisation of modern information, communication and transport technologies, the impact of which, only now becoming apparent, will be much stronger once the famous global information and communication superhighways are in place.

This recent globalisation of economies has given a considerable kick to competition on markets which have become global, open and no longer offering the sanctuary formerly to be found behind "national frontiers". The globalisation of economies is therefore launching every company, every town, every region, every country into an open confrontation with other companies, towns, regions and countries in arenas from which will emerge triumphant, or at least as survivors, only the strongest, the most competitive, those with the oldest battle scars and those who were astute enough to prepare themselves in good time for the new scuffles associated with globalising markets. Competition, everyone competing against everyone else across the globe, is thus now considered as being the major "must" for every economic agent, whether private-sector or public-sector.

To be competitive in a liberalised, deregulated, privatised and globalising market, every company is obliged, so the theory goes, to adopt a strategy of reducing production costs and improving the quality and range of its goods and services by making sure that it is present, either directly or vicariously by means of strategic alliance and cooperation agreements, on all the most solvent and profitable markets. Only thus will a company be able to reward its shareholders and ensure its future survival and growth.

One of the most efficient options open to companies for achieving this goal is that of making "aggressive" and intelligent use of human resources, especially those segments thereof which are at the various extremes: the best and the worst qualified, the best and worst paid, the oldest and the youngest.

It complies with the logic of the war of global competition that policy for training and recruiting human resources is primarily directed towards:

***"(...) the priority attached to training and qualifications as the best admission ticket to the labour "market" is operating against the "human resource", imprisoning all those with no or limited skills in a snare of precariousness, instability and exclusion and those who are well or highly qualified in a snare of golden servitude to the needs of enterprise."***

***"It complies with the logic of the war of global competition that policy for training and recruiting human resources is primarily directed towards:***

- training and utilising the best qualified manpower at the most agreeable cost***
- opting out of offering training for unskilled and semi-skilled workers in favour of using the unskilled and semi-skilled human resources (...)"***





***“National governments and their administrations, having decided that their main purpose is to create the “local” environment which is most favourable to their “national” companies’ competitiveness, accordingly opt for a policy designed to supply “local-national” companies with the human resources which are best suited and most easily adaptable to the requirements of a liberalised, deregulated, privatised, competition-driven global company.”***

***“The term “adaptation” underlies a principle which inspires all vocational training policies and programmes in all countries of the world.”***

***“(…) to arrive at the belief that knowledge is the fundamental resource of the new economy and that, by extension, the human resource, being the place for the production, transmission and dissemination of knowledge, is the cornerstone of the new globalised economy is an easy step for the reasoning mind to take, and in some respects minds are quite justified in reasoning thus.”***

□ training and utilising the best qualified manpower at the most agreeable cost (which is increasingly leading to strategies for relocating certain production activities to sites anywhere in the world where skilled labour is available at very low cost; for example: the relocation of Swissair’s accounts management to Calcutta).

□ opting out of offering training for unskilled and semi-skilled workers in favour of using the unskilled and semi-skilled human resources available in the poorest of the cheap-labour countries, often at extremely low cost (which has long since resulted in strategies to relocate operations to countries in which the price of the human resource is less expensive by a factor of 30 or even 50 than in the most highly developed countries of the world).

With an economy which they want to be further liberalised, deregulated and privatised, companies can cast around at will in accordance with their needs. Their objective in such circumstances cannot be to generate employment or provide the best possible training for the largest possible number of workers throughout the world. As indeed companies have openly stated in no uncertain terms, no, that is not their objective. Their objective is to generate profit and, in order to do so, to be competitive. And it is in order to be competitive that they “exploit” the human resource wherever they consider that such exploitation is the best, most profitable course of action for themselves.

National governments and their administrations, having decided that their main purpose is to create the “local” environment which is most favourable to their “national” companies’ competitiveness, accordingly opt for a policy designed to supply “local-national” companies with the human resources which are best suited and most easily adaptable to the requirements of a liberalised, deregulated, privatised, competition-driven global company.

Two words have become buzzwords: excellence and adaptation. We all know where the systematic cult-like pursuit of excellence leads. The scintillating skylark mirror transpired to be a snare. When taken to be a “must”, the principle of adaptation is no less a snare.

The human resource has no alternative to adapting to the requirements of the company, to the constraints of the market and to the onward march of technological progress.

The subjugation of man and labour to the imperatives of technology within the broader context of the imperative for global competitiveness has never been as total as at the present time. It is seldom that a businessman, a scientist, a bureaucrat, a technocrat, a politician speaks of the need to adapt technology to the requirements of human labour or the rules of competition to the needs of people, especially those in urban areas, remote regions and the least developed countries. It is seldom acknowledged that there is a need for the enterprise to adapt its investment policy and organizational structure to accommodate the need to train its workforce for becoming an informed and active participant in the management of that enterprise and the development of a citizen-enterprise. The predominant demand remains that of adapting the individual to the technology and the market. The term “adaptation” underlies a principle which inspires all vocational training policies and programmes in all countries of the world.

It is in the logics of adaptation to modern technologies that the snare of competition-driven globalization has found its economic “rationality” and its social “legitimation”.

#### **4. Knowledge has become the fundamental resource for the new globalised economy based on information and communication**

The “knowledge economy”, the “information economy”, like the “knowledge society” and the “information society”, are the new catchwords used to signify the transition presently being undergone by our developed economies and societies which are termed “industrial” for their being founded on material resources and physical capital (equipment, infrastructure), towards “different” economies and



societies founded on immaterial resources (knowledge) and immaterial capital (software, information and communication services).

Given this context, to arrive at the belief that knowledge is the fundamental resource of the new economy and that, by extension, the human resource, being the place for the production, transmission and dissemination of knowledge, is the cornerstone of the new globalised economy is an easy step for the reasoning mind to take, and in some respects minds are quite justified in reasoning thus.

Research and development policy - and in its more general format science and technology policy as a whole - then becomes a key policy for the new knowledge economy and society.

R&D policy is everywhere being placed in the service of companies, these being considered as the main agency for autonomously organising, managing, utilizing, and disseminating the immaterial - otherwise known as human - resource.

Improving the company's expertise and expanding its fields of knowledge in order to strengthen its competitiveness on global markets - that is the main objective espoused by science and technology policy in the United States and the Netherlands, in Germany and Japan, in Belgium and Canada, in Spain and South Korea, in Italy and Malaysia, in the United Kingdom (of course!) and modern China with its socialist market economy, in Quebec and in Argentina.

And study of official government documents and the policy statements of the other agencies concerned (universities, companies, management federations, trade unions, management associations) reveals that it's the same story with regard to vocational training policy. Vocational training policy should aim, first and foremost, to increase, proliferate and diversify the knowledge assembled in the country's human resource in order to allow companies to remain or become competitive.

What we are hearing is a veritable litany! The saint in whose honour this litany is being recited is the enterprise: an enter-

prise which claims and aspires to be increasingly a virtual enterprise, virtual because of the twofold dematerialisation it is undergoing by using knowledge as its main factor of production and by using information and communication as a vector for exploiting that knowledge.

The "virtual enterprise" is a reality which goes beyond the various forms of teleworking. The virtual enterprise regards itself as the organizational form most appropriate to the knowledge economy now emerging as this century draws to a close and the organizational form which will be predominant in the economy of the 21st century because it believes itself to be capable of mastering the acquisition and exchange of knowledge by virtue of modern information and communication technologies.

Everywhere it is said and said again that the main thing will be to master and market intelligence, that power will rest with those individuals and groups who hold "knowledge monopolies". Hence, the explanation reads, the importance attached to the "hunt for knowledge", the "hunt for expertise", the "battle for knowledge" and the corresponding education and training policies. Hence too the strategies devised by cities and towns to retain, thanks to the universities and training colleges, within their territorial confines the "sparkling brains" which will be capable of attracting new businesses into those towns and cities. Hence, in line with this pursuit, the policies aimed at developing "centres of excellence", one element attaching to those policies being increasingly selective vocational training policies catering for "elitist" niches with only few direct points of contact with their surroundings.

The knowledge economy and modern information and communication technologies, it is claimed, are transforming the nature of human work and shedding glory on the role of the human resource within a networking context - one in which that resource is territorially disinvested without, however, being geographically mobile. With the development of the knowledge industry within the framework of an economy unencumbered by frontiers and dominated by virtual enterprises, we are all becoming "human terminals". The

***"(...) study of official government documents and the policy statements of the other agencies concerned (...) reveals that (...) vocational training policy should aim, first and foremost, to increase, proliferate and diversify the knowledge assembled in the country's human resource in order to allow companies to remain or become competitive."***

***"What we are hearing is a veritable litany! The saint in whose honour this litany is being recited is the enterprise (...)"***

***"(...) If the transition towards the knowledge economy and the knowledge society continues to be guided by the imperatives of liberalisation, deregulation, privatisation and competition-driven globalisation, and if these imperatives continue to govern the development and use of modern information and communication technologies, it is certain that the training of the future will occasion the emergence and consolidation of a global social apartheid based on knowledge and the inequalities to be found within the human resource as a whole."***



***“That this wastage is not yet as total, ubiquitous and profound as it might become can be explained either by arguing that the market economy has not yet had the possibility of establishing and expanding its influence in all countries of the world and in all fields of activity or by the claim that throughout the world, both in our developed societies and elsewhere, pockets of resistance to the market economy have formed and continue to exist.”***

human resource will be engaged in virtual travel along the information and communication superhighways according to an itinerary determined by the new “knowledge monopolies”, and will be travelling thus in the service of the latter’s perpetuation.

In this context the human resource

□ is losing all contact with the traditional sites of wealth production; it is becoming nomadic without setting a foot outside the door;

□ will no longer have direct contact with a geographically and socially distinct community representing the place for defining and carrying out the distribution of wealth without, in lieu, acquiring contact with the global social community;

□ is becoming nomadic “groupware” (which is itself of increasing importance in relation to hardware and software);

□ is being transformed into a computer-steered “object” strolling in a virtual incarnation between profit centres capitalised at the global level and based on co-production networks; the virtual strolling will be done in accordance with new criteria developed to measure the productivity of the network-enterprise.

The snare set by reducing the human resource to an instrument dedicated primarily to serving the profitability aims of companies (which are aspiring to become increasingly virtual) and such companies’ ability to reward their shareholders (who are themselves becoming increasingly virtual) would be unprecedented in terms of its economic, social and political implications and consequences if it were not for another snare, that set by globalising, in the new, “noble” manner, that same human resource within the context of the knowledge economy and the knowledge society. And the more globalisation is carried out in the “noble” form, the more perverse this latter snare becomes.

If the transition towards the knowledge economy and the knowledge society continues to be guided by the imperatives of liberalisation, deregulation, privatisation and competition-driven globalisation, and if these imperatives continue to govern the development and use of modern information and communication technolo-

gies, it is certain that the training of the future will occasion the emergence and consolidation of a global social apartheid based on knowledge and the inequalities to be found within the human resource as a whole. The human resources who fail to meet the requirements of virtual companies, centres of excellence, technology centres, “intelligence networks”, information and communication superhighways, “intelligent” hospitals, etc. will be considered obsolete, worthless, and will be cast aside, abandoned. They will no longer be subjects for initiation into new depths of knowledge, nor will they be objects assigned to new retraining or skill upgrade schemes. This will apply as much to the human resource as an individual as to the collective human resources assembled in a village, a neighbourhood, a town, a region, a country and even a continent (the case of Africa springs to mind here).

The social segregation setting apart the “noble” human resources (organised in planetary professional guilds of the corporatist type) from the “populace” human resources (modern-day slaves employed in the new global work-sites of the new “intelligence empires” built up by the new “knowledge monopolies”, allied yet battling with each other within a global “hanseatic” network) - this social segregation will become an ever more pronounced fact of life.

## **The need to resist large-scale wastage**

Voilà, without wishing to dwell too long on the gloomy side, this is the itinerary set for training in the future, the future into which the market economy, the economic system still prescribed today for its self-asserted ability to govern the present and future global economy and society, is now leading all our countries.

It is a future associated with one of the greatest wastes of creativity and knowledge ever organized on a global scale.

All that is available in terms of competence, knowledge, and intelligence is being used and hierarchised by the powers that be in the countries which hold the



power to influence and control the future of the world, mainly by virtue of their apparent and real, present and future contribution to the productivity and competitiveness of companies transacting business in the solvent markets of the most highly developed countries.

That this wastage is not yet as total, ubiquitous and profound as it might become can be explained either by arguing that the market economy has not yet had the possibility of establishing and expanding its influence in all countries of the world and in all fields of activity or by the claim that throughout the world, both in our developed societies and elsewhere, pockets of resistance to the market economy have formed and continue to exist. That these pockets exist is the merit of those politicians, university dons, businessmen, trade unionists, local authorities, foundations, and associations which think and believe that the knowledge and intelligence of mankind should not be defined, evaluated, exploited, instrumentalised, disseminated and redeployed primarily in the service of an economy reduced to producing wealth for the minority who own and deploy monetarised capital.

They think and believe that making use of the knowledge and creativity of mankind should be intimately associated with an economy which aspires to be and is placed in the service of the material needs and the basic immaterial aspirations of the entire world population, this in a time whose generations are the first in the history of humanity to be planetary.

Seen in this light, training policy in its role as a producer and disseminator of the "collective assets" known as knowledge and skill, must be seen as an integral and decisive factor in the movement calling for the course of global development to be economically efficient, socially equitable and politically democratic.

Far from being reduced to a weapon for conquering markets and eliminating competitors, training should be an efficient medium for augmenting global communal public wealth.

Instead of excluding, training should aim to proliferate forms of co-existence and co-development. There is a need for forces in quantity to mobilize under this banner.

***"Instead of excluding, training should aim to proliferate forms of co-existence and co-development. There is a need for forces in quantity to mobilize under this banner."***



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# The complexities of assessing ESF performance: some specific examples

*During the 1990/91 academic year the ESF Assessment Unit asked us to coordinate the work of a group of European experts from institutions and countries with considerable experience in assessment work - CEREQ (France), IAB (Germany), ISFOL (Italy) and the University of Warwick in the United Kingdom, the aim being to draw up a proposal concerning the methodology for a retrospective evaluation of programmes funded with ESF assistance (Planas and Garcia 1991). We subsequently did an informal follow-up of the evaluation work done in some countries and carried out our own evaluation of various ESF-assisted activities in Spain.*

*The points made in this article are based both on our own work of coordinating and synthesizing traditional European practice in this field, as also on our direct experience at various levels of evaluating ESF and other Community programmes.*

The ESF Assessment Unit entrusted the author with coordinating a working group consisting of several experts from Member States in order to formulate a methodological proposal for ex-post assessment of programmes co-funded by the ESF. His work enables him to examine the main issues such an evaluation raises:

- the tension between the social logic and the economics behind training and employment policies,
- generating demand which is of necessity adapted to supply,
- difficulties in identifying groups,
- insufficiencies of data and indicators,
- the lag between assessment findings and planning new activities.

The proposal prepared for the ESF Assessment Unit contained the broad outlines for a methodology set out below (Planas and Garcia 1991).

The principal objective of the evaluation activity set in train with the reform of the Structural Funds was quite clearly to improve the effectiveness of Community structural operations. It was therefore considered of fundamental importance, among other measures, to strengthen and extend the traditional evaluation practice of the Member States, which consequently should be made an element of partnership so as to be able to count on the necessary cooperation.

It follows from this principal objective that the retrospective evaluation process should have a four-pronged approach:

- Assessing the effectiveness of operations in terms of their basic objectives.
- Determining effectiveness in terms of the aims of the operation (training, integrating into working life, facilitating return to work etc.).

□ Ascertaining the impact of operations in terms of their effects - positive and negative, expected and unforeseen - on the target groups and the region concerned.

□ Measuring the efficiency of operations.

Retrospective evaluation, therefore, has three aspects. The first is the analysis of effectiveness of operations in terms of the degree - full, satisfactory or less than satisfactory - to which the objectives initially set are attained. The second is the analysis of efficiency in the sense of optimum and rational use of resources allocated to the projects or programmes in order to achieve the stated aims, and the third the analysis of what has been achieved in terms of what may be called "equity". By this we mean the impact of the training programmes in creating equality of opportunity and either compensating for disadvantages or ensuring positive discrimination of the disadvantaged among job-seekers.

The working party's research enabled us to identify the following functions as ba-



sic to the retrospective evaluation process:

❑ Evaluation as a measurement process (quantity or quality). Every evaluation process involves measuring, but cannot be reduced to the mere measuring of a number of end results. In the first place the data obtained by measurement are not in themselves an evaluation. They need to be interpreted and this interpretation serves as the basis for evaluation. Secondly, not all the effects of an operation are quantifiable and a good evaluation needs to combine both quantitative aspects - which will subsequently have to be rated in terms of quality - and qualitative aspects.

❑ Evaluation as interpretation and as an instrument for decision-making. Evaluation is conceived as a process of creation and analysis of information contributing to more rational decisions.

❑ Evaluation as an internal training process. Evaluation is, or should be, a means of improving our knowledge of how the operation was conducted by those responsible and by the specialist professionals involved.

❑ Evaluation as an area for concertation. Evaluation is also, or should be, the basis for an interchange between the parties concerned, particularly with the social partners. Evaluation is not simply a gathering of results of limited usefulness but a means of involving the various parties.

These criteria can also be expressed negatively as what evaluation should not be. Thus

❑ Evaluation should not be reduced to the mere quantifying of operations and their apparently objective results.

❑ Evaluation should not be linked to administrative control and inspection procedures. It is, therefore, important to distinguish clearly between the objectives and methods of auditors and those used in retrospective evaluation.

❑ Evaluation should not be confined to an inventory of what has been achieved but should also analyse the processes with a view to using the findings in future decision-making. Evaluation always involves feedback.

❑ Evaluation should not become a form of self-reproach, stressing only the limitations of operations and the failures; it should mainly record the positive achievements, whether direct or indirect.

The ESF's evaluation policy is still in the process of development and no "traditional practice" has yet become established. The following comments, therefore, make no claim to weigh up the pros and cons of the evaluation process - for which in any case we have no specific data - but are simply a statement of what in our view are the formal and substantive difficulties involved in any attempt to evaluate ESF operations.

Evaluating ESF projects and programmes is an extremely complex undertaking because of their political implications, their scope and the diversity of the regions in which they are carried out.

As the evaluation activity encouraged by the administrative departments of the ESF becomes more generalised, questions and problems arise, of which we will here only mention those which seem to us most relevant. There are six points to be made: the contradiction between economic and social policies, the fact that demand necessarily focuses on what is available, an over-simplistic approach to the relationship between training and employment, the difficulty involved in identifying target groups, the lack of statistical data and indicators and, finally, the fact that the results of evaluation are not available early enough for use in planning new operations.

## **1. A social or an economic problem? Social assistance or productivity?**

The first problem involved in evaluating operations given ESF assistance - which we shall henceforth refer to simply as "ESF programmes" - concerns the basic objectives. Like many aspects of domestic policy, ESF programmes have two underlying rationales or aims - the social aim of helping the disadvantaged and the economic one of assuring the availability of substantial human resources of high quality and of increasing competitiveness.

***"The principal objective of the evaluation activity set in train with the reform of the Structural Funds was quite clearly to improve the effectiveness of Community structural operations. It was therefore considered of fundamental importance, among other measures, to strengthen and extend the traditional evaluation practice of the Member States (...)"***

***"The ESF's evaluation policy is still in the process of development and no "traditional practice" has yet become established (...) The following comments (...) are simply a statement of what in our view are the formal and substantive difficulties involved in any attempt to evaluate ESF operations."***



***“ESF programmes have two underlying rationales or aims - the social aim of helping the disadvantaged and the economic one of assuring the availability of substantial human resources of high quality and of increasing competitiveness.”***

***The “contradictions do not only exist at a macro-social level but that they also are replicated in everyday practice and inevitably produce certain perverse effects.”***

***“(…) the Member States from government level downwards may tend to respond by asking for what the Fund is ready to offer, submitting proposals notable for their conformity to ‘what is available’(…)”***

In fact, the coexistence of these two rationales merely reflects a contradiction inherent in evolving education policy and the development of training systems to which attention has already been drawn by a number of authors and which has been clearly stated by M. Carnoy and H. Levin (1985). According to this analysis, the welfare state and the economic structure of developed countries give rise to a clash between the will to democratise and the desire for equality and compensation for disadvantages on the one hand and the need to design and promote ways and means of encouraging competition, profitability and productivity on the other.

Moreover, it should be pointed out that opting for a programme focusing exclusively on output and profitability does not necessarily mean that the objective will be attained since, as J. Delors has stressed, the tensions that have been revealed by the employment crisis show that maintaining social cohesion - and consequently the struggle against exclusion - is a prerequisite for productivity and competitiveness.

At the same time, it is clear that these contradictions do not only exist at a macro-social level but that they also are replicated in everyday practice and inevitably produce certain perverse effects. The most obvious of these in the case of external programme evaluation relates to the criteria for effectiveness. Thus to give priority to an indicator such as the employment rate as a measure of the success of training activity may have the perverse result that when selecting people for training courses, the training bodies end up giving preference to those most easily employable, to the detriment to those who have greater difficulty finding a job.

## **2. Solutions in search of problems?**

The effort to define common objectives and initiatives for the European countries in general involves the risk that the responses emanating from the governments of Member States and from within the countries themselves will be adapted to the central proposals, and that managers

will be more concerned with meeting the requirements for programme approval than with formulating specific needs.

This relationship between proposal and response, which in this case concerns on the one hand the objectives and the initiatives of the ESF and on the other the Operational Programmes proposed by the various countries, has been referred to as “Solutions in search of problems” (Kingdon 1984).

This relationship increases the risk of diminishing the basic impetus and encouraging bureaucratic responses reflecting a desire to adapt to the various possibilities envisaged rather than creativity and initiative. This means that the Member States from government level downwards may tend to respond by asking for what the Fund is ready to offer, submitting proposals notable for their conformity to “what is available” having regard to Community objectives and initiatives, rather than working out, on the basis of the needs in the regions concerned, responses which have more bearing on problems that are shared in essence but which differ considerably in terms of form, degree and content from one country to another.

Clearly the clarity and specific nature of objectives is a prime condition for assessing the results obtained, and where such “conformist” replies are given the failure adequately to define the objectives will impede the smooth running of the programme and its subsequent evaluation.

This in turn brings with it two threats to the quality of the evaluation process - namely the difficulty of establishing criteria and assessing results of programmes when the objectives and the reference groups are standardised, so that certain realities are ignored, and the generating of tautological information which only discloses what has been known from the outset.

## **3. Relationship between training and employment**

Generally speaking, ESF programmes are based on training, which means that when





seeking to assess their impact we are faced with the problems caused by the relationship of training to employment, which has been described as "introuvable" (Tanguy 1986). Despite the complexity of the relationship between training and employment there is all too often a tendency to simplify by assuming a direct correlation between the training activity carried out and the subsequent job situation of those attending the training courses.

The current state of research into the relationship between training and employment (Planas 1993) directs us towards broader and more complex interpretation models that take account of aspects such as the encouraging of attitudes and expectations in trainees, the relationship between training and previous education, the relationship between training and other important characteristics of the trainees, unexpected uses made of training facilities, etc.

While one cannot expect the evaluation of ESF programmes to provide answers to the multitude of theoretical and practical questions raised by this relationship, it should be possible to avoid simplifications that inhibit the understanding and assessment of the programmes' real impact. It will probably be necessary to revise a number of assumptions underlying training policy that dwell excessively on the theoretical direct link between training and employment.

The complexity of the relationship between training and employment calls, for example, for considerable caution in deciding on the causes of the situation of trainees following the ESF programme without allowing for other factors, since too much optimism as to the effect of training on chances of finding a job may lead to a disappointing evaluation. Moreover, we have to realise that the provision of training may produce effects not directly reflected in terms of occupation but relevant in terms of professionalism.

The generalised response of offering training as a means of solving employment problems also brings with it two risks - that of making the unemployed responsible for their joblessness "because they are not sufficiently qualified" and that of using training indiscriminately because there

is no other type of response available and out of the false conviction that training cannot do any harm, even though its immediate relevance is not clear.

One of the essential tasks of retrospective evaluation of vocational training is to measure and interpret the effectiveness of the training system in helping the unemployed to find jobs or, where appropriate, of improvements in job qualifications through worker training.

Generally speaking, evaluation has tended to be excessively technocratic and linear, looking at the rate of job placement of unemployed trainees (the percentage of jobs obtained within a certain time after completion of the training course). Although this figure is of interest and relevant, it masks realities of which the evaluation should take account. Basically there are three aspects to be considered here:

(a) The link between rates of job placement and retraining and the economic situation of the country concerned (expansion, stagnation or recession), as also the ordering and regulation of the labour market and policies for promoting employment (job insecurity, employment incentives etc). The achieving of objectives (in terms of effectiveness of training activity) is influenced by the economic and employment situation in the region concerned and success or failure of a programme must be viewed in this context.

(b) The number of people obtaining jobs does not accurately reflect the link between training and the success of job placement in terms either of causality or of the correspondence between the type of training received and the type of job obtained.

(c) Moving on from the subject of causality, training implies the imparting of skills, knowledge and attitudes which may prove decisive in obtaining a job, even though there is no clear link between the training received and the job obtained. Such "indirect causality" is unclear and difficult to allow for in the evaluation.

***"(...)there is all too often a tendency to simplify by assuming a direct correlation between the training activity carried out and the subsequent job situation of those attending the training courses."***



***“Objectives 3 and 4 of the Structural Funds as they were up to 1993 summarise the main aims and the target groups for training activity - the long-term unemployed and young people. (...) It would, for example, probably be more useful to refer to possible situations or basic routes for occupational development than to identify all the groups as such in statistical terms (...)”***

#### **4. Defining target groups in connection with ESF objectives**

Objectives 3 and 4 of the Structural Funds as they were up to 1993 summarise the main aims and the target groups for training activity - the long-term unemployed and young people.

However, these two groups create real problems in practice. The requirement that a person be registered as unemployed for a certain time and for age limits to define groups of long-term unemployed and young people is, if nothing else, out of line with the current structure of the labour market and the occupational transition of young people from the educational system to the world of work.

There is a considerable volume of literature, starting with youth sociology, which revises and ultimately rules out the use of age groups as an indicator for the transition of young people to adult life (CEDEFOP 1994, Ganant and Cavalli 1993). Recent studies of job placement models for young people relate more to the route taken rather than to age. Far more important at the level of government youth employment policy is to bear in mind the various forms of transition to the world of work rather than narrowing or extending the range of ages at will as a function of a transition that is assumed to take longer and longer.

On the other hand, recent studies show that the group of long-term unemployed benefiting most from training activities assisted by the funds tend to be concentrated on the under-35s, with considerable emphasis on women with family responsibilities who are seeking to return to work (Casal, Garcia, Merino 1994). Moreover, applying the criteria of a certain number of months of registered unemployment is not satisfactory as a means of identifying the long-term unemployed in the strict sense of the term. It is obvious that while a person is receiving unemployment benefit the pressure to find a job is less, or non-existent in many cases, and that there may be a very close link between the time during which benefit is paid and long-term unemployment.

The revised ESF objectives 3 and 4 involve an important change which seeks to correct some of these shortcomings. Objective 3 now refers to those who are unemployed, seeking their first job or at risk of losing their job. Objective 4 refers to workers in employment who need re-training in order to increase competitiveness and adapt to change. This new proposal will have its advantages, despite persistent shortcomings, the two most important of these being in our view the definition of target groups in terms of the labour market and the levels of training activities.

It would, for example, probably be more useful to refer to possible situations or basic routes for occupational development than to identify all the groups as such in statistical terms - young people, workers, the long-term unemployed etc. It may be that after years of experience and effort to identify and define the groups at which government policy is to be targeted so radical a proposal for change may be surprising. Clearly we do not have the space here to justify the new approach but would refer to recent sociological research into the transition to working life which shows that consideration of the various stages of the transitional routes is more important than the social profiles of those concerned.

We would refer to the four main transitional situations (CEDEFOP, 1994; Casal, Garcia, Merino, 1994).

(a) Exclusion from transition to the world of work: this is a standstill situation affecting those people who in practical terms have been excluded from the primary labour market. There is no overlap here with the “long-term unemployed” since it refers to the difficulties of the persistently unemployed (predominance of periods of unemployment over their working life) and the secondary market.

(b) Transition from unemployment to employment: this includes people starting or resuming work after a period of inactivity. It includes young people seeking to make the transition from the educational system to working life, housewives seeking to return to work or migrants seeking work. What all these groups have in common is the need to



improve their job qualifications and to discover the best way to find a job (vocational guidance).

(c) Job rotation: this refers to people in work or unemployed in a circulating or rotating labour market. It includes young people with apprenticeship contracts, casual workers, those on contracts for specific jobs, temporary employees, etc. It also includes those employed in the secondary market. The element common to these various groups is the precariousness of their employment - finding a job and losing it, drawing unemployment benefit, taking another type of job etc.

(d) Stable employment. This term covers those members of the working population who are in stable employment with a contract of employment for an indefinite period or those who are self-employed. It therefore refers to a situation of permanence and job stability. Obviously this includes those adult workers employed in firms which may have to run down their workforce, who could therefore find themselves made redundant.

When drawing up and evaluating training and employment policies account must also be taken of the level of training of persons in the situations we have defined.

The target groups for training activities are thus defined by the fact that they are all in one of the situations described and have similar training levels.

## 5. Quality of Community and national statistical information

The quality of planning and assessment activity depends partly on the quality of statistical information sources in a particular area and relating to a certain population group or to specific activities.

As we pointed out in our technical proposal (Planas, Garcia 1991) a good evaluation policy should, if it is to have a certain continuity, make full use of available statistical information and if necessary improve the existing means for providing such information or create new ones.

Some of the problems we have referred to arise because of the shortcomings of statistical information systems. The varying rates of development of such systems from one Member State to another and the nature of the data available make it difficult in many cases to identify the situations defined above and provide elements of reference for programme evaluation and planning (CEDEFOP 1993, Planas, Garcia 1991).

There are at least three different problems relating to statistical information systems whose solution would considerably improve ability to effectively evaluate the activities of the ESF. They are:

- (a) The relevance of variables and their ability to define and demarcate.
- (b) The need for a historical picture to permit the analysis of development rather than of static situations.
- (c) The need for data specific to the region in which a programme is to take place.

The systems should be able to record changes and trends and the particular features of reference groups in the various Member States. In the case of the Community they should assist the mechanisms for pinpointing international correlations. This would mean establishing close links between the statistical information systems in the various Member States and Eurostat and the evaluation activities of the Structural Funds.

## 6. Feedback of results of retrospective evaluation

A final area of problems and difficulties, and not the least important, is the time taken to carry out evaluation on completion of a programme. Experience of evaluating the impact of training activities on target groups (job placement and retraining) has demonstrated the need for historical sequences of between three months and a year in order to analyse how training has produced significant changes in the careers of individuals (Planas, Garcia 1991).

However, the time elapsing between the start of a programme and its completion

***“The varying rates of development of such systems from one Member State to another and the nature of the data available make it difficult in many cases to (...) provide elements of reference for programme evaluation and planning (...)”***



***“Retrospective evaluation takes time and cannot contribute to the next two programmes.”***

plus the additional time necessary for evaluation and the time needed for searching out information and analysing results means that the conclusions and recommendations of the evaluation process cannot be fed back for planning the following programme because, for obvious reasons, this is put into effect before the previous one is completed.

Retrospective evaluation takes time and cannot contribute to the next two programmes. Moreover, since the evaluation of training activities is carried out in the light of the economic and labour market situations - which may be expanding or in recession - the resulting recommendations are also likely to be considerably influenced.

Finally, we would point out that the important role played by the Structural Funds

in the maintenance of social cohesion and economic development within the European Union demands that particular attention be paid to assessing the effectiveness of Community structural operations.

Evaluating the effectiveness and efficiency of such operations is, moreover, a fundamental element in the dialogue between the social partners and between them and the Commission.

For all these reasons we are of the opinion that the problems and risks we have discussed deserve particular attention by the Commission and other Community institutions at the level of policy-making and budget appropriations with a view to creating evaluation and information systems that are meaningful, transparent and comparable as regards the impact of EU structural activity.

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# The Community Initiatives

## “HUMAN RESOURCES”

### Experience and results of new cross-border programmes to promote vocational education and training and employment

#### 1. The Community Initiatives

With the reform of the Structural Fund in 1988, the European Commission was granted the opportunity for the first time ever to take the initiative in proposing to the Member States actions of special interest to the Community that would be eligible for promotion through the Structural Fund (see Article 11 of Regulation No. 4253/88 of the Council, amended by Regulation No. 2082/93 of the Council). The Member States normally draw up Operational Programmes in which they define their own responsibility for where the emphasis of their Structural Fund intervention will lie. The Community Initiatives now gave the Commission the means to supplement national policies and steer structural, training and employment policies from the Community perspective.

Since its introduction, frequent use has been made of this instrument. More than a dozen different Community Initiatives have been launched by the Commission in the meantime. 9% of Structural Fund resources, or in other words, ECU 13.45 billion, have been allocated to Community Initiatives for the six years from 1994 to 1999.

##### 1.1 Characteristics of the Community Initiatives HUMAN RESOURCES

The overwhelming majority of the Community's Initiatives have been carried out

under the overall control of the Regional Fund (EFRE). In 1990, first of all the three Initiatives EUROFORM, NOW and HORIZON were proposed in the area of human resources promotion. They thus came in to the sphere of responsibility of the European Social Fund (ESF) (see Official Journal of the European Communities of 29.12.1990, No. C327/05). The aim of EUROFORM was to promote new vocational qualifications and new employment possibilities resulting from the Single European Market. NOW was to focus on equal opportunities for women in the field of vocational training and employment and HORIZON was to improve the access of the disabled and other disadvantaged groups of people to the labour market. The overall budget of these Initiatives was ECU 760 million.

These Community Initiatives have a European dimension in that local projects are not sponsored unless they cooperate in cross-border partnerships with projects from other Member States. Priority is given to projects cooperating with partners from Objective 1 regions, in other words, the economically weakest regions of the Community. This is intended to promote transfer of experience and know-how into these regions while making a contribution towards the social cohesion of the Community at the same time. Community Initiatives to promote human resources are currently a first step towards including a European dimension in the area of vocational training and in the social integration of disadvantaged groups of people.



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**This paper examines the significance of the Community initiatives “HUMAN RESOURCES” of the European Social Fund. It examines in particular a number of problems in implementing these programmes and looks at the experience gathered and the results of the HORIZON programme in the Federal Republic of Germany. The assessments are based on surveys carried out by me, the author of this paper and my colleagues at the “Research Unit for Vocational Training, the Labour Market and Evaluation” in Berlin (see bibliography at the end of the paper).**

*“With the reform of the Structural Fund in 1988, the European Commission was granted the opportunity for the first time ever to take the initiative in proposing to the Member States actions of special interest to the Community that would be eligible for promotion through the Structural Fund (...)”*

**Table 1**

**Budget of the Community Initiative EMPLOYMENT  
from 1994-1999 (in million ECU)**

Action area NOW	370 ECU million
Action area HORIZON	730 ECU million
Action area YOUTH START	300 ECU million
Overall budget Initiative EMPLOYMENT	1 400 ECU million

for matching cross-border partners. At other levels as well, there was insufficient clarity about what was to be done and too little mutual agreement: the Community Initiatives are intended to be innovative programmes, yet a definition of innovation did not exist. Although the Community Initiatives HUMAN RESOURCES were supposed to be conducted in close connection to other related Community programmes, an operative logic to achieve this desire for synergy was not evident.

Despite the weaknesses in their practical implementation, these Community Initiatives are programmes of the utmost importance from a European perspective, since they enrich mainstream intervention of the classic Social Fund with a qualitative, project-oriented component and they give vocational training and labour market policy in the Member States a common European dimension.

### **1.3 The Prospects of Community Initiatives HUMAN RESOURCES**

The decision has meanwhile been taken to prolong the Community Initiatives HUMAN RESOURCES from 1994 until 1999 - even if it is with the delay that is normal for the Commission and the objectives have been subject to minor change (see Official Journal of the European Communities of 1.7.1994, No. C180/10). NOW and HORIZON will be continued within the new Community Initiative "EMPLOYMENT AND DEVELOPMENT OF HUMAN RESOURCES". Another programme entitled "YOUTH START" to ease the integration of young people into the labour market has been added to the list. EUROFORM will be discontinued. The following budgets have been planned for the six-year period from 1994 to 1999, the time during which the programme will run:

In addition to these, a proposal has been made to set up an Initiative by the name of ADAPT in the area of the European Social Fund to help "employees adapt to industrial change" and to promote employment (see Official Journal of the European Communities of 1.7.1994, No. C180/09). It will supplement the new Objective 4 of the Social Fund which is chiefly directed at preventing unemployment through the timely further develop-

***"Transnationality was more a means and a necessary requirement for financing local actions rather than an original objective in itself to develop Community policies.  
(...) the Community Initiatives are intended to be innovative programmes, yet a definition of innovation did not exist."***

***"Despite (...) weaknesses in their practical implementation, these Community Initiatives are programmes of the utmost importance from a European perspective, since they enrich mainstream intervention of the classic Social Fund with a qualitative, project-oriented component and they give vocational training and labour market policy in the Member States a common European dimension."***

The Community Initiatives HUMAN RESOURCES differ, however, from classic Social Fund promotion not only in the fact that they are cross-border activities. Classic ESF intervention within the scope of Community promotion concepts are primarily directed at supporting large-scale labour market policies in the individual Member States. Consequently, they focus on an improvement in terms of figures and the individual measures are not a means of implementing Community policy. The Community Initiatives, on the other hand, are project-oriented programmes of a primarily qualitative nature.

### **1.2 Problems with implementing the Community Initiatives HUMAN RESOURCES**

The three Community Initiatives to develop human resources mentioned above were initially planned for 1991 until 1993, but because there were delays in implementing them, they were extended until the end of 1994. The reason for the delays was mainly that the Commission launched these Community Initiatives before the structures, procedures and information needed to run them were available. Community Initiatives were conceived chiefly as cross-border programmes, but transnationality was not a constitutive element in the development of the measures and projects in the Member States in most cases. Transnationality was more a means and a necessary requirement for financing local actions rather than an original objective in itself to develop Community policies.

Getting the practical work at local level under way was also hampered by a lack of synchronization in running the programme in the different Member States and by the absence of a suitable strategy



ment of personnel's qualifications. In all likelihood, the European Structural Fund will also contribute 1.4 billion ECU to promote ADAPT.

## 2. The HORIZON Initiative

The present and also the future HORIZON Initiative is intended to promote the vocational integration of the disabled and the disadvantaged. The overall budget of the programme up until now has totalled ECU 304 million for the three years of its promotion.

The demand for a programme to promote these groups is deduced from the situation of the disabled and other socially disadvantaged persons. In all countries of Europe, their plight is still characterized by occupational and social exclusion, despite the sometimes great efforts of the state to alter this predicament. Although many new jobs were created in the EU during the sustained period of economic upturn in the 1980s, the number of long-term unemployed rose constantly at the same time. Since the early 1990s, the initially insidious but later more obvious recession has made the integration of social problem groups into the labour market even more difficult. HORIZON is intended for people who are not only out of work but whose integration is particularly problematical because of the degree of their social marginalization.

From the statistical angle, the problem groups on the labour market mentioned above are chiefly characterized by their lack of training. And in these times as never before, vocational qualifications are the entrance ticket to the work force per se since the situation on the labour market must also be seen within the context of swift technological development which constantly generates new qualification requirements.

In the core areas of production, services and administration, requirements in terms of economic, technological and social key qualifications have become more and more demanding in recent years. Anybody with performance problems, a disability or other handicap, who is unable to meet these requirements, is confronted

with drastically reduced chances of finding a job. In the Federal Republic of Germany the percentage of unemployed in these groups is far higher than in other groups of the population. The unemployment rate among the disabled is twice as high as the average for the overall population. Furthermore, the disabled and other disadvantaged people remain unemployed far longer than average. A high level of uncertainty thus characterizes their economic situation and this in turn jeopardizes their social integration.

One cause of this problem is the more difficult access that these groups have to vocational training. Their resultant poor qualifications reduce their chances of being integrated into the labour market. For this reason, first of all training possibilities must be improved for these groups, and jobs which are adapted to the special requirements of these groups of people need to be created.

Unlike the programmes sponsored in the classic Actions of the European Social Fund, in HORIZON the specific problems of the disabled and the disadvantaged are the focus of attention. Whereas the Operational Programmes of the Member States are governed on the whole by attempts to find solutions to labour market problems, HORIZON Initiatives also tackle socio-political problems which are integral elements contributing to the social exclusion of the target groups of this programme. Of course the HORIZON Initiative does not finance social care. Its objective is to integrate the said target groups into the work force. However, with its HORIZON programme the European Social Fund gains a new socio-political dimension to supplement its labour market efforts, since the measures that can be promoted tackle the concrete, social living conditions of the disabled and the disadvantaged, which hinder the occupational integration of these target groups.

## 3. Experience and initial results of the HORIZON Programme in the Federal Republic of Germany

A summary has been made of the most important findings of an initial survey of

***The "(...) recession has made the integration of social problem groups into the labour market even more difficult."***

***Rapid technological developments generated new skill needs. "Anybody with performance problems, a disability or other handicap, who is unable to meet these requirements, is confronted with drastically reduced chances of finding a job."***

***"In the Federal Republic of Germany (...) the unemployment rate among the disabled is twice as high as the average for the overall population. Furthermore, the disabled and other disadvantaged people remain unemployed far longer than average."***

**Table 2****HORIZON participants in the Federal Republic of Germany**

The disabled	1 520 persons	(45%)
The disadvantaged	506 persons	(15%)
Migrants	1 353 persons	(40%)
Total number of participants	3 379 persons	100%

***“(...) HORIZON Initiatives also tackle socio-political problems which are integral elements contributing to the social exclusion of the target groups of this programme.”***

***The “assessment of the HORIZON Initiative in the Federal Republic of Germany” shows that “One important goal of the programme, therefore, equal participation rates among men and women, had not been achieved”, and that “the average level of school and vocational qualifications among the HORIZON participants was low (...) in all target groups” and that “almost half of the HORIZON participants had never held a job.”***

107 projects in the HORIZON Initiative and of a fairly representative selection of 1 217 sponsored participants. This summary has been based on an assessment of the HORIZON Initiative in the Federal Republic of Germany, conducted by the *Research Office for Vocational Training, the Labour Market and Evaluation* attached to the Berlin Institute of Public Administration and Law (FHVR).

### **3.1 Survey of Sponsored Participants**

Forty-five projects have been organized for the disabled, 22 for the disadvantaged and 33 for migrants. Six projects had mixed target groups and five projects had no participants in the true sense. At the time of the survey, 3 379 participants had been involved in the surveyed projects up until early 1994. They belonged to the following target groups:

Two-thirds of the participants were male: the percentage of women was lowest (25%) among the disadvantaged; the highest representation of women was in the migrant group (43%). One important goal of the programme, therefore, equal participation rates among men and women, had not been achieved.

The average level of school and vocational qualifications among the HORIZON participants was low. This was the case in all three target groups:

- Over two-thirds of the participants had no prior vocational training.
- More than 40% of adolescent participants had no final school qualifications.
- A further 45% had only obtained a lower secondary school certificate.
- The situation was even worse among disadvantaged young people: 54% had no final school qualifications whatsoever.

Almost half of the HORIZON participants had never held a job. The most common reason put forward by the participants for why they had never worked was their lack of vocational training. Many HORIZON participants were subjectively burdened by other social problems as well, however:

- 40% of all participants had accommodation problems.
- One third suffered from loneliness and a feeling of being alone.
- One quarter suffered from feelings of guilt.
- Alcohol and drug problems played a role for less than 10% (according to the information they themselves gave).

The disabled were somewhat under-represented compared with the disadvantaged. However, the programme managed to reach certain people among the disabled who have been sponsored far too little within the scope of other promotion programmes. Hence, 8% of the participants were mentally disabled and 14% were emotionally disabled. An above-average number of these participants were from workshops for the disabled. Their integration into the work force of an enterprise has at the same time opened up new paths for their occupational promotion. The physically and sensory disabled were extremely under-represented at 5% and 3% respectively.

The HORIZON Initiative has managed to reach target groups among the disadvantaged whose objective and subjective deficiencies place them at a severe disadvantage in the labour market. These target groups include in particular unemployed young people who have no school qualifications and young foreign girls and women.

### **3.2 Conducted Measures**

The resources of the HORIZON programme have allowed much more attention to be devoted to the psychosocial supervision of the participants in these projects. In this way, measures to promote their occupational integration could be upgraded to the benefit of the target groups.

The vocational training measures have mainly been conducted in the metalwork-





ing and woodworking areas, in office and commercial occupations and in various branches of the service sector. The decision to specialize in these areas of training was rarely based on specific regional labour market analyses, however. Just under 25% of the projects only have conducted standard training granting the participants recognized qualifications. Most of the projects have simply given participants certificates of attendance which no doubt have limited value on the labour market.

### 3.3 Transnationality

Cross-border cooperation is one of the conditions that must be fulfilled before a programme is subsidized. The established partnerships have not always been optimal, however. The highest degree of correspondence has been at the level of the target groups; the objectives and contents of the training programmes have been far less well-matched.

The contents and form of these cross-border cooperation programmes have often remained relatively noncommittal. The lack of a clear concept about common goals has been evident. Only 40% of the projects have had common working plans with their partners. The lack of synchronization in the time schedule (see above) has also cut short the length of the cross-border cooperation and consequently diminished the success in achieving the programme's goals.

The greatest importance has been attached to the relatively vague exchange of educational concepts, whereas only about half the projects have attempted to exchange teaching material and curricula and only a small number of projects operating close to the market have exchanged products and methods.

Many projects have not managed to exchange general information; only seldom has the cooperation, which is normally typical of such projects, namely working out a joint topic or the exchange of concrete products and materials, been given serious consideration.

Participant exchange has played a relatively minor role, even bearing the differences in the specific target groups in

mind. The cultural dimension has been the principal aspect in any exchange; from the professional angle, the yield of cross-border exchange at this level has probably been rather meagre.

Most project organizers gravely underestimated the amount of effort required to plan and run cross-border activities. This also indicates that this entire area requires more careful planning.

## 4. Conclusions for future Community Initiatives

In view of the results of the programme assessment outlined in the previous section, some preliminary conclusions can be formulated for future programmes.

### 4.1 Quality of Training Measures

Seen as a whole, the projects sponsored under HORIZON provide a range of vocational education and training programmes related to the circumstances of the participants. The professional quality of the training measures could still be considerably upgraded, however. The following steps could be recommended in this context:

- When planning vocational training measures, the potential employment prospects of the participants in the regional labour market should be taken more into consideration.
- Greater attention needs to be paid and additional efforts must be made to improve the current inadequate and unsatisfactory certification practice. Participants should be given the chance to obtain proper vocational qualifications.
- Although many projects prepare their participants for subsequent employment, the support they give them in looking for a job should go a good step further and bring participants into contact with the working world and with enterprises.

### 4.2 Transnationality

The following could be starting points to upgrade the professional quality of cross-border exchange.

- Partner projects should be optimally matched. The following features could be taken into consideration:

***“The HORIZON Initiative has managed to reach target groups among the disadvantaged whose objective and subjective deficiencies place them at a severe disadvantage in the labour market.”***

***but***

***“Just under 25% of the projects only have conducted standard training granting the participants recognized qualifications.”***

***“The contents and form of these cross-border cooperation programmes have often remained relatively noncommittal. The lack of a clear concept about common goals has been evident.”***

***“Most project organizers gravely underestimated the amount of effort required to plan and run cross-border activities.”***



***“Seen as a whole, the projects sponsored under HORIZON provide a range of vocational education and training programmes related to the circumstances of the participants. The professional quality of the training measures could still be considerably upgraded, however.”***

***To improve the quality of transnational exchange “(...) the certification of the training the participants receive in the partner project” is an extremely important aspect.***

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□ Target group, differentiated according to the type of disability or social disadvantage;

□ Age, level of qualifications and degree of disability of the participants;

□ Programme objectives and related instruments to achieve these objectives.

□ Project partners should have at their disposal staff who have the foreign language competences required for cross-border cooperation. Cooperation between the partners should be formally secured, a common objective should be defined and reflected in working plans.

□ The partners should define a principal, focal objective for their cooperation project (e.g. the drawing up of a curriculum or a module for lessons, working out economic foundations or an evaluation concept). They should likewise define the specific contributions that each of them is to make to achieve these objectives.

□ The cross-border activities must make a contribution towards improving the vocational qualifications and/or integration of the participants into the workforce.

□ An exchange of participants within the European partner project should involve professional training and practical work. If the exchange is to include a learning experience, it must be for an appropriate length of time (at least a fortnight). In addition to this, if participants are to work in their field in the partner project, this needs to be given precise planning and preparation by the project staff.

□ An extremely important aspect is the certification of the training the participants receive in the partner project. All testable specifications and standards have to be formulated for this. These will also help to upgrade the value of the qualifications the participants receive.

## **5. Superordinate requirements of the Programme**

As a result of the findings of the assessment of the HORIZON programme in the Federal Republic of Germany, it is to be recommended that the professional quality of the vocational promotion of disad-

vantaged groups in the labour market be improved within the framework of the new Community Initiative EMPLOYMENT. Organizational, curricular and methodological-didactic training concepts should most definitely be developed further and promoted in order to allow this group of people to obtain vocational training qualifications. More flexible opportunities for vocational training should most definitely be made possible; new models of stage-based training should be tested and the time schedules of training courses should be made more flexible to allow for individual learning pace. Not least important, such activities to upgrade the quality of the Community Initiative EMPLOYMENT would most certainly promote the long overdue general updating of vocational training in Europe.

New modular training models could be developed and tested in cross-border cooperation. If possible, they should also lead to qualifications that prepare the bearer to pursue a specific occupation. These are quite high goals which can scarcely be realized by project organizers alone. At the level of the Member States, such intentions must generally be backed by corresponding agreements between the social partners and the chambers and trade associations. Of course, this is also a European subject, however. At Community level, there appears to be in particular an increase in the exchange between the Community Initiative EMPLOYMENT and the new European vocational training programmes such as LEONARDO and SOCRATES. Specialist discussions should focus on current practices and future developments in certifying training and continuing training and - in connection with this - the creation of a European vocational training area. CEDEFOP, whose prime tasks include the development of vocational training in Europe, would seem to be predestined to deal with these issues.

Common further training, cross-border partner projects could also be purposefully promoted to improve the quality of Community Initiatives HUMAN RESOURCES. This is a further important field of work both for the European Commission as well as for CEDEFOP and also for the national coordinators in the Member States.



# Training in Europe grows closer - PETRA projects successfully completed

PETRA has been the European Union's largest programme to promote the vocational training of young people and to prepare them for adult life and gainful employment. The programme was launched in 1988. A second stage began in 1992 and came to a close at the end of 1994. The programme promoted various measures and initiatives. These included stays abroad and on-the-job training for trainees and young employees in another Member State in addition to international cooperation in matters concerning vocational counselling and vocational training.

One of the programme's goals was to build a European network of training partnerships (ENAP/ENTP). This network has worked on the joint development of training modules for the vocational education and training of young people as well as joint training and continuing training for trainers. Between 1988 and 1993 a total of 820 projects were welcomed into this network of training partnerships (see table). Two of these projects were run in the Member States of Germany, Spain, Italy and Denmark.

The PETRA programme provides a forum for a great many initiatives to exchange training and information. In 1991, the research centre of the Commerce and Industry Training Association of Hesse in Frankfurt (Bildungswerk der Hessischen Wirtschaft e.V.) launched a project which was to focus on the construction of a product. A number of German and foreign training centres were to cooperate in this work which would include information meetings and exchanges among the participating trainers and trainees. The aim of the entire project was to allow those involved to become acquainted with the training systems of other European countries, to promote cooperation between trainees in different vocational

fields and to further understanding of the other Member States' cultures.

## The "Recycling Machine" Project

The German enterprises Carl Schenck AG in Darmstadt, Leica in Weilburg, VDO Adolf Schindling AG in Frankfurt and Babenhausen as well as Spain's Instituto de Maquina Herramienta (IMH) in Elgoibar and the private educational institute En. A.I.P. in Bologna, Italy were recruited for the first project. Thus not only different countries and but also different institutions were coordinating their efforts. In Germany, enterprises took part in the project. By contrast, in Spain, an extra-plant institution and in Italy, a non-enterprise vocational training institution were involved.

The German enterprises appointed trainees from the second and third training years to take part in the project. At this point in their training, the young people have gained the basic knowledge required for their occupation and have begun to acquire specialized know-how. At the same time, efforts were made to ensure that the trainees would be continuing their training throughout the entire course of the project.

An appropriate product needed to be found for the cooperative effort within the training. To this end, the head of the project, Mr. Calchera (the Commerce and Industry Training Association of Hesse) called upon the training directors of the German enterprises to develop ideas. Proposals were presented in September, 1991 and, after the pros and cons were weighed up, a decision was taken in favour of a **recycling system for electronic printed circuit boards.**



### Uwe Lorenzen

Director of Training and Continuing Training  
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Babenhausen

**Training programmes are the most important tools available to the European Commission to promote vocational education and training in the Member States. Among the vocational training programmes, PETRA is the most comprehensive (1988 to 1994). Part of this all-embracing programme includes cross-border cooperation among innovative projects. In the following article, Director of Training Mr. Uwe Lorenzen reports on the development of two projects which were devised by young people and their trainers in training centres in Germany, Spain, Italy and Denmark from 1991 to 1994.**



***In Italy (...) "the project's partners met for the very first time. They discussed preliminary time schedules and exchanged information on their cities, countries and training systems. (...) A certain amount of scepticism was evident about the chances of success of the dual system should it ever be introduced to Italy."***

***When (...) "all the trainees and supervisors involved in the project from Germany, Italy and Spain held their first coordination meetings" (...) it turned out, that there were some problems of understanding.***

***Since then the trainees (...) "appreciate the importance of a common language and English classes."***

The next step consisted of enlisting partners in other countries to take part in the project. After this hurdle had been cleared, a meeting was arranged in Bologna for the training directors and trainers responsible for the project. On this occasion, the project's partners met for the very first time. They discussed preliminary time schedules and exchanged information on their cities, countries and training systems. During the meeting, the Italians gave a highly practice-oriented presentation of the training in their institute. In addition, lectures on the educational systems in Spain and Germany were delivered at the University of Bologna. A talk given by the author on the dual system was followed by some very interesting questions. A certain amount of scepticism was evident about the chances of success of the dual system should it ever be introduced to Italy.

At the end of this meeting, the participants approved a rough concept for a machine which would recycle electronic components from printed circuit board assemblies. Each training group was assigned the task of planning the construction of a different component of the system with the trainees in their home country. Based on this agreement, the groups in the different training centres began making plans, experimenting with preliminary designs and taking the first steps towards implementing the project. For its part, the training department in VDO, Babenhausen was assigned the task of producing a machine to separate the electronic components from the printed circuit boards. The training group encountered more difficulties than had initially been expected. After due consideration and preparatory work, it was decided that the only possible solution would be to shear off the electronic components. The German training enterprises coordinated their efforts for the first time at a meeting held on the premises of the Commerce and Industry Training Association.

In May and June, 1992, all the trainees and supervisors involved in the project from Germany, Italy and Spain held their first coordination meetings in Elgoibar. The Spanish host families received the trainees warmly, thus promoting further cooperation. Communication problems did arise, however. When the trainees'

knowledge of English proved insufficient during project meetings or in the homes of their host families, they were forced to resort to body language. The trainees quickly realized and can now better appreciate the importance of a common language and English classes. During their second visit, the German trainees took part in training in the Spanish Institute. They brought home with them many new impressions of Spanish culture and the Spanish training system. Following their return to Germany, the motivated trainees made such quick progress that the assembly of the entire project could be discussed in Italy in August, 1992.

By "PETRA Week", organized as a European project week for November 1992 by the Commerce and Industry Training Association of Hesse, the project had reached an important milestone: the individual mechanical parts were shipped from the participating countries and were assembled by all the trainees in VDO, Frankfurt (see photo: **Assembly of recycling system**). At this point a few problems still had to be solved before everything could actually be fitted together. For example, the pneumatic and electronic controlling system was still missing. In the spring of 1993, it was delivered from Italy and attached to the recycling apparatus. All the supervisors, trainers and trainees applauded enthusiastically as the entire system was put into operation for the first time. The work was such a success that the recycling system has been exhibited at fairs, presentations and in all the participating enterprises.

## **The "Mobile Weather Station" Project.**

During PETRA Week, the Commerce and Industry Training Association of Hesse also organized a "Europe Day". New partners from the Netherlands and Denmark were present. The next project was to be jointly planned and carried out with these new associates. During the day, supervisors from the participating enterprises presented their training systems and project tasks to the vocational school teachers, training heads and representatives of other educational institutions attending the event.



With the participation of the Technical School in Aalborg, Denmark, work began in the spring of 1993 on a second project, a weather station. This project was also divided up into individual components:

- ❑ The training department in VDO, Babenhausen undertook the development of the sensor and the electronic equipment to evaluate the data.
- ❑ VDO, Frankfurt developed the interface between the sensor and the computer.
- ❑ En. A.I.P., Bologna devised a meteorological satellite receiver capable of evaluating received data.
- ❑ IMH Elgoibar developed the satellite antenna tracking device.
- ❑ The Technical School in Aalborg was responsible for the personal computer graphic representation.
- ❑ The training department of Schenck, Darmstadt built a wind generator to provide an independent source of electricity so that the weather station could be operated in open country or on board a ship.

During this project, too, meetings were held in Denmark and the other participating countries to coordinate efforts and exchange information. The work progressed swiftly. Preliminary difficulties, which are commonplace with such complex systems, were taken care of during the first project. The components from the German enterprises were assembled by the trainees in the open air in Odenwald on 23 September 1994. The readings were represented on a specially developed analogue display.

### Evaluation

In retrospect, these projects, carried out under the auspices of the PETRA programme, were of great value to all involved. This unique combination of practical work and exchange of information on different training systems and cultures brought the participants, the training centres and the countries closer together.

This overall positive evaluation of the work carried out in the project was by no means guaranteed from the outset. Different countries with different training

***“This unique combination of practical work and exchange of information on different training systems and cultures brought the participants, the training centres and the countries closer together.”***

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***“In the enterprises, the acquisition of key qualifications was promoted through the various projects.”***

<b>PETRA: Stays and projects abroad according to Member States</b>				
Action Member States	Stays Abroad	ENTP-Projects	Youth Initiative Projects	Information and Counselling Centres
B	1015	56	106	3
DK	852	42	71	1
D	7430	96	151	10
GR	1134	57	96	1
E	4585	100	109	0
F	5723	89	129	4
IRL	552	51	83	2
I	5501	92	112	2
L	219	33	16	1
NL	1682	53	53	1
P	1232	59	73	2
UK	5506	92	130	1
EU Total	35431	820	1129	28

Source: Task Force Human Resources 1994



***“This type of cooperation and the understanding for other cultures which it brings helps to promote the integration of Europe.”***

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systems were involved in the project. There were also differences in the facilities of the participating institutions and in their educational practices. There were, however, common denominators which balanced out these differences: on the one hand, technology, and on the other, the division of the project into individual components. This technological orientation and the assignment of tasks at short notice made it possible to overcome the differences in the levels of qualification of the participating adolescents and young adults.

The trainers and the trainees from the different countries were highly motivated and enthusiastic throughout the project. Working independently in their enterprises, they came up with solutions to the tasks which had been assigned to them. Any problems with the mechanical and electronic interfaces were able to be clarified at the project meetings, which were run for the most part by the participating trainees. In this way, all the difficulties

and problems which arose could be dealt with successfully.

In the enterprises, the acquisition of key qualifications was promoted through the various projects. These projects demanded a high level of creativity on the part of the trainees and promoted their specialized, methodological and social competence. The regional and international cooperation can be described as highly successful.

In VDO, Babenhausen, the importance of a common language in the working world has been recognized for years. All trainees receive additional training in the form of an English course. The trainees benefited from this language training during the project meetings with their foreign partners.

All the participants greatly enjoyed the cultural and social programmes. This type of cooperation and the understanding for other cultures which it brings helps to promote the integration of Europe.

Assembly of recycling system



CEDEFOP



# Binational Training of Young Foreigners

In the coming years there will be an increase in the demand for skilled workers who have not only completed well-grounded vocational training but who also have a sound knowledge of foreign languages, are familiar with the working habits and mentalities of other countries and are thus able to be employed in internationally oriented fields of work. Cooperation between national education systems has to be strengthened if we are to meet the growing demand for competently trained skilled workers in the future.

The Cologne-based Institute of the German Economy has therefore been conducting binational pilot projects for the vocational training of young foreigners since 1988. It is supported in its endeavours by the Federal Ministry of Labour and Social Affairs and the European Social Fund.

The first pilot project of this type was set up in 1988 for young Greeks. It was followed by comparable projects for young Spaniards in 1991, for young Italians and Turks in 1993, and in 1994 a German-Portuguese training programme was launched. While the Frankfurt-based *Bildungswerk der Hessischen Wirtschaft* (Commerce and Industry Training Association of Hesse) has been responsible for the German-Greek programme since the end of the pilot phase in June 1992, the Institute of the German Economy continues to be responsible for the coordination and scientific supervision of the other binational programmes.

## Background

The background of these pilot projects is as follows:

(1) The development of qualification requirements in the European economic

area underlines the importance of well-grounded vocational training to secure the employment chances and career opportunities of the individual. Jobs for the unqualified are increasingly on the decline.

(2) Europe's labour markets, which have been almost exclusively national markets up to now, are tending to merge into a unified EC labour market.

(3) The range and the type of qualifications demanded of skilled workers are changing as a result of the growing internationalization and globalization of markets.

(4) Young foreigners living in the Federal Republic of Germany are clearly under-represented in the German vocational training system: Whereas more than 70% of young Germans complete some form of vocational training, only about 40% of young foreigners currently gain vocational training qualifications.

(5) A strong point of young foreigners is generally their bilingualism. If their competence in this area could be integrated into vocational training and promoted in the subject matter of their training, it would open up additional chances for them on the labour market.

(6) Last but not least, an important role is played by the attempt to develop specific qualification concepts to give substance to individuals' plans to move freely between nations in their occupational fields.

## Concept

The starting point for setting up the pilot projects was a study which the European Centre for the Development of Vocational Training (CEDEFOP) commissioned the Institute of the German Economy to con-



**Werner  
Lenske**

Head of the department "Qualification Research" and the project group

"Binational training measures" in the Institute of the German Economy Cologne

**Since 1988 the Institute of the German Economy Cologne (IW) has been organizing binational pilot projects for the vocational training of young foreigners. These projects were set up since young foreigners are severely under-represented in vocational training in Germany. The projects also are a response to developments in skill needs in the European economic area. The range and the type of qualifications demanded of skilled workers are changing as a result of the growing internationalization and globalization of markets. Workers need, in addition to specific vocational training, job-related foreign language skills and knowledge of working life and the mentality in other countries.**



***The starting point for setting up the pilot projects was a study commissioned by CEDEFOP***

***“One of the most time-consuming tasks at the outset of each pilot project was to select the training occupations to be taken into consideration (project occupations).”***

***The selection procedure was based on “(...) job profiles in the employment areas that were identified as having a promising future.”***

***The results (...) were “binational qualification profiles (...)” which “corresponded best with the “binational qualification profiles” and which were covered by the education systems of the countries concerned (...)***

***“(...) the selection of potential training occupations (...) does not suffice to achieve the goal of binational training coupled with improved chances on the labour market for the participants in both countries.”***

duct in 1986 with a Greek partner institute (Institute of Economic and Industrial Research IOBE, Athens) (see Holl, Uwe & Lenske, Werner & Hassid, Joseph & Kioufalas, Kyriakos: *Berufsbildung der zweiten Generation griechischer Wanderarbeiter in der Bundesrepublik Deutschland - Griechenland*. Berlin 1987). An analysis of the educational situation and qualification profiles of Greek migrants in the Federal Republic of Germany and the occupational integration process of emigrants returning to Greece highlighted the need to set up training courses which would take account of developments in the labour markets of two EC Member States as well as migrant workers' educational motivation and qualification needs.

The basic concepts underlying such educational measures were defined as follows:

(1) In order to support the occupational mobility of employees between Greece and Germany and to make migration a calculable risk for the individual, vocational training programmes that meet the occupational requirements of both EU Member States are to be set up.

(2) When selecting appropriate courses for relevant binational vocational training, it is necessary to consider economic developments and the medium-term demand for skilled workers in both countries.

(3) General multi-national trends in changes in the demand for qualifications and in qualification requirements should be incorporated into the planning and organization of binational vocational training programmes in order to secure long-term employment opportunities.

(4) Accordingly, vocational training programmes must be run in those occupational fields and jobs which are characterized by an increasing demand for skilled workers not only at the present time but in the future as well. The crucial task in the concrete selection of training measures is, therefore, to isolate those jobs and occupational fields for which there is a growing demand as a result of the economic and technological developments in both countries and for which the qualification profiles are relatively similar in both countries.

One of the most time-consuming tasks at the outset of each pilot project was to select the training occupations to be taken into consideration (project occupations).

Since the vocational training systems in the countries concerned differ immensely and even occupations bearing the same title might have very little in common, the process for selecting “project occupations” was based in the first place on employment fields or “typical” job profiles in the employment areas that were identified as having a promising future. The results of this procedure were “binational qualification profiles” reflecting the common requirements which skilled workers in both countries had to meet in the relevant employment areas/jobs.

The next step was to identify the (training) occupations which corresponded best with the “binational qualification profiles” and which were covered by the education systems of the countries concerned. It was important that most of the transnational features of the job profile were covered. This list of “European occupations” was compiled in each case in close cooperation with the competent national manpower office and Ministry of Labour.

In all the binational training measures, the selection committees ended up with project occupations in the following three large generic occupational areas:

- (1) Commercial occupations
- (2) Metal engineering occupations and
- (3) Electrical engineering occupations.

All the experts involved in the selection process were of the opinion that these areas offer the best growth and employment prospects for the future. They likewise believed there would be a growing demand for binationally qualified skilled workers in the countries concerned.

## **Organization**

Although the selection of potential training occupations is a necessary prerequisite, this alone does not suffice to achieve





the goal of **binational training** coupled with **improved chances on the labour market** for the participants in **both countries**. A specific task of the pilot projects is to prepare the participants during their training in Germany for the **concrete vocational requirements in the respective partner country**.

Accordingly, the following overall conditions, which the CEDEFOP study considered to be essential, were established:

### Training within the dual system

Training of young people within the German dual system forms the basis of the training in the projects. This is to help achieve the first goal, to promote the participants' chances of employment in Germany.

### Additional tuition

Parallel to their training in one of the recognized training occupations in Germany, the young foreigners receive occupation-related specialized classes in their mother tongue ("additional tuition"). The purpose of this additional tuition is to take account of the occupational qualification requirements of both countries during the young people's vocational training in Germany. This is also seen as a way of actively integrating the specific bilingual competence of the young people into their training and of fostering it. This additional tuition is given three hours a week over the entire period of their training, i.e. for three to four years depending on the training occupation. The planning and curricula of the additional tuition are supervised by binational teams of experts, made up of experienced vocational trainers/practitioners from the respective countries.

### On-the-job training

Apart from receiving additional tuition, trainees are given several weeks on-the-job training in the respective partner country. The principal aim of this practical training is to extend the theoretical knowledge imparted in the additional tuition classes and to give the young people as

realistic an insight as possible into the requirements and working conditions in the respective job in the partner country. Another (additional) function of this on-the-job training is to support the binational exchange of information on differences and similarities in vocational training, job profiles, job requirements, work organization, employment structures, etc. in Germany and the partner countries.

### Certification

The institutions involved in the project in the Federal Republic of Germany and the respective partner countries have developed certification procedures to document the vocational knowledge acquired by the young people. This is to benefit the bearers on their later entry into the labour market and help them to utilize the specific (binational) qualifications they have acquired during their training in the project. Mutual political recognition of vocational qualifications in the countries involved was not the prime concern behind the certification process. The certificates are instead intended to be a meaningful documentation of the basic and additional knowledge acquired by the young people and a description of the fields of work they might potentially be employed in.

### Experience

Since 1988, all in all about 700 young people have opted for this type of training (**see figure below**). About one-quarter have successfully completed their training to date and 92% of these have joined the workforce in Germany.

The results of a survey of 243 participants' experience with these pilot programmes are now available.

When asked about their motives for participating in the project, 94% of the participants indicated that they thought the additional training courses would enrich their vocational training ("continuing training"). An equal number of participants considered that their participation in the project would be a good basis for being able to work in their so-called home

***"The institutions involved in the project in (...) the respective partner countries have developed certification procedures to document the vocational knowledge acquired by the young people. This is to benefit the bearers on their later entry into the labour market and help them to utilize the specific (binational) qualifications they have acquired (...)"***

***94% of the participants (...) considered that their participation in the project would be a good basis for being able to work in their so-called home country at a later date."***

***"The practical training in their country of origin helped the young people to gain a more concrete idea about their occupation and working life in their home country."***



***“A number of the German companies (...) participating in the binational pilot projects (...) consider the opportunity to train young people bilingually an important reason for supporting these programmes.”***

***“More than one enterprise in three thinks that the changes brought about by the Single European Market will result in a growing demand for skilled workers, who are fluent in the relevant technical language and familiar with the specific occupational activities and work processes in other Member States of the European Union.”***

country at a later date. As many as 87% thought that the project would improve their employment prospects in their country of origin and more than one in two (53%) believed that their additional qualifications would improve their chances on the labour market in Germany and their careers in the long run (55%). It is interesting to note that about one in seven of the young people (14%) participated in the project at the expressive wish of their training enterprise and that 8% would not have taken up vocational training in the first place had these specific programmes not been available.

Asked whether on the basis of their own experience they would encourage other young people to take part in such a training programme, 96% gave an unequivocal affirmative reply and 95% said that knowing what they now know, if they had the choice today, they would again decide to join in the programme.

The practical training in their country of origin helped the young people to gain a more concrete idea about their occupation and working life in their home country. Up until now these ideas, if they had any at all, were moulded by what they had experienced during holidays spent there. 25% of the trainees indicated that

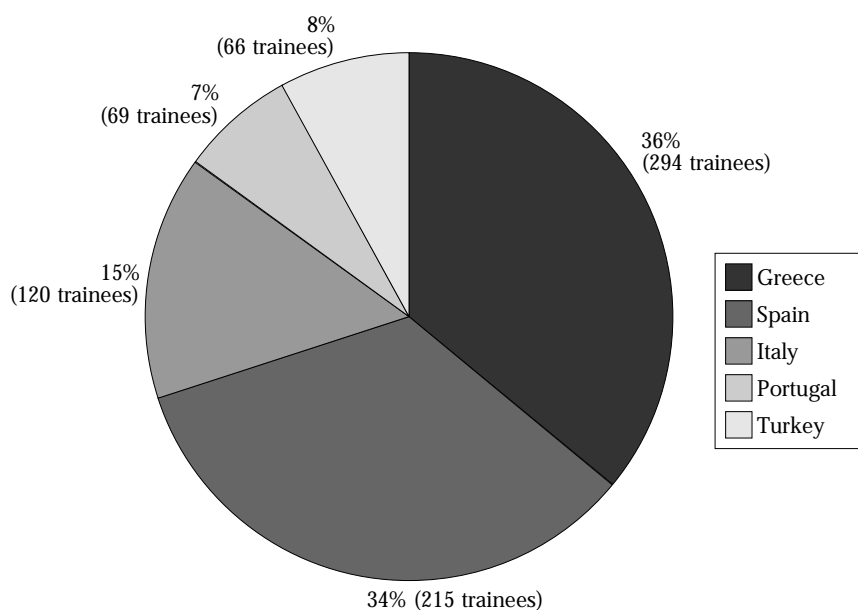
their ideas about working life in their home country had changed greatly or very greatly. 61% said that they had modified their views “partly” or “slightly” and only one in seven (14.6%) said they had not gained any new insight during their practical training. It is interesting to note that 70% of the trainees indicated that the experience they gained during their practical training was important and useful for the later progress of their training in Germany. Obviously the on-the-job training abroad boosted the young people’s motivation with the result that their individual career plans coincided more and more with the set training objectives. As many as 60% could imagine working in their home country at a later date. One in five even had concrete intentions in this direction and only 2% of the participants dismissed the idea as out of the question for them personally.

A number of the German companies which have been participating in the binational pilot projects since 1988 consider the opportunity to train young people bilingually an important reason for supporting these programmes. Above all, companies which have or plan to have business relations with firms in the respective partner country or who have subsidiaries there see a growing demand for bilingually trained skilled workers and thus welcome such training initiatives.

The overwhelming majority of the German training enterprises involved in the projects believes that skilled workers with such additional qualifications will become more and more important in the future. Incidentally, these training enterprises are in favour of offering such training courses to young Germans as well.

More than one enterprise in three thinks that the changes brought about by the Single European Market will result in a growing demand for skilled workers, who are fluent in the relevant technical language and familiar with the specific occupational activities and work processes in other Member States of the European Union. One in five enterprises intends to employ their trainees once they have completed their training. They will be deployed in areas where the additional knowledge they have acquired will be especially useful and necessary.

**Participants in the Binational Projects  
(Total: 695)**





# European Local Authority Interactive Network on Ethnic Minority Policies



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*main responsibility is the co-ordination of the ELAINE network (European Local Authority Interactive Network on Ethnic Minority Policies).*

Launched in 1990 by the European Centre for Work and Society (ecws) in Maastricht (NL) and sponsored by DGV of the European Commission since 1 January 1993, ELAINE has become a reputable source in Europe as a network of expertise on ethnic minority<sup>1</sup> issues at the local (city) level. ELAINE specifically concerns itself with local policy action, as it is at this level that the immediate needs of ethnic minorities are addressed. The local authorities are, therefore, the front runners in finding innovative measures that combat the marginalisation of ethnic minorities.

As an established policy-oriented research centre with project experience in training, professionalisation, interactive networking, evaluation and monitoring, multiculturalism and managing change processes in organisations, the ECWS provides the ELAINE network with the expertise required for cities participating in the network to be able to see the comparability of ethnic minority issues despite their different historical, political or socio-cultural backgrounds.

One of the main goals of the network is to induce a learning process among cities that is based on learning from each others' experiences. The process is facilitated by providing local officers with practical means for discussion and exchange on common challenges and provides information on how the challenges are being met throughout Europe. The rapid development of the network (more than 25 active cities) makes it clear that cities are recognising the benefits of exchanging practical experiences on issues of multiculturalism. The success of the net-

work rests on the ever-increasing quality of formal and informal exchange among cities and on the progress they have made in gaining from each other's experiences and know-how. This increased quality of exchange is an important measure of ELAINE's worth.

There are three components to the working structure of the network: the co-ordination unit, the member cities and the steering committee. The ELAINE co-ordination unit (based at the ECWS) is responsible for co-ordinating, planning and organising the network programme. It acts as the intermediary between cities, and uses the expertise supplied by cities and additional research to supplement the information exchange. The member cities' main role is to provide information on their professional know-how through projects and experiences. The exchange of expertise is achieved through ELAINE activities and services (i.e., thematic workshops, surveys, the ELAINE Newsfax, the Infobank, attending meetings, representing the network at external conferences). Lastly, the steering committee is a group of contact people (mostly from ELAINE cities) who provide the co-ordination unit with on-going advice and support.

Experience demonstrates that it is not enough to provide documents showing a European comparison of issues and approaches tackled by cities. This information must be of practical use to European cities regardless of size, geography or historical background. This same information must also be customised to meet the particular needs of cities and takes the form of preparatory documents, active participation in workshops with project

**ELAINE is a programme of the ECWS supported by the European Commission, to promote cooperation and mutual exchange of know-how among local authority officers of cities in Europe dealing with ethnic minority policies. One area dealt with is (vocational) training for ethnic minorities and the role of the local authority therein. A description of some local initiatives are described and although no one city experience is entirely transcribable to another, ELAINE has created a successful forum for effective comparability of local policy initiatives and professional exchange at a European level.**

<sup>1</sup> Ethnic minority is the English working term used in the ELAINE network to refer to persons of different ethnic background than that of the indigenous majority population. As ELAINE is a multi-lingual network, the appropriate term for each country's context is used in the various network languages.



***“Over time, ELAINE cities have learnt the art of extracting common elements which can be useful for developing new approaches to policy and practice in their own cities.”***

***“The city of Antwerp is placing specific attention on improving communication in schools with high concentrations of ethnic minority children because of the lack of communication between the members of the board and staff, and ethnic minority children and parents.”***

2) CLEO Project, Cases in Learning (oriented) Organisations, ECWS, 1992.

visits and workshop reports. These are equally important elements in the learning process of member cities.

Although policy cannot be transferred to another city or country without taking account of the different contexts, it is important to note that through long-term, intensive exchange, the ideas and references shared can eventually be reflected in newer policies and measures. Over time, ELAINE cities have learnt the art of extracting common elements which can be useful for developing new approaches to policy and practice in their own cities. Those cities that have been with ELAINE since 1990 have continuously progressed on this point.

Evaluation is based on an iterative process between the actors involved and is embedded in the entire project approach through feedback from cities, the steering committee and DGV of the European Commission. One example is the inclusion of work group sessions on sub-themes in ELAINE workshops because cities requested further in-depth discussion on particular policy (sub-) themes. Interestingly, the requests from cities have become more detailed and sophisticated over time. This is an element of progress and consistent in the dynamic learning process in ELAINE.

## Vocational Training

The importance of vocational training cannot be underestimated in today's society, as it is no longer used merely as an answer to change (reactive role) but as a guide to the processes of change, to monitor change and to prepare people for continuing education or life-long learning (pro-active role)<sup>2</sup>. The labour market has developed into a fast moving, key-skills oriented work force where flexibility, polyvalence and social abilities are skills applied to all levels of the work force.

Vocational training for ethnic minorities is further important because the position and well-being of specific groups such as ethnic minorities is strongly dependent on the chances of finding and staying in employment. In addition, such training improves the knowledge of the language of the country of residence, as well as, promoting interaction among people.

Specific areas of concern with regard to vocational training and ethnic minorities include the provision of training programmes for ethnic youth and women. Access to and the participation in vocational training are two specific obstacles often due to inadequate training facilities, limited information and lack of language capabilities among ethnic minorities. A low level of support from family members is also a contributing factor.

The following is a descriptive overview of different experiences regarding local (vocational) training initiatives for ethnic minorities in Europe which is based on ELAINE network activities.

### Training initiatives in Antwerp (B)

The city of Antwerp is placing specific attention on improving communication in schools with high concentrations of ethnic minority children because of the lack of communication between the members of the board and staff, and ethnic minority children and parents. The concern is not solely based on language differences, but on differences of experience with school systems. Inter-cultural workers are being recruited to act as links between parents, teachers and students with the

### Pragmatic policy discussion in the ELAINE Network demonstrates that:

- Similarities are more likely to be found in cities facing the same concerns rather than by cities situated in the same country.
- More often than not, it is the local, grass-roots initiative that stimulates progress towards the integration<sup>\*)</sup> of ethnic minorities.
- Extracting (common) elements from approaches used in different cities is useful for developing one's own model for local policy and practice.
- Local authorities take initiative in areas where national policies lag.

\*) Integration implies a mutual adaptation on the part of members of society.



aim of improving the situation of ethnic minority students. A further effort to bridge the communication gap is the creation of customised language courses for migrant mothers because of their limited knowledge of the Dutch language. This lack of language knowledge hinders mothers from accompanying and supporting their children throughout their school development. The mother's inability to cope in a social situation is seen as negative for the child.

The efforts being made towards ethnic minority youth extends to the need for help in finding employment and in motivating part-time students. Those unemployed youth in part-time education require special help to motivate their entrance into the labour market. This need is supplemented by the fact that the business community is rarely interested in part-time students, especially those of ethnic minority in part-time education. The ethnic minority youth are provided with social and psychological help and are assisted to overcome the circumstances which have a de-motivating effect.

The private sector is also taking part in the provision of training for ethnic minority youth in Antwerp through a co-operation of private initiatives called "Vitamin W" originally established to help the low-educated, long-term unemployed, refugees, migrants and others with problems in finding work. Ethnic minority youth in part-time education are placed in work-experience projects of the community development organisation where they have participated in the transformation of an old school building into a community centre and rebuilding an old indoor swimming pool into a meeting and recreation centre. In these projects, the youths get on-the-job training and use the experience to find similar employment.

### **Training initiatives in The Hague (NL)**

The Hague is currently undergoing a policy to increase the quality and results of basic adult education. The strategy includes intensifying and centralising the courses being offered throughout the city. As a consequence, the voluntary nature of basic adult education is being reduced and the people who entered into basic

adult education for social reasons risk being excluded. As consequence of this situation, The Hague is placing specific attention on language training for ethnic minorities and on specific groups within this target group.

This year a non-intensive (2.5 to 5 hours per week), flexible (different locations) and temporary (maximum 1 year) 'step-up' language training course was established for foreigners with little or no education to ensure transfer to more intensive lessons in Dutch as a second language. The target group consists of people for whom the step to regular basic adult education is still too great, and people who are not yet certain whether basic adult education is the most suitable form of education for them. Potential students are given an introduction to basic adult education in the step-up group and are given the opportunity to explain their learning requirements and capacities under the supervision of an educational worker. A step-up group therefore serves as a type of extended intake. If it becomes clear that basic adult education is not the most suitable form of education, the student can be transferred to other facilities.

A further task which can be fulfilled by the step-up group is to comply with the requests from various organisations (e.g. basic adult education schools, community centres, mosques) to have basic adult education courses offered within their facilities. Women's groups are given priority. However, regular basic adult education groups do not always work well in non-basic adult education institutions. It is difficult to bring together homogeneous groups and to gather enough students for initiating a course. This is supplemented by the insistence of certain organisations to make a facility for basic adult education more attractive for their specific target group.

Step-up groups are now still in an experimental phase. Agreements are being reached with *receiver* organisations concerning course duration, the transfer to regular basic adult education and possible forms of socio-cultural work, childcare facilities and student numbers. The present funding allows for 12 groups offering 5 hours per week to be organised and students wishing to transfer to regu-

***"The private sector is also taking part in the provision of training for ethnic minority youth in Antwerp through a co-operation of private initiatives called 'Vitamin W' originally established to help the low-educated, long term unemployed, refugees, migrants and others with problems in finding work."***

***"The Hague is placing specific attention on language training for ethnic minorities and on specific groups within this target group."***



***“An initiative developing in The Hague for 1995 is opening institutions for basic adult education normally closed on Saturdays (...)”***

***“By means of an introduction/action project, foreign women and mothers are brought into basic adult education.”***

***“(...) The Hague launched study circles for elderly people of foreign origin (...)”***

lar basic adult education are given placement priority.

An initiative developing in The Hague for 1995 is opening institutions for basic adult education normally closed on Saturdays (often the only day in which working adults can take lessons). Ethnic minorities who have followed basic courses in Dutch at the workplace could in this way prepare on Saturdays for the NT2 (Level-II Dutch course) examination. Currently, institutions are unwilling to risk organising lessons on Saturday due to extra costs (extra opening times of buildings and overtime supplements for teaching staff). Via this project, it would be possible to determine whether opening the basic adult education institutions during the weekends would really fulfil a need. For the time being, a start will be made with two groups. If this experiment proves successful, Saturday lessons will be included in the regular course overview provided by institutions.

Ethnic minority women is a specific target group in The Hague and the city funds the Meeting Foreign Women foundation (stichting Ontmoeting met Buitenlandse Vrouwen) to arrange lessons at home for foreign women who are living in isolation. The target group of the foundation is incapable of independently entering into basic adult education, or making use of other facilities. It is hoped that following a period of lessons at home given by the foundation, these women would move on to group classes in basic adult education.

By means of an introduction/action project, foreign women and mothers are brought into basic adult education. As of 1 January 1993, one project worker was employed to recruit foreign women and mothers living in isolation to prepare meetings for starting up group lessons, in conjunction with the basic adult education institutions. This is a difficult job because it is very difficult to actually reach the women. Home visits and intensive counselling are often necessary and the information material developed for the project is not always understood. The basic adult education schools, which could fulfil an important intermediary role, often have no facilities for talking with the mothers. In addition, the lack of suit-

able classrooms for group lessons also creates difficulties.

The transfer of foreign women from lessons at home to group lessons at institutions for basic adult education is also a challenge. The target group often requires extra counselling and attention, which the institutions are unable to provide. As a consequence, large numbers of foreign women cease attending the courses. A special allocation of funds has recently meant that efforts could be made to improve the transfer rate. A covenant has now been signed between the foundation and the basic adult education institutions, in which the tasks and responsibilities relating to the transfer from home teaching to group lessons are laid down. A special registration system has been developed for the target group and the institutions may call upon the foundation when there is threat of newly-transferred students intending to drop out of the course.

One specific group that is often forgotten is elderly ethnic minorities. Elderly ethnic minorities undergo many difficulties in coping with growing old in a foreign country where they have limited social networks and little information on their rights and available care facilities<sup>3</sup>. In 1993 The Hague launched *study circles* for elderly people of foreign origin which not only contribute to keeping the elderly out of the care circuit for as long as possible but give the elderly a stronger feeling of belonging and involvement in the community. The methodology of the study circles calls upon the self-involvement and self-development of the elderly and can be geared towards any level of education (primary through university). Basically, a study circle is a group of elderly people (generally no longer involved in work) who together study a subject of mutual interest. In this process use is made of the knowledge and experience of the participants and the learning effects are just as important as the social contact. Interestingly, there is considerable interest in study circles for elderly ethnic minorities and there are 13 in existence. Each circle consists of 10 to 15 persons and it appears that a further 15 groups will be established. All supervisors are recruited from within the target group.

3) Report of the 1994 ELAINE workshop on Local Authority policy towards Elderly Ethnic Minorities, 26-28 May 1994.



### **ELAINE's workshop in Mannheim (D) on vocational training**

The role and participation of local authorities in vocational training policies is growing. This is exemplified in current activities of ELAINE cities and those shared during ELAINE's workshop on vocational training for ethnic minorities in Mannheim (December 1992). The participants of the workshop visited local support projects including a school with designated courses for ethnic minorities and an advice centre assisting disadvantaged students dealing with the move from a school to a work environment. The combination of classroom learning and practical work experience was demonstrated as an inherent characteristic of the German dual system.

Several interesting examples of training courses<sup>4</sup> for ethnic minorities were already operative during the Mannheim event and the discussion noted a development towards more decentralised approaches to vocational training (due to increased ties among local and regional labour markets) which was creating opportunities for local authorities to take the initiative and develop forms of participation in this policy area.

The German experience was particularly interesting to the United Kingdom participants because vocational training programmes for ethnic minorities in Germany demonstrated an institutionally-oriented approach, whereas in the UK, it is less structured and more self-organised (usually by ethnic minority organisations). The Dutch participants, also used to a less institutionalised system, were able to find similarities with the German dual system in key items such as providing more adequate facilities for vocational training, participation in co-ordinated projects with local training institutions, social welfare organisations, ethnic minority organisations and local industry (which, provides an important social network to surround the training).

Although all cities had common objectives in Mannheim, their methodologies varied according to contexts and competencies. Nevertheless, the opportunity to see how the different cities pragmatically dealt with similar policy objectives, allowed the local officers present at the workshop to return home with new insights and wider perspectives on policy actions that could lead to the development of policies that further respond to the needs of the ethnic minority population in their own city.

### **Closing remarks**

Building a European interactive network is not only a considerable undertaking, but a long-term process. Nevertheless, ELAINE's aim to guarantee an in-depth, interactive exchange of practical experiences of local professionals remains at the core of ELAINE's actions.

ELAINE's efforts facilitating access to information, contact between people and European developments on ethnic minority policies have already led to bilateral co-operation among ELAINE cities (in and outside the field of ethnic minority policy). The added value of self-initiated co-operation among cities in addition to network activities (namely, 'spin-offs') are part and parcel of the ELAINE network and European actions to foster co-operation among European States. In this way, the transferability potential of policy initiatives expands and professional know-how becomes more accessible through co-ordinated efforts.

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***"Several interesting examples of training courses for ethnic minorities were already operative during the Mannheim event and the discussion noted a development towards more decentralised approaches to vocational training (...)"***

4) Specific examples of training courses discussed were a guidance centre in Genk (B) that combines language training, theory classes and practical experience in companies for young unemployed migrants, vocational training schools in Stuttgart (D) with special classes for German and foreign youth with language and learning difficulties, and Black and ethnic minority enterprise and training centres in Sheffield (UK) offering foundation courses.



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# The Reform of Technical Education and Training in Great Britain.

## A comparison of institutional learning in Europe.

**The analysis made by the author of the way international comparative research is conducted and of the reforms in a national vocational training system in which he was involved highlights the limits and contradictions of exchange procedures and mechanisms between science, decision-making and policy implementation while emphasizing the importance of a comparative approach for apprenticeship. The author stresses the need for such an exchange in Europe and advocates broader reflection on the contribution this exchange can make to social policy.**

***This type of institutional learning is more important than "(...) the flood of recommendations, guidelines, programmes and pilot projects which can be found at this level of the EU."***

***The point of departure was my work on the British segment "(...) of a comparison of organization, vocational training and industrial relationships, which was to be added to an already running comparative study of France and Germany."*** CEDEFOP

### Introduction

This journal deals with issues in the charged arena between science and practice. One of the most important landmarks in my professional life was to become active in this charged arena and observe how scientific findings from international comparative studies influence the further development of a national technical education and training system. I firmly believe that this type of institutional learning through publications is extremely important and probably occurs more often than documentation reflects. These learning steps may include international elements although they operate outside the formal, international vocational education and training programmes in Europe. It is for this very reason that they are worthy of description. Their importance possibly even overshadows the flood of recommendations, guidelines, programmes and pilot projects which can be found at this level of the EU. In the final analysis they namely concern the vocational training policies of the Member States, policies which in accordance with the subsidiarity principle will surely retain their importance. I have therefore taken the liberty to analyse and report on my own experience. This experience mainly touches upon the following questions:

- Which leitmotifs are significant for the development of vocational training in Europe?
- How and what can we learn by comparing different vocational training systems?

□ How should the points of contact between science and politics - or public structures - be seen?

### Materialization and organization of a reform workshop

In 1975 I took up a position as a research fellow at St. Anthony's College in Oxford. Shortly beforehand my thesis supervisor in Münster had introduced me to visitors from Great Britain who were interested in the situation of German engineers, executives and entrepreneurs. They were keen to discover how British industry could improve its efficiency by drawing on the experience and practices of management and the education and training of technicians and engineers in other countries.

The immediate objective of my own work in the United Kingdom was to conduct the British segment of a comparison of organization, vocational training and industrial relationships, which was to be added to an already running comparative study of France and Germany. This was mainly 'basic research'. The project was structured according to the 'societal effect' approach in work, organization and industrial relations, which was developed through research conducted by the Laboratoire d'économie et de sociologie du travail in Aix-en-Provence (Maurice et al. 1982).

Although our approach had an interdisciplinary academic character, the initiative for the comparative study came from a





French governmental body which wanted to know why hierarchical differences in salary were much greater in France than in Germany. Thus the study was a mixture of commissioned research and basic research. Given this situation, I too was motivated to bear in mind guidelines for future applications and was called upon to meet the above-mentioned researchers visiting Münster. The party included Michael Fores from the Department of Industry, Peter Lawrence of the Department of Mechanical Engineering of the University of Southampton who at the time had just launched a project on German engineers on behalf of the Ministry of Industry, and Liam Hudson, Professor of Psychology in Edinburgh.

After taking up my position in Oxford, I stayed in touch with these colleagues in Great Britain. The most important exchange of information occurred during a series of meetings at the Ministry of Industry. Here we dealt in regular succession with and made comparisons at an international level on topics under the general heading: "Engineers and executives in industry - patterns of socialization, functions, work organization, organizational structures and industrial relations". A wide spectrum of people came to these meetings: industrialists, ministerial civil servants, scientists, journalists, political and work relations representatives. We discussed these subjects in an unusually open and easy manner, not at all restricted by formalities. A workshop atmosphere prevailed. As the organizer, Michael Fores proved to be provocative and stimulating. His preparatory and opening papers bore his undeniable signature and humorously provided for a positive atmosphere and a high level of involvement.

Attendance at these meetings varied according to the topic. Very quickly a core group of more or less regular participants emerged, however, and even met frequently between meetings. This hard core included in brief:

(1) Michael Fores, the organizer, was a civil engineer by profession with many years' experience, particularly in bridge construction in different countries (Greece, Turkey, Australia to name just a few). He then found himself in a more academic milieu, which - since he had

studied at Cambridge - was not so surprising as his down-to-earth practical disposition might have suggested. He was interested in issues concerning engineering professions and engineering from a historical, philosophical and economic perspective. This had led to his appointment as 'internal consultant' in the Ministry.

(2) Peter Lawrence had studied history before moving on to sociology. He left his tenure position as a lecturer in organization at the University of Strathclyde (Glasgow) to work on a temporary project on German engineers. During his military service he had acquired a knowledge of German language and culture.

(3) Ian Glover was a sociologist working on a doctorate on theories and research findings on management behaviour. He had an outstanding ability to compress an incredible amount of information into an unbelievably comprehensive bundle and still extract a solid line of theory. The sometimes violent tone of our arguments, which was highly favoured within the group, is best reflected in his publications (see e.g. Glover, 1992).

(4) I myself brought my project into the forum and felt that the discussions on engineering, engineers and business executives concerned me in two different ways. On the one hand, precisely those aspects which had been relatively important to my work in Münster were seen here from another point of view. On the other hand, I was able to build upon the interests which I had developed while flying and in the armed forces.

This inner circle met quite often privately, in varying constellations, and the meetings at the Ministry of Industry usually ended in a nearby pub. Both Ian Glover and Peter Lawrence had research contracts from the Ministry; I myself had none. However, the solidarity we had was less based on contracts and financing. More important was the slowly growing conviction that we were working together on an exciting project and we had much to share with each other. Although the core of the group consisted of scientists and researchers, we all emphatically agreed that current scientific conceptions and academic activity were leading to a dead

***A series of meetings were held at the Ministry of Industry.***

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***A group which consisted of scientists and researchers agreed "(...) that current scientific conceptions and academic activity were leading to a dead end."***

end. Michael Fores was the most vocal advocate of this position.

'More established' individuals also used to make their appearance in the group: Liam Hudson, who was working on perception structures among engineers and scientists; Alistair Mant, who had been a psychologist at the Tavistock Institute for many years and had just written a provocative book on British managers; the military historian, Correlli Barnett; and later on, the organization and management scholar, John Child. Some decisive groundwork was provided in an excellent survey of management research in Germany compiled by Brigitte May on behalf of the Ministry (May 1974). Peter Lawrence's engineers' project (Hutton et al. 1977; Hutton and Lawrence 1982) and my project (Maurice et al. 1980; Sorge and Warner 1986) produced further reports. In various constellations we also wrote articles for journals.

A large percentage of these papers was conceptual in nature or written for 'internal use' only. On the whole the larger group lived mainly from the fact that it pushed discussions far beyond the limits of available and verified articles and discourse. In the process, a wealth of hypotheses was formulated almost in passing and each of us could draw on these in our daily work.

The relative stability, complementary interests and thematic harmony of the hard core of the group prompted Michael Fores to call it 'the barbershop'. In England, a barbershop quartet is a small group which sings in chromatic harmony. The term originates from the days when barbershop employees used to sing at work to amuse themselves and their customers.

### **Leitmotifs for the development of vocational training**

After a year, the barbershop was 'singing in harmony' to some relatively well-defined leitmotifs which had become well-established by the end of 1976. They can be summarized as follows:

(1) The efficiency of British industrial enterprises is impaired by the limited pres-

tige which engineering and engineering occupations enjoy in the social hierarchy, the education system and the organization of enterprises.

(2) In Great Britain, engineering and engineering occupations not only attract far fewer highly qualified school graduates but in enterprises they also tend to lead to a dead end in terms of career development (Bayer and Lawrence 1977). Occupational advancement is usually linked with a generalist management orientation.

(3) Practical qualifications, detailed knowledge, expertise and stability in an occupational position are undermined by both the environment and formal structures (personnel policies, labour market). To this extent, the devaluation of engineering is part of an overall cultural and institutional syndrome. More highly regarded positions and educational paths stress change of discipline, de-specialization and frequent change of jobs.

(4) Enterprises pursue strategies which excessively accentuate financial, accountancy, commercial and political criteria. Attempts to 'de-technicalize' and de-specialize management have led to the neglect of engineering innovation, effectiveness and efficiency.

(5) Practical experience, vocational training and academic education have developed such a prevailing logic of their own in society that they all too often impede competence within organized structures. In the United Kingdom, more than anywhere else, competence appears to be an individually based, uncertified and untested result of an educational process which, as a whole, cannot be controlled. The status which special educational institutions enjoy is overrated in comparison with practical and specialized aspects.

(6) Society's image of engineers and technicians is far too fragmented into individual areas, each with its own activities, professional associations and social status. 'Engineer' is a term which covers a wide range from 'craftsmen', who are not held in high esteem, all the way to graduate engineers who attempt to compensate for feeling inferior to academics at respected universities by stressing the scientific nature of their work, thus running



the risk of becoming too far removed from practice.

(7) In a similar manner, the organization of enterprises is fragmented into sub-groups defined by profession, function and status. This hinders efforts to find a collective common ground for a course of action. Engineering, in particular, does not appear to be a potential link to transcend these group boundaries.

(8) The world of British culture and institutions does not have a separate place for engineering between 'arts' and 'science'. Engineering is one-sidedly viewed as being part of 'science'. In contrast, Northern and Continental European perspectives tend to allocate engineering just as highly regarded and more precise a place alongside the arts and science.

In addition, we sharply criticized universalistic and normative management theories. Our mentor in this field was Hartmann who had drawn attention to the cultural and societal relativity of management doctrines as early as 1959. Up until the end of the 1970s, however, German management practices were deemed antiquated, especially when compared with those in the United States. Hartmann was without a doubt the first to criticize these shortcomings emphatically. In 1973, the consultants Booz, Allen & Hamilton issued a report commissioned by a highly official source. This expertise found fault with the backward management and organizational policies of German enterprises. It pointed to a slight tendency towards the formation of 'divisions', the negligible separation between staff and line functions, too imprecise estimates of the economic viability of projects, personalized styles of management and similar shortcomings in the eyes of fashionable management theorists of the time. Hartmann objected to this view, stressing that such criticism could not be based on proven functional deficits. He maintained that cultural imperialism was at play (Lawrence 1992, p. 94f.).

We did not reflect on partial solutions to narrowly defined problems - such as efficiency, competitiveness, vocational training or management practice; instead we held comprehensive discussions in which we critically compared cultural aspects

and institutional practices. In the process, we continuously sought the interdependencies among educational systems, industrial relations, enterprise organization, social history, social stratification, views on engineering, and business economics.

### Passing on the message

The organizer of our barbershop and the larger think-tank, Michael Fores, now formed a network of personalities susceptible to the message. The contents of our work also made their way to the more operative departments of the Ministry where they were taken up, reappraised and made public in more prominent conferences. In 1976, a conference was organized under the direction of the permanent secretary of the Ministry (Peter Carey) which was attended by Michael Edwardes (Chairman of British Leyland at the time). The conference reports were published by the HMSO (Fores and Glover 1978). In addition, a working paper had been drawn up in the Ministry summarizing the main findings and indicating courses of action, and this was 'verified' at the conference.

Leading newspapers took up the message very willingly and enthusiastically. At the time, the general public was also very favourably disposed to criticism of conditions in Great Britain. One could not complain enough about the professions, generalist management, the neglect of engineering and deadlines and other things. As a foreigner, I was downright afraid of such debates. On the one hand, I wanted to avoid haranguing in the country in which I was a guest. On the other hand, this manner of criticism divulges uncertainty with regard to realistic courses of action more than anything else and runs the risk, in the emotional exhaustion following such a diatribe, of doing nothing more than consolidating existing conditions. On more than one occasion, it was suggested to me that, although it was perfectly understandable and endearing that I was an anglophile, I should nonetheless state my position clearly as was right and proper for a German.

Although our message included wide-ranging cultural and institutional criticism,

***"We did not reflect on partial solutions to narrowly defined problems - such as efficiency, competitiveness, vocational training or management practice; instead we (...) continuously sought the interdependencies among educational systems, industrial relations, enterprise organization, social history, social stratification, views on engineering, and business economics."***

***Via a network of individuals the message penetrated more operative areas of the Ministry***

***"At the time, the general public was also very favourably disposed to criticism of conditions in Great Britain. One could not complain enough about the professions, generalist management, the neglect of engineering and deadlines and other things."***



***The pressure to specify operational fields of activity included wide-ranging cultural and institutional criticism "(...) in the area of the structures of the educational system, in particular technical education, and the order of professional associations of engineers(...)"***

***"(...) social action in a differentiated sub-section of society is always linked through chains of interdependency with social action in all other sub-sections."***

***"Learning from international comparisons had a considerable impact to the extent that conditions in the Federal Republic of Germany were held up as a shining example for the British."***

***"For the 'purpose' of effecting lasting social change, following German models," we did "not have a replica of German conditions in mind."***

***The Ministry "(...) responded with relative eagerness to proposals to do something to improve the status and training of engineers."***

we were under pressure to specify operational fields of activity and to draw more explicit conclusions concerning segments of our work. These fields of activity fell to a very large extent into the area of the structures of the educational system, in particular technical education, and the order of the professional associations of engineers. This of course was contrary to our orientation towards 'social analysis'. Our interest in these issues was not overly developed for the reason that our barbershop was on the whole dominated by sociologists. Actually the man who most often played the role of the social analyst in the group was the experienced bridge builder, Michael Fores, who time and again drew our attention to the need for a parallel and coordinated development in differentiated segments of society.

Remarkably, he drew on practical experience to come to exactly the same conclusions which were also at the forefront of the 'societal effect' approach developed by Maurice et al. (1982): social action in a differentiated sub-section of society is always linked through chains of interdependency with social action in all other sub-sections. Through these chains of interdependency, action always remains specific with regard to a particular society, and indeed even through periods of social change. Accordingly, sweeping changes can only take place if a concerted effort is made which extends beyond sub-sections. At the time I was unaware of these links between Fores and Maurice. In retrospect, however, the connection between the two becomes all the more obvious and reveals a complementarity of a basic scientific orientation and application to practice.

Learning from international comparisons had a considerable impact to the extent that conditions in the Federal Republic of Germany were held up as a shining example for the British. I found this stylization alarming. But the fact remains that German vocational training, the amalgamation of engineering tasks and business management, the high regard given to engineering and engineers in Germany as well as the central role of skilled workers in German enterprises had aroused extraordinary attention. If anything, the interest of that period (1975-1977) has sig-

nificantly increased in the meantime. Although I was partly responsible for this development, it still leaves me feeling somewhat uneasy. With time, a trend developed towards an uninspired, propagandistic stylization of the 'German model' which totally ignored the social environment and other relevant aspects; and nowadays this is probably turning into equally uninspired criticism of the system.

For the 'purpose' of effecting lasting social change, following German models, Fores did not have a replica of German conditions in mind. He was thinking of a 'society for manufacturing' as a sort of social movement of differentiated functional elites. This society would be dedicated equally to the promotion of the status, attractiveness and coherence of engineering professions in the educational system, administration and trade and industry. The impetus for such a social movement extends far beyond the boundaries of a single ministry, however. In other words, as an apparatus, the Ministry had problems with such an objective. Nevertheless, it responded with relative eagerness to proposals to do something to improve the status and training of engineers. This was not an easy matter since it touched on the fields of action of quite different ministries and highly autonomous bodies. Especially in Great Britain, competences in the educational system are held in an unusual manner by professional associations, universities and local educational authorities.

Next a Commission was set up true to the British tradition of having a Royal Commission made up of independent members (high-ranking functional elite and dignitaries) work out important reform issues. This Commission was headed by Monty Finniston, the former long-time Chairman of British Steel. At this point in time I lost direct sight of their work because I finished my project at Oxford and returned to Germany. I remained in very close contact with the barbershop, however, especially through Michael Fores' stays at the Wissenschaftszentrum Berlin (where I then worked).

Precisely at this time (1978), just when our preparatory work was beginning to bear important fruit, a strange and paradoxical development occurred. While the



Finniston Commission was serving its function, the principal organizer and catalyst in the matter, Michael Fores, was becoming more and more demotivated in his work. One of the main reasons was the disrupted relationship with his new direct superior who kept asking for further instrumental steps of action, while Fores felt the most urgent task was to push forward a social movement as described above through persistent intellectual stimulus. The civil engineer was in other words unable to stick to a technocratic or instrumentalized perspective. He understood fully realistically that partial solutions which built on existing institutions were absurd. Reform would have to be ground by the very wheels which had been responsible for the established faults in the first place.

Michael Fores increasingly came to the pessimistic, although realistic conclusion, that it was impossible to make headway in the matter under the prevailing conditions. The difficulties appeared quite clearly to be political and social in nature. This does not mean, however, that the conflicts had mainly to do with the party politics of the time. After the Thatcher government came to power, there were drastic changes in economic policy measures with more incentives to increase profits. The promotion of technology and engineering and their importance for business managers seemed by comparison to be of secondary importance.

The barbershop had set its sights on issues which, one might say, did not fit on any political agenda. The Conservative government did not have it high on its priority list once the Labour government had likewise placed its priorities elsewhere. They had also stressed economic policies, although from a Keynesian and subsidization angle. In a nutshell, Fores and the barbershop most definitely had the right concept, but they were trying to implement it in the wrong society.

Given this situation, it is understandable that Michael Fores gave notice at the Ministry just when his principal concern was clearly starting to bear fruit. Since then he has dedicated himself to the autonomous and fallow activities of a private scholar (see e.g. Fores 1979) and com-

mentator. As an engineer with a keen sense of reality, he could not get around the following fact: it was not conceivable to pursue the larger matter at hand instrumentally and the prevailing social and political situation and his own personal circumstances appeared to render an instrumental approach nonsensical. He was, however, being forced to assume an instrumental disposition. Subjectively faced with the choice between the usefulness of his own work in the eyes of the hierarchy and truthfulness, he chose the path of honesty. This full-blooded engineer became a private scholar so as not to become a technocrat.

## Results of the reforms

One of the first results of the reforms was based on information from a study conducted by Lawrence (Hutton et al. 1977). These authors had shown that institute-trained engineers, as a category of experts who have had a great deal of daily technical experience in the field in addition to a sound education, are under-represented and do not enjoy sufficient recognition in Great Britain. This was impeding the important lines of communication between the shopfloor and the factory on the one hand, and development, planning and management on the other. The findings also showed that institute-trained engineers make outstanding heads of production, a job where open lines of communication are especially important. The authors also wrote that the status of institute-trained engineers was not far removed from that of their university-trained colleagues. They went on to say that this minimal difference helped to raise the weight and standing of production in an enterprise. In passing, it should be noted that the head of the project, Stan Hutton, was a professor of mechanical engineering who had had practical experience in Great Britain and Germany.

The impulse was taken up in the following manner: In 1976-77, courses were introduced in various institutes of higher education with the aim of turning out highly-qualified and respected heads of manufacturing. The courses were much more general in technical terms than their German models. They combined practi-

***Tension arose between the issue of “(...) instrumental steps of action” and the conviction that it is necessary to “(...) push forward a social movement (...) through persistent intellectual stimulus.”***

***There was realistic insight that “(...) partial solutions which built on existing institutions were absurd. Reform would have to be ground by the very wheels which had been responsible for the established faults in the first place.”***

***“In a nutshell” (...) we had “(...) the right concept, but they were trying to implement it in the wrong society.”***



***“The impulse was taken up in the following manner: In 1976-77, courses were introduced in various institutes of higher education with the aim of turning out highly-qualified and respected heads of manufacturing.”***

***“This was a reasonable step towards raising the status of manufacturing engineers” but “No drastic changes occurred.”***

cal training in enterprises with studies in sandwich courses. The universities which offered these courses of study were the more selective and elite institutions (Cambridge, UMIST, Imperial College, Brunel/Henley Management College, etc.).

This was a reasonable step towards raising the status of manufacturing engineers. It ended up, however, in the creation of an elite, new type of education for manufacturing managers. It failed to establish a category with any substantial influence in numbers to bridge the gap between academic engineers and workers and lower-level engineering staff. Unlike the German institute-trained engineer, this new type of qualification was not designed to the same extent to meet the needs of small and medium-sized enterprises. In addition, given the status of the institutions involved, the course was not suitable for skilled workers or engineers. Thus, the new institution did nothing more than follow in the wake of current courses. No drastic changes occurred.

The Finniston Commission produced very similar results. My interpretation is based on the account of Lee and Smith (1992: 193-195). An assessment of the Finniston Commission from the barbershop's perspective can be found in a publication by Glover and Kelly (1991). In accordance with the proposals made by the Commission, an Engineering Council was set up as an umbrella organization above the various splintered engineering associations. It replaced the former Council of Engineering Institutions (CEI) which had an extremely weak position and was not taken seriously. It should be noted that this was not a result of its symbolic provision or the top-quality personnel at its head.

Chairman of the Council of Engineering Institutions at the time was the Duke of Edinburgh who, as a naval officer and war veteran, had anything but a royally distant relationship to engineering. At Michael Fores' I was able to take a look at the correspondence between himself and Prince Philip. The Prince's comments were concise and well-informed. As a cultural hybrid with a sound knowledge of Germany, he was in a better position than most Britons to understand the com-

parison between Germany and Great Britain. However, neither his status as a member of the royal family nor the weak standing of the CEI allowed scope for behaviour that was anything other than ceremonial or cautious.

The appointment by royal decree was now to prove the undoing of the successor to the CEI, the Engineering Council. It was thus placed outside the normal legal and regulatory avenues. According to Lee and Smith, this ceremonial trait ensured that its competences remained limited. Nevertheless, the Council was able to push through a skeleton outline for classifying engineering degrees according to level. The graded categories of Chartered Engineer (C.Eng.), Incorporated Engineer (I.Eng.) and Engineering Technician (Eng.Tech.) seem to be reminiscent of the well-known German qualifications of Dipl.-Ing., Dipl.-Ing. (FH) and Technician. These certificates brought school/academic education and practical experience together and attested these combinations more succinctly than the previous lists of labels.

Furthermore, the Council made a real effort to advertise courses in engineering professions and to tap talent reserves - especially women - for the profession. Despite this, the percentage of new applicants for corresponding courses of study in establishments of higher education fell from 13% to 8% between 1982 and 1990. What's more, a great many of the students studying these subjects at British universities were (and are) foreigners. Lee and Smith (1992: 194) remark that technical education tended to become even less popular during this period. This could be attributed firstly, to a trend towards deindustrialization during this decade and secondly, to the fact that other courses of study were more successful and more credible in conveying the impression that they were better structured and would open up more lucrative and highly regarded career prospects. Furthermore, implementing specialized practice-oriented aspects into the curricula, in accordance with the German model, had a detrimental effect; courses - which were still very short (three to four years) compared to the length of such studies in Germany - became overloaded, which detracted from their popularity. As a con-



sequence, thought is once again being given to making technical university education more generalistic and to leaving application-related specialization to post-graduate courses and professional practitioners.

Thus, the complex of problems was tackled with quite remarkable measures. This did not really solve the fundamental problem, however, but reproduced it more or less innovatively at a higher level. Hardly anything dramatic has changed the underrating of engineers with regard to social prestige, payment, career opportunities, the scholastic calibre of newcomers to the field and the weight they carry in enterprises. Top enterprises in Great Britain, especially in the area around Cambridge and the Thames valley northwest of London, have made definite progress, however. In contrast, traditional industry has disappeared in frightening proportions. This reflects the inner conflict of engineering and industrial structures in Great Britain when it comes to traditional industry on the one hand and high-tech on the other. This difference runs parallel to regional divisions, the gap between the north and the south and the stratification structure.

Now at the time when our findings were becoming well-known outside the barbershop, S.J. Prais of the National Institute of Economic and Social Research showed great interest and contacted us. He himself was in the process of launching a series of commissioned research projects dealing with the connection between vocational training and productivity. Here, too, it was becoming obvious that government offices were catching on to the idea as a result of their activities in the barbershop and its projects. Vocational training in the dual system now appeared, as had been the case previously at certain times in Britain, as a means of helping to solve economic problems.

Over the years Prais and his colleagues were able to prove in an exceptionally convincing manner with a whole series of comparative studies on vocational training and productivity in various pairs of business areas in Great Britain and Germany the extent to which detailed differences were apparent in the respective businesses in the two societies, how they

differed according to sector and occupations, and what the connections were. The studies by Prais et al. (1989) and by Steedman and Wagner (1987; 1989) can be mentioned here as examples. The commenced trains of research and argumentation were given a substantial boost, both from the economic and the work educational angle.

Once again wide debate was prompted in Great Britain through these projects. The results have now become visible, although they cannot be described or discussed in detail here (see, however, Bulletin No.1 1994). It is noticeable, nevertheless, that despite radical institutional changes, the trends that developed under the Thatcher governments were evident here as well: the corporative responsibility of the social partners in the Industrial Training Boards was reduced rather than made more effective. Although authority for training became more regionalized following the German model, a widespread implementation of sufficiently demanding and nationally recognised occupations has not been secured in my opinion. My forecast is that the new system will lead in practice to a certain formalization and consolidation of company skills, which in the course of the 1980s found their place between craft skills and pure semi-skills. The backbone of the system is made up of the individually operating enterprises, at least when it comes to qualifications below the level of technician.

In addition to the above, however, a good number of initiatives were developed to improve school-based, general educational foundations for vocational training through the creation of a national curriculum. Formerly there were scarcely any compulsory subjects in British schools and no specification of achievement goals for secondary school final qualifications. Now the individual achievement ethos typical of British society according to which life is what you make of it will certainly change. Accordingly, it can perhaps be expected that vocational training will emerge in the long run from its unfortunate role of either compensating for shortcomings in general education or failing because of them. This problem, too, was broached in the barbershop.

***"(...) implementing specialized practice-oriented aspects into the curricula, in accordance with the German model, had a detrimental effect (...)"***

***"Thus, the complex of problems was tackled with quite remarkable measures. This did not really solve the fundamental problem, however, but reproduced it more or less innovatively at a higher level."***

***A "(...) series of comparative studies on vocational training and productivity in various pairs of business areas in Great Britain and Germany" provided convincing proof of "the extent to which detailed differences were apparent in the respective businesses in the two societies, how they differed according to sector and occupations, and what the connections were."***

***As a result "(...) wide debate was prompted in Great Britain through these projects." The results have now become visible.***



***“Our general appraisal shows ambivalence. We are satisfied about the sustained institutional activity and continuous strands of research that have evolved, yet sobered by the dilution of the effects.”***

***“What Europeans have in common is an awareness and the knowledge that similar problems are similar only at first glance, and that for this reason they have to be solved differently in different places. (...) The common ground among Europeans does not exclude differences and diversity.”***

***“European learning is founded on comparison, and this comparison should have a scientific basis. Having said this, learning for practical purposes also means, however, that the institutions, ideologies, powers and interests connected with learning are employed to their best advantage.”***

## Overall assessment

Our general appraisal shows ambivalence. We are satisfied about the sustained institutional activity and continuous strands of research that have evolved, yet sobered by the dilution of the effects. The following specific development is important: vocational education and training in Great Britain has undergone very sustained change as a result of the comparison with other educational systems in Europe and with Germany in particular. This has meant a harmonization of educational paths and formal qualifications in the superficial sense only, however. The results of institutional learning in Great Britain that evolved over a long period of time were quite different from the model that developed in Germany. One can learn very effectively from the comparison without the institutional patterns of the two countries becoming more alike. In this respect we are referring here to a type of learning that is imperfect only at first glance. To my way of thinking, it is perfectly European in the sense that an international comparison results in different local and national outcomes. What Europeans have in common is an awareness and the knowledge that similar problems are similar only at first glance, and that for this reason they have to be solved differently in different places. Even though the problems are similar only some of the time and the institutional conditions vary, we are able to learn from other Europeans. The common ground among Europeans does not exclude differences and diversity.

This assessment requires us to take a look at the experience gained at the boundary between scientific research and public action. European learning is founded on comparison, and this comparison should have a scientific basis. Having said this, learning for practical purposes also means, however, that the institutions, ideologies, powers and interests connected with learning are employed to their best advantage. If we examine the boundary between science and practice in our barbershop, we notice that the type of work commissioned at this boundary is of minor importance. The relevance of our activities resulted from the considerable closeness and autonomy of the interaction in the barbershop and its sphere of

influence. In this interaction, no distinction could be made between the roles of science, basic research, applied research and practical planning.

What is also obvious, however, is that this distinction became more and more relevant with time. Perhaps nothing else is imaginable under circumstances of instrumentalized administrative action in view of the weight of value-rational and traditional institutional patterns and considering established factions and political currents. This in turn shows that practical action is decidedly moulded by value attitudes, tradition and established interests. These influences are not neutralized by adding a scientific basis or by research, in the long run they are simply reinforced.

The obvious results of the efforts which found their expression in the barbershop were not based - as we have seen - on the division between applied research and basic research. In keeping with other experience, the type of application-oriented research following an enlightenment model had far-reaching repercussions; it can do that because it is also oriented towards basic research. It is based on open dialogue, and it is not rigidly restricted in its objectives and methods which can be constantly adapted. Regardless of how basic the orientation is from a scientific viewpoint, it follows a pragmatic model of policy consultancy, however. Bulmer (1978) presents a detailed account of such observations. Pragmatic consultancy presupposes open dialogue between social actors and researchers. We certainly had an abundance of that in the barbershop, and British social conventions among the differentiated elite in informal circles of friends seemed to me to have an exceedingly positive effect on this particular consultancy model. As a German in Great Britain, this was one of the lessons I learned.

The relations in our barbershop and environs could be appropriately characterized by reverting to the image of “reflexive modernization” (Beck 1986). This modernization in which we were involved did indeed contain a generous portion of reflexive, scientific appraisal of our own possibilities and conditions. With further development, social practice became de-





tached from the reference points created by scientific study, and it followed traditional paths - which applied to innovativeness as well. In the final analysis, it could not have been any different. As mentioned above, adherence to a reflexive modernization would have required a type of social movement beyond differentiated segments.

Great Britain would have to have the worst possible conditions for this. Everything we know about corporatistic concerted action in Great Britain verifies the weakening of any corporatism whatsoever in this society compared with a highly stable and growing corporate individualism, and this has been the case for a long time. Perhaps the Thatcher governments were right in a far more fundamental way that we thought at the time. They simply put all their money on strengthening all those things in British society that were well-ingrained and thus more easily attainable.

We had already developed this semi-resigned perspective on things back in the barbershop days. Reflecting on engineering work and every other type of work had obviously preserved us from exaggerated opinions in the sense of highly scientific approaches (Fores and Sorge 1978). It was also the source of our long standing criticism of schools of thought that saw the scientific basis as the hallmark of professionalized occupational work. This ideology seemed to us to be one of the factors responsible for the fragmentation and depreciation of engineering work. When a scientific approach replaces empirical knowledge, then occupational practice would appear to be some sort of slave to science (Child et al. 1983).

We countered this position with the view that new scientifically-based knowledge

also paves the way for new empirical knowledge. Practice always transcends scientific and other formally recorded knowledge (Sorge 1985). Application of knowledge amounts to transcendence of knowledge. More and more work-sociological research emphasizes such transcendent achievements. In a society where the scientific approach enjoys high public regard, those who transcend the current state of science are appreciated, powerful and effective. This is the case in research as in every other conceivable field.

Such dialectics on highly scientific approaches on the one hand and on 'practification', 'traditionalization' and 'cultural autonomization' on the other seemed to us even at that time to be integral parts of occidental development, and in fact essentially uninterrupted through epochal changes. We had developed and proclaimed a good deal of scepticism on this trend - from the Middle Ages to the modern, and now allegedly from the simple to the reflexive modern. To my way of thinking, it has been outstandingly confirmed by all other trends observed since then - real trends and trends in social dialogue.

Our overall appraisal can thus be summarized. Given the closeness of our interaction in the barbershop and beyond it, we were working under excellent conditions. As academics for the main part, prevailing traditions, institutions and powers caught up with us. Our work certainly had far-reaching repercussions, but with regard to social practice, different consequences than those we were able to anticipate. This corresponds to the above-mentioned enlightenment model of consultancy. Enlightenment fosters emancipation, but what the emancipated do is unfortunately - or fortunately - beyond the control of the enlighteners.

***"The obvious results" of our efforts "were not based (...) on the division between applied research and basic research." This type of application-based research "(...) follows a pragmatic model of policy consultancy" which presupposes "(...) open dialogue between social actors and researchers."***

***"When a scientific approach replaces empirical knowledge, then occupational practice would appear to be some sort of slave to science"***

***"In a society where the scientific approach enjoys high public regard, those who transcend the current state of science are appreciated, powerful and effective. This is the case in research as in every other conceivable field."***

***"Enlightenment fosters emancipation, but what the emancipated do is unfortunately - or fortunately - beyond the control of the enlighteners."***

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## Europa - International

### Information material, studies and comparative research

#### Competitiveness, equity and skills. Special issue

Singh A., Campbell D., Capelli P., et al. Bureau International du Travail (BIT) in: *Revue internationale du travail*, vol. 133 (2), Geneva, BIT, 1994, pp. 179-333 ISSN 0378-5599 (fr) EN, FR

This special issue, which deals with the relationship between competitiveness, equity and skills, is the product of a workshop on new tendencies in training policies held at BIT in 1993. The authors have, explicitly or implicitly, adopted narrower definitions to deal with concrete and precise issues. A. Singh, concentrating on models of economic growth and productivity in industrialized and developing countries, stresses the importance of high-level qualifications for countries to develop their technical capacities and for the gap between North and South to be filled. D. Campbell, whose field of interest is the strategies of multinational companies, explains the influence of a country's pool of available skills on investment decisions by foreign companies, in other words on the redistribution of jobs on a global scale. P. Capelli and N. Rogovski survey the qualifications now expected from workers by the high-productivity systems which have grown out of new forms of work organization or of the application of cutting-edge technology. In view of the fact that technical education and vocational training are in general not equitably accessible for various social classes, sexes and ethnic groups, M. Carnoy proposes a method to evaluate the efficacy and equity of public spending for these purposes. And finally, F. Caillods sheds light on the various national systems of technical education and vocational training and the tendencies shared by all of them.

#### Training for change: new approach to instruction and learning in working life

Engeström Y. International Labour Office (ILO) Geneva, ILO, 1994, 149 pages ISBN 92-9016-104-3 EN

Training for Change is a guidebook for those in various organizations who plan education and teach adults or young people. It is written particularly with the needs of human resource development and personnel training in mind. The book presents a cognitive view of learning and teaching. It gives concrete guidelines and practical examples for the formulation of cognitive objectives of instruction, for the organization of learning contents, for the selection of instructional methods, and for the planning of curricula. It is useful for everyone interested in turning workplaces into learning organizations. Prime attention is paid to the content and quality of teaching and learning.

#### Creating economic opportunities. The role of labour standards in industrial restructuring

Sengenberger W., Campbell D. International Institute for Labour Studies Geneva, International Labour Office (ILO), 1994, 439 pages ISBN 92-9014-529-3 EN

Change is a permanent feature of market economies. What is new in today's world is the pace, breadth and depth of economic change and the industrial restructuring that this entails. The chapters in this volume provide analyses of industrial restructuring at firm, industry, regional, national and international levels. They include detailed case studies of experiences in Germany, Sweden, France, Italy, the United States, Canada and Australia. With the aim of highlighting the vital role of labour standards in creating economic opportunities, other chapters in the volume develop conceptual perspectives on labour standards, provide comparative

### Reading selection

*This section has been prepared by*  
**Maryse Peschel**  
*and the Documentation Service with the help of members of the national documentation network (cf. last page)*

*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. The Section, "From the Member States", lists a selection of important national publications.*





overviews of their impact, and trace the evolution of labour standard-setting at the level of the European Community and in the international economy.

**Paths towards the informational society: Employment structure in G-7 countries, 1920-90**

Castells M., Aoyama Y.  
Bureau International du Travail (BIT)  
in: Revue internationale du travail, vol. 133 (1), 1994, pp. 5-36  
ISSN 0378-5599 (fr)  
EN, FR

On the basis of an empirical study of employment and of the structure of professions in the G-7 countries (Canada, France, Germany, Italy, Japan, United Kingdom, United States), the authors investigate the hypothesis underlying the theory of post-industrial society, which assumes a general and uniform tendency for the tertiary sector to occupy a growing proportion of overall employment. In reality, experience tends to show that countries evolve towards a post-industrial society along paths that are clearly different and according to production models involving a high content of knowledge (service economies or info-industry) which reflect their cultural and institutional diversity. The authors therefore suggest exploiting the notion of "informationalism" as a more efficient instrument of comparison to explain structural change.

**OECD employment outlook**

Organisation for Economic Co-operation and Development (OECD)  
Paris, OECD, 1994, 197 pages  
ISBN 92-64-14166-9 (en)  
EN, FR

This 1994 edition forecasts that in the short term unemployment will continue to affect record numbers of workers, although some pick-up in employment will occur with the cyclical recovery. In the medium term, labour force growth should continue, particularly to the benefit of women and older workers; the demand for skilled workers will increase but lower skilled occupations should still be an important part of overall job growth. The high level of job turnover and the role of

new and small firms in employment creation are discussed, as is the state of collective bargaining in relation to trade union density rates.

**Education 1960 - 1990. The OECD perspective**

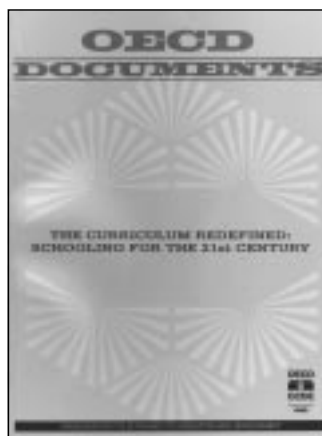
Papadopoulos, G.S.  
Organisation for Economic Co-operation and Development (OECD)  
Paris, OECD, 1994, 203 pages  
ISBN 92-64-14190-1 (en)  
EN, FR

OECD countries face significant educational challenges for the 21st century. This book provides an historical overview of the development of education in these countries from the late 1950s to the early 1990s, essential for understanding these challenges. The author situates the evolution of education and training in the context of broader social and economic policies. He thus provides a broad overview of developments in education in the OECD countries, and gives detailed references to the significant contribution made by the OECD in this area.

**The curriculum redefined: schooling for the 21st century**

Organisation for Economic Co-operation and Development (OECD)  
Paris, OECD, 1994, 230 pages  
ISBN 92-64-14183-9 (en)  
EN, FR

This report presents a comprehensive review of curriculum reform during the last decade. It is based not only on conference deliberations but on a large body of the work of the CERI (Centre for Educational Research and Innovation). Debates on curriculum reform are never-ending, but it appears that matters of curriculum - the syllabus, programmes taught and the methodologies and pedagogies used, and assessment - are again at the centre of democratic discussion in many Member countries. The problem lies not only in educating the brightest and the best, who can survive any curriculum, but also appealing to the rest, especially the less able 20 per cent who find little relevance in the subject matter and methods of work in the school environment. It is perhaps this group which needs more innovative





ideas and methods within the curriculum to increase the chances for a significant and rewarding working life and reduce the risk of long spells of unemployment.

### **Women and Structural Change. New Perspectives**

Organisation for Economic Co-operation and Development (OECD)  
Paris, OECD, 1994, 200 pages  
ISBN 92-64-14111-1  
EN

This publication presents the report of a group of experts to the Secretary-General of the OECD Member States examining the relationship between structural adjustment and the integration of women into OECD economies in the 1990s. It identifies directions for action related to work and family compatibility, occupational segregation and employment flexibility. A technical report analyzes the impact of structural change on women's employment, in particular the growth in part-time work, and trends in the service and public sectors, and considers the efficacy of existing equal employment opportunity policies in a constantly changing environment.

### **School: A Matter of Choice**

Centre for Educational Research and Innovation (CERI)  
Organisation for Economic Co-operation and Development (OECD)  
Paris, OECD, 1994, 161 pages  
ISBN 92-64-14087-5  
EN

Recent experience shows that policies to increase school choice bring dangers as well as opportunities. This report looks at how such policies have functioned in practice, in particular in Australia, the Netherlands, New Zealand, Sweden, the United Kingdom and the United States. Competition can, potentially, enable successful schools to choose their pupils rather than the reverse. Choice might therefore be thought to work best where students do not vie for places at the same institution, and where different schools offer various educational philosophies or subject specializations. Public policy may therefore need to encourage diversity as well as choice in education.

### **Information dossiers on the structures of the education systems in the European Community 1993: The Netherlands**

van der Noordt N., van Dorp A.  
Zoetermeer, Ministry of Education and Science, Information Department, Bibliotheek en Internationale Betrekkingen EURYDICE, 1993, 125 pages  
EN, NL  
*Ministerie van Onderwijs en Wetenschappen, Nationale dienst van Eurydice, Postbus 25000, NL-2700 LZ Zoetermeer*

This publication consists of a description of the education system, including administrative and political framework. Statistical and bibliographical information is included. New political developments are sketched briefly.

### **Les Etats de la Communauté européenne, différentes approches en matière d'aides publiques à la formation des salariés en entreprise**

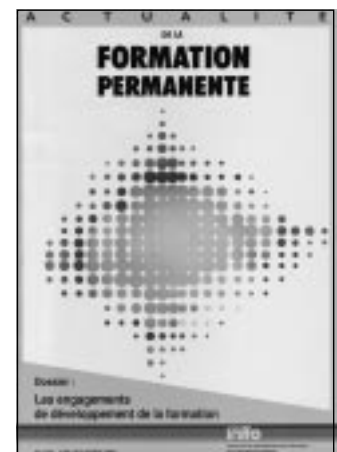
Pol A.  
in: Actualité de la formation permanente (125), Paris, 1993, pp. 118-121  
ISSN 0397-331-X  
FR

A guide for state activity in the field of vocational training, and for the manner in which discussion on training investment is followed up by change of political direction in the various Member States.

### **Apprenticeship, Alternance, Dual System: Dead Ends or Highways to the Future?**

Bertrand O., Durand Drohin M., Romani C.  
Centre d'Etudes et de Recherches sur les Qualifications (CEREQ); Organisation for Economic Co-operation and Development (OECD)  
in: Training and Employment, 16, Marseille, CEREQ, 1994, 4 pages  
EN  
*CEREQ, 10 place de la Joliette, F-13474 Marseille cedex 02*

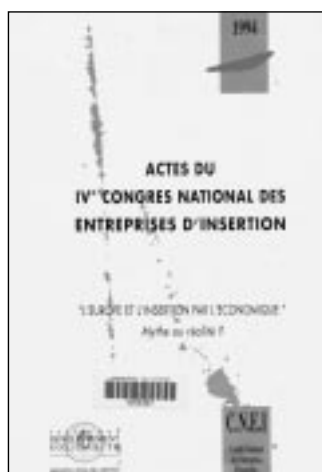
In the face of chronic youth unemployment, decision-makers in many countries are currently questioning the role and effectiveness of alternance between school-based vocational training and in-company





work experience. Whatever the historical and institutional context, fundamental questions are being raised in European countries and elsewhere. What are the effects of alternating training on youth labour-market entry and the improvement of the training-employment relationship? What are the economic, organizational and pedagogical requirements for success in alternating training? What is the role of the social actors in the definition and implementation of alternating training programmes? Such issues were discussed by decision-makers and experts from twenty-three member countries of the OECD on the occasion of a seminar organized jointly by the OECD and CEREQ in Marseille on 12-14 April 1994. The conference papers are available on limited distribution from the OECD, Paris.

Now that the great single European market is becoming reality, it is possible to measure the progress accomplished since the days of the Treaty of Rome, which constituted the first step towards free movement of workers within the Community. Community institutions have always tended to broaden application of this principle, extending it to job seekers, retirees and persons undergoing vocational training. The creation of a single European economic area will expand the geographic range of workers' mobility. In spite of this expanded right of movement, intra-community migratory flows have remained slight, a consequence of the employment market situation. Finally, the social dimension of a single market, though it may be laid down in the agreements, is difficult to implement in the face of the current deregulation trend.



**L'Europe et l'insertion par l'économie. Mythe ou réalité? Actes du IVème Congrès national des Entreprises d'Insertion** (Lyon-Bron, November 1993)  
Comité National des Entreprises d'Insertion (CNEI)  
Paris, CNEI, 1994, 150 pages  
ISBN 2-909932-22-2  
FR

In their struggle against exclusion, integration enterprises look into the factors which generate it. In November 1993, academic and corporate experts met at a colloquium in order to clarify the concepts involved and share their experience in this area. The proceedings of this colloquium present the transcript of the round table meeting on "Europe, exclusion and integration through economic factors", as well as the text of three workshops on practices of integration through economic factors in the other countries of the European Union, on integration enterprises in France and on the challenge presented by partnerships with the traditional economy. A summary of five workshops is also presented.

**LEARNTEC 93. European congress for educational technology and in-company training. Conference report**  
Beck U., Sommer W.  
Karlsruhe, Springer-Verlag, 1994, XII + 667 pages  
DE  
*Karlsruher Kongress und Ausstellungs GmbH, Postfach 1208, D-76002 Karlsruhe*

This volume is a collection of the main contributions to LearnTec 1993, which was held between 3 and 5 November 1993 in Karlsruhe. The papers offered concentrate on the use of modern information and education media in various areas of vocational training, particular attention being given to the competence in this area of a great variety of companies offering training. One part of the volume focuses on the situation in Canada, with 12 papers covering the topic in its various facets. Another part of the volume, "LearnTec Special", is dedicated to the topic "language learning with modern media".



**Le marché communautaire de l'emploi**  
Anne Meyer, Michel Mopin  
Paris, La Documentation Française, Problèmes politiques et sociaux, no. 698,  
1993, 69 pages  
ISSN 0015-9743  
FR

**Post basic physiotherapy education, continuing education, postgraduate education in the European Community, September 93**  
Standing Liaison Committee of Physiotherapists within the EC (SLCP)  
West Midlands, SLCP, 1994, 109 pages  
ISBN 972-96016-0-7 (en)  
EN, FR



*SLCP General Secretary J. Botteley,  
24 High Street, Henley in Arden,  
UK-West Midlands B95 5AN*

The report contains information about the development of continuing education and the opportunities for postgraduate studies in countries within the EC. The information is divided under four headings: contribution from 17 European physiotherapy associations; description of post basic physiotherapy education within the national education systems; overview of areas of professional interest including specific interest groups; guide to advanced professional and postgraduate education.

### **Orientation professionnelle en Allemagne et en France, utopie et réalité**

Eckert H.

Paris, L'Harmattan, 1994, 310 pages  
ISBN 2-7384-2053-2  
FR

This is a Franco-German comparison of the modalities of educational and vocational guidance. Divided in three parts, the book starts by presenting a review of the history of vocational guidance; it then describes the use of psycho-technology and current developments based primarily on vocational information.

### **L'évolution de la formation en apprentissage. Une comparaison anglo-saxonne**

Gospel H.C.

Centre d'Etudes et de Recherches sur les Qualifications (CEREQ)  
in: Formation emploi, no. 46, Paris, La Documentation Française, 1994, pp. 3-8  
ISSN 0759-6340  
FR

Great Britain, the United States and Australia all started off with the same apprenticeship system, which then developed in different directions over time. In most sectors of the economy, it declined rather early in the United States. In Great Britain, it has been deteriorating since the 1980s, and its continuation is also threatened in Australia. This article examines the reasons for this decline, which seems to be linked to institutional factors, and raises questions with regard to the consequences.

### **Réforme de la formation professionnelle des jeunes britanniques. Une première évaluation**

Steedman H., Hawkins J.

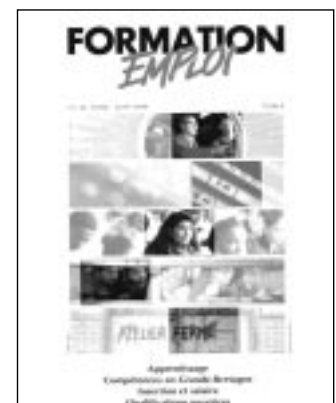
Centre d'Etudes et de Recherches sur les Qualifications (CEREQ)  
in: Formation Emploi, no. 46, Paris, La Documentation Française, 1994, pp. 9-21  
ISSN 0759-6340  
FR

This article is a field study analyzing the consequences of the introduction of *National Vocational Qualifications (NVQ)* in alternance training schemes for young people and levels of general training for the construction trades in Great Britain. The conclusion drawn is that the content of these competence-assessment instruments, their evaluation and financing modes do not provide for improved social justice, nor do they fill the qualification gap separating young Britons from other Europeans. The text is followed by a commentary by Vincent Merle and a report of the seminar organized by the "Formation Emploi" journal on the issue of *National Vocational Qualifications*.

### **Regional-level development initiatives in Germany**

Anglo-German Foundation  
Poole, 1994, unpagged  
EN

This report by the Anglo-German Foundation looks at how government responsibility for the development of small and medium enterprises (SMEs) can be decentralized and developed. Against the background of increasing devolution of regional and industrial policies from the centre to regional authorities and agencies, the reports look at how the UK, and Scotland in particular, can benefit from the regionalized system of economic development in Germany. Recognizing the diversity of the political, constitutional, economic and cultural characteristics of the two countries, the report does not recommend the wholesale transfer of the German experience to the UK. It does, however, say that the German experience is a powerful argument for regionalizing and localizing economic development responsibilities as much as possible, especially regarding the promotion of SMEs.





## European Union: policies, programmes, participants



### European Social Policy - A way forward for the Union. A white paper

European Commission  
COM (94) 333 final, 27 July 1994, 68 pages  
+ 348 pages (part B)  
Luxembourg, Office for Official Publications of the European Communities,  
ISBN 92-77-72195-2 (en), 92-77-72204-5 (part B) (en)  
ISSN 0254-1475 (en)  
DA, DE, EN, ES, FR, GR, IT, NL, PT

Based on the principle that Europe needs an innovative social policy built on broad foundations and turned to the future, this white paper sets a frame for action by the European Union in the face of new challenges. Its aim is the consolidation and development of past realizations, particularly in the area of the right to work, health and security, free movement and equality of treatment between men and women. It also aims at creating a new dynamic force by presenting new proposals in these areas. Part B of the white paper presents a summary of written contributions received by the Commission after the invitation it published in the "Green Book on European social policy: Options for the Union".

### Vocational training in the European Community: Challenges and future outlook. Follow-up to the Commission memorandum on vocational training in the European Community in the 1990s

European Commission: Task Force Human Resources, Education, Training and Youth  
Luxembourg, Office for Official Publications of the European Communities, Studies no. 3, 1994, 72 pages  
ISBN 92-826-7019-8 (en)  
DA, DE, EN, ES, FR, GR, IT, NL, PT  
*Task Force Human Resources, Education, Training and Youth, rue de la Loi 200, B-1049 Brussels*

The European Commission stimulated a very broad debate in the Member States following its memorandum on vocational training in the European Community in the 1990s, which was published in 1991.

This report summarizes the national contributions on this subject and points out the various areas of convergence and divergence. Among common tendencies, it notes the need felt for an improved anticipation of needs and changes in the area of qualifications, the call to enterprises to develop training plans going beyond their short-term needs, the emphasis placed on social partnership, the tendency to decentralization, the importance of stimulating personal motivation and of developing efficient guidance services. On the issue of the recognition of qualifications within the framework of greater European mobility, which all contributors find important, the majority of opinions expressed seemed to call for more transparency without necessarily insisting on formal recognition processes. Concrete proposals were made regarding the preparation, on a voluntary basis, of a vocational booklet that would describe a person's vocational qualifications and personal experience.

### Die Berufsausbildungspolitik der Gemeinschaft für die 90er Jahre

Lipsmeier A., Münk D.  
German Federal Ministry for Education and Science (BMBW)  
in: Schriftenreihe Studien zu Bildung und Wissenschaft (volume 114), Bad Honnef, Bock Verlag, 1994, XII + 255 pages  
ISBN 3-87066-725-7  
DE

This publication presents the reactions of the Member States to the Commission memorandum on "Vocational training in the European Community in the 1990s". Within the framework of the various areas of vocational policy focus, it compares and contrasts in synoptic form statements of the various contributors and covers particularly the German reaction to the memorandum. Reactions from the twelve Member States show a broad consensus regarding the basic principles of a modern and future-oriented vocational education in Europe and confirm the key role played by vocational training in the face of economic, technological, social and political change.







**Commission Directive 94/38/EC of 26 July 1994 amending Annexes C and D to Council Directive 92/51/EEC on a second general system for the recognition of professional education and training to supplement Directive 89/48/EEC**

European Commission  
Official Journal of the European Communities, L 217, Vol. 37, 23 August 1994, 10 pages  
Luxembourg, Office for Official Publications of the European Communities  
ISSN 0378-6978 (en)  
DA, DE, EN, ES, FR, GR, IT, NL, PT

**Vocational education and training in Central and Eastern Europe**

European Commission: Task Force Human Resources, Education, Training and Youth  
Luxembourg, Office for Official Publications of the European Communities, Studies no. 4, 1994, 55 pages  
ISBN 92-826-7196-8 (en)  
DA, DE, EN, ES, FR, GR, IT, NL, PT  
*Task Force Human Resources, Education, Training and Youth, rue de la Loi 200, B-1049 Brussels*

This report was requested in Autumn 1992 by the Commission's Task Force for Human Resources, Education, Training and Youth from a group of eight experts from different Member States. These analyses and any pointers they may produce are intended for the Commission and the Member States of the EU. They will help to guide the initial decisions of the European Training Foundation when it comes into existence. The report deals with initial and continuing vocational training in the former popular democracies and the Baltic countries; the countries emerging from the demise of the Soviet Union are not covered. It describes in turn the current situation of training in these countries and the help they have been receiving from outside. Thereafter it moves on to the problems raised in attempting to define a training strategy and putting in place an institutional and political system capable of following up and implementing it. Lastly, it offers guidelines for international cooperation and suggests on this basis what contributions the European Training Foundation could make.

**Europe and the global information society. Recommendations to the European Council**

European Commission,  
Brussels, Directorate-General XIII,  
1994, 36 pages  
DA, DE; EN, ES, FR, GR, IT, NL, PT  
*European Commission, DG XIII,  
200 rue de la Loi, B-1049 Brussels*

This report was requested by the European Council in order to be able to recommend specific measures to the Community and to the Member States in terms of infrastructure in the field of information. The report's authors suggest that the European Union should work towards freeing Europe of the current rigidity which places it in an unfavourable competitive position. Two of the proposals for experimental applications involve the development of tele-working and distance learning.

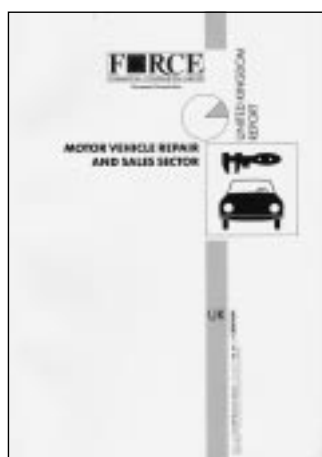
**Proposal for a Council decision concerning the continued development of the HANDYNET system within the framework of Decision 93/136/EEC establishing a third Community action programme to assist disabled people (HELIOS II 1993 to 1996) (presented by the Commission). Commission report for submission to the European Parliament, the Council and the Economic and Social Committee. Implementation of the HANDYNET computerized information and documentation system**

European Commission  
COM (94) 303 final, 12 July 1994, 94/0168 (CNS), 62 pages  
Luxembourg, Office for Official Publications of the European Communities,  
ISBN 92-77-71850-1 (en)  
ISSN 0254-1475 (en)  
DA, DE, EN, ES, FR, GR, IT, NL, PT

**European training for new and advanced technologies**

MacNeill S., Eva C.  
Birmingham, University of Birmingham/  
Welsh Development Agency, 1994, 12 pages  
*Research Support and Industrial Liaison,  
University of Birmingham, Edgbaston,  
UK-Birmingham B15 2TT*





This review examines advanced technological training and makes recommendations for future EC programmes. European training and technology transfer programmes such as COMETT, FORCE and SPRINT have broken new ground and have demonstrated the value of European training actions. The needs identified when the programmes were created are just as real today and therefore support for technology training on a European scale should continue. This review argues that future actions should be focussed towards a more strategic approach with integrated projects and appropriate levels of funding.

#### **ERASMUS programme. Report from the Commission. Annual report 1993**

European Commission  
COM (94) 281 final, 6 July 1994, 43 pages  
Luxembourg, Office for Official Publications of the European Communities,  
ISBN 92-77-71300-3 (en)  
ISSN 0254-1475 (en)  
DA, DE, EN, ES, FR, GR, IT, NL, PT

#### **FORCE programme:**

- **Comparison between continuing training systems in Italy, France, Spain, Greece and Portugal**

European Commission; CONFINDUSTRIA; Conseil National du Patronat Français (CNPFF)

Rome, Servizio Italiano Pubblicazioni Internazionali (SIPI), 1993, 337 pages  
EN, FR

*SIPI, Viale Pasteur 6, I-00144 Roma (currently being re-published)*

This collective work was carried out by the social partners in the five countries within the framework of the FORCE programme. The first part presents the general framework of vocational training in each country. The second proposes a comparison of the five systems according to the following topics: origin and organization of continuing training, expression of corporate needs and company training plan, initial vocational training, alternance training and apprenticeship, decentralization and management on a geographical basis, financing and control, validation and recognition of acquired skills, individual training leave, offer of training.

- **Training in the retail trade:**

- Belgium report**
- France report**
- Ireland report**
- Italy report**

European Commission, Force  
Prepared by CEDEFOP  
Luxembourg, Office for Official Publications of the European Communities, 1994

These reports, published in English by CEDEFOP are part of a series of national studies within the framework of the FORCE programme on training practices in the retail trading sector.

*The national reports can be obtained in their original languages by contacting the various FORCE national offices.*

- **Training in the retail sector. A survey for the FORCE programme. European report**

Kruse W., Bertrand O., Homs O. et al.  
published by CEDEFOP  
Luxembourg, Office for Official Publications of the European Communities, 1994, 91 pages  
ISBN 92-826-7887-3 (en)  
DA, DE, EN, ES, FR, GR, IT, NL, PT

This report was prepared on the basis of 55 case studies presented in the national reports so as to shed light on the various approaches and solutions found by enterprises in the face of training needs. Both the analysis of the sectoral context which constitutes the first part of the report and the case studies which make up the second part reveal that the low level of qualification of the employed workforce is considered by some companies as an obstacle to their efforts to improve their image, keep their customers and thus remain competitive. Companies of all sizes have, however, formulated innovative solutions to this problem.

- **Training in the motor vehicle repair and sales sector**

- Italy report**
- Luxembourg**
- United Kingdom report**

European Commission, FORCE  
Prepared by CEDEFOP  
Luxembourg, Office for Official Publications of the European Communities, 1994



These first reports, published by CEDEFOP, are part of a series of national studies within the framework of the FORCE programme on training practices in the motor vehicle repair and sales sector.

*The national reports can be obtained in their original languages by contacting the various FORCE national offices.*

**Employment and training in the automobile repair and distribution sector. Sectoral survey for the European Commission**

Denys J.

Hoger instituut voor de Arbeid (HIVA); Vlaamse Dienst voor Arbeidsbemiddeling en Beroepsopleiding (VDAB); FORCE-Agentschap Leuven, HIVA, 1993, 30 pages + annexes

NL, EN

*HIVA, E. Van Evenstraat 2 E,  
B-3000 Leuven*

**Autobranchen in Danmark. En sektoranalyse under EF's FORCE-program**

Copenhagen, Dansk Teknologisk Institut - Arbejdsliv, 1993

ISBN 87-90021-06-1

DA

*ACIU, Hesseløgade 16, DK-2100 Copenhagen OE*

**Training in the food and beverages sector**

**Tewerkstelling en permanente beroepsopleiding in de voedings- en dranksector. Sectoriële survey in opdracht van de Europese Commissie**

Desmedt M, Arryn P.

Researchinstituut voor Arbeid en Tewerkstelling (RIAT) vzw; Vlaamse Dienst voor Arbeidsbemiddeling en Beroepsopleiding (VDAB); FORCE-Agentschap Antwerpen, RIAT, 1993, 61 pages + annexes

NL

*RIAT, Ommeganckstraat 53,  
B-2018 Antwerpen*

This study on the food and beverages sector was prepared within the framework of the FORCE programme. It looks at employment and training and recruiting practices in this sector. The reader will also find a sectoral economic analysis.

**Lingua programme:**

• **Lingua compendium**

European Commission: Task Force Human Resources, Education, Training and Youth Luxembourg, Office for Official Publications of the European Communities, 1994, 303 pages

ISBN 92-826-7691-9

DE, EN, FR

*Bureau Lingua,  
10, rue du Commerce,  
B-1040 Brussels*

This compendium classifies the projects supported by LINGUA according to country and gives information about the profile of the applicant and the partners, according to the sector covered by the project and the target languages. The projects cover the five strands of the LINGUA programme. They are: measures to promote in-service training of foreign language teachers and trainers; measures to promote the learning of foreign languages in higher education institutions; measures to promote knowledge of foreign languages used in the work place; measures to promote the development of exchanges of young people in vocational and technical education; support for the activities of organizations and bodies at European level which underpin the aims of LINGUA.

• **Report of the Commission. LINGUA programme. Report of activities 1993**

European Commission

COM (94) 280 final, 6 July 1994, 48 pages Luxembourg, Office for Official Publications of the European Communities

ISBN 92-77-71291-0 (fr)

ISSN 0254-1491 (fr)

DA, DE, EN, ES, FR, GR, IT, NL, PT

**Social crisis management in the coal and steel industries**

European Commission, Directorate-General V

Luxembourg, Office for Official Publications of the European Communities, 1993, multiple pages

ISBN 92-826-5795-7

DE, EN, ES, FR

*European Commission, DG V,  
200, rue de la Loi,  
B-1049 Brussels*





**Evolution de l'emploi et des qualifications dans les secteurs des banques et des assurances, étude réalisée pour l'Observatoire Européen de l'Emploi**

Belloc B.

Direction de l'Animation de la Recherche des Etudes et des Statistiques (DARES)

Paris, DARES, 1993, 64 pages

FR

*DARES, 1 Place de Fontenoy,  
F-75700 Paris*

This study attempts to trace from several sources the recent and future evolution of employment and qualifications in the French banking and insurance sectors. It shows the role played by commercial professions, specialization and polyvalence. It highlights restructuring policies and technological developments leading to profound changes in management, employment and productivity.

**Europe Info - Verzeichnis wichtiger Informationsquellen in der Europäischen Union / Directory of important information sources in the European Union / Répertoire des principales sources d'information dans l'Union européenne**

European Commission: Directorate-General X, Information, Communication,

Culture, Audio-visual

Luxembourg, Office for Official Publications of the European Communities, 1994, 161 pages

ISBN 92-826-2196-0

multilingual version FR/EN/DE

**Manuel du travailleur frontalier, Le Nord-Pas-de-Calais, la Lorraine, l'Alsace, Rhône-Alpes, l'Aquitaine**

Agence nationale pour l'emploi (ANPE)  
ANPE, Noisy-le-Grand, 1993, 87 pages + 5 regional annexes

FR

*ANPE, 4 rue Galilée,  
F-93198 Noisy-le-Grand cedex*

This document presents the situation of border area workers: their motives, existing statistics and information on cooperation between border regions within the framework of FEDER. A second section analyzes the conditions of border work within the framework of free movement, and presents EURES, the new information network on employment. One chapter deals with vocational training and recognition of certificates. A third part presents the countries that host French border workers. The border regions are presented in the annexes.



## From the Member States

### **D** Perspektiven der dualen Berufsausbildung

Bundesinstitut für Berufsbildung (BIBB),  
Der Generalsekretär (editor)  
Bielefeld, W. Bertelsmann Verlag, 1994,  
111 pages  
ISBN 3-7693-05200-0  
DE

This book is a collection of eight papers, most of them delivered at the conference on "The future of dual vocational training" organized by the German Federal Employment Office in April 1994. Topical problems and public discussion regarding the German vocational training system tend to distort the view into the future. Dual vocational training will be able to retain its outstanding significance as long as it is flanked by on-the-job continuing training and by measures from other areas of the education and employment systems. The contributions of this volume are intended to stimulate debate about improvements to vocational training.

### **E** La realidad de la formación profesional continua en España

Alcaide M, González M.  
in: Revista andaluza de trabajo y bienestar social, no. 29, Seville, 1993, pp. 21-52  
ISSN 0213-0750  
ES

This article, divided into three parts, presents the true situation of continuing vocational training in Spain. The first part offers an overview of the offer of vocational training in Spain (regular vocational training, on-the-job training and continuing training), explaining the various definitions and concepts of vocational training, and looking at expenditure for training in Spanish enterprises on the basis of statistics - the cost of labour survey of the National Institute of Statistics and the annual study of collective bargaining in large enterprises prepared by the Ministry of Economy and Finance. The second part, by means of the "Survey of the Active Population", analyzes the importance of continuing vocational training in Spain, looking at the active population, em-

ployed and unemployed people attending courses in connection with some vocational activity, types of training in terms of training objectives (initial vocational preparation, continuing training or skills updating), types of training in terms of the type of centre administering it, training of workers and vocational situation, and problems facing enterprises wanting to participate in continuing vocational training. The third part presents the evolution of the Government's point of view in the face of the National Agreement on Continuing Training and the Tripartite Agreement in matters related to the continuing training of workers as well as the financing of training aids.

### **F** Savoir et pouvoir, les compétences en question

Aubret J., Gilbert P., Pigeure F.  
Paris, PUF, 1993, 222 pages  
ISBN 2-13-045928-5  
FR

This publication attempts to clarify the notions of evaluation and vocational skills. The second part compares evaluation of skills to a management problem which often faces industrial enterprises, namely the development of their senior technicians. The third part describes the various types of approach and methods used in the area of evaluation of skills.

### **Compétence, mythe, construction ou réalité?**

Minet F., Parlier M., de Witte S.  
Paris, L'Harmattan, 1994, 232 pages  
ISBN 2-7384-2683-2  
FR

The notion of competence has evolved, while the term itself has been suffering from overuse. The fourteen contributions in this publication situate and clarify this notion within the various fields of involvement of human resources. Four parts are developed: an analysis of the notion of competence, skills and work organization, skills and training structures, skills and vocational guidance.





### **Sociologie de la compétence professionnelle**

Trépos J.-Y.

Nancy, Presses universitaires de Nancy, 1992, 224 pages

ISBN 2-6480-444-1

FR

Who can judge a person's vocational competence? This is the fundamental question which this publication attempts to answer by showing under what conditions consensus can be achieved on what a "good pro" in a particular vocational field is. The author constructs an original interpretation model to deal with the problem of competence. He shows how society constantly makes an issue of the qualifications of its members, always facing the same questions: is a person competent because he has a certificate, or is it the other way round? Is competence identifiable when it is used, or must it be proved with arguments? He also insists on an often neglected point, which he calls "the imaginary aspect of competence": fed by happy or unhappy experiences, the public expectations perhaps tend to push "the pro" towards stereotypes.

### **Analyse des besoins de formation pour les personnels chargés de la réalisation de bilans de compétences.**

#### **Rapport final**

Gaona'ch D.

Centre Universitaire de Formation et d'Education Permanente (CUFEP),

Université de Poitiers

Poitiers, CUFEP, 1994, 112 pages

FR

*CUFEP, 15 rue Guillaume VII le Troubadour, B.P. 635, F-86022 Poitiers cedex*

Drawing up "bilans de compétences" (skills portfolios) has become increasingly widespread in France; the skills portfolio has by now found its place among the instruments of continuing vocational training. This increased use shows the importance of proper training for personnel in charge of making these evaluations. This report presents ideas and suggestions on this topic. The first part reviews the places where the "bilans de compétences" are drawn up. The second part analyzes the characteristics of personnel in charge of drawing up skills portfolios: connec-

tions to institutions, initial training, prior career. Having established four basic groups of skills required for the administration of "bilans de compétences", the author makes suggestions regarding the training of persons in charge of administering them, raising the question of the suitability of a specific training (at university level), insisting on the necessity and urgency of continuing training and on the implication of inter-institutional centres for the evaluation of skills (CIBC).

### **Recherches en éducation et formation, Répertoire 1986-1991**

Bourgeois M.-E., Champy P., Grégoire C., Sebbah E.

Centre national de la recherche scientifique (CNRS); Institut de l'information scientifique et technique (INIST)

Paris, Institut National de la Recherche Pédagogique (INRP), 1993, 352 pages

ISBN 2-7342-0367-7

FR

This French directory lists according to topics 1024 research projects on education and training.

### **IRL The future of nurse education and training in Ireland**

An Bord Altranais (The Nursing Board)

Dublin, An Bord Altranais, 1994, 82 pages

ISBN 1-872-00258-8

EN

This report recommends a radically different structure for nurse training than exists at present. It calls for the establishment of a national network of colleges of nursing and midwifery, with links to third level institutions, which would give nurses academic accreditation for their nursing qualifications. The report also recommends that (1) student nurses should no longer act as hospital employees, (2) training should have a greater emphasis on care in the community, (3) numbers entering should be limited according to health service needs and (4) there should be further development of post-registration education.



## NL Feiten & cijfers / Facts and figures 1993

Zoetermeer, Ministry of Education and Science, 1993, 445 pages  
ISBN 90-346-3007-2  
Bilingual version EN/NL

The facts and figures presented here concern higher education and research in the Netherlands. This publication serves primarily as background documentation to the Higher Education and Research Plan (HOOP), which the Minister of Education and Science is obliged by law to issue every two years, setting out government policy in this field. The format is as follows: 1) introduction to higher education, 2) the students, 3) education, 4) labour market, 5) research, 6) financial data, 7) the staff, 8) accommodation and equipment, 9) international comparisons. The annexes provide specific, detailed information and a number of tables, define the terms used and explain abbreviations.

## P Qualificação e mercado de trabalho

Kovács I. et al.  
Instituto do Emprego e Formação Profissional (IEFP)  
Lisbon, IEFP, Estudos 13, 1994, 206 pages  
ISBN 972-732-081-3  
PT

This study discusses the perspectives of the employment market and, in particular, the needs of employers in terms of manpower volume, professions, qualifications, training, type of employment and industrial location. The study covers three sectors: industry, banks and insurance, retail trade. It describes the main aspects of the employment market, evaluating the qualification needs and analyzing the responses to these needs by the education system and the vocational training system; lastly, it analyzes the needs of the workforce. Among the conclusions reached, the most important seem to be the preponderance of the service industry, the expected decrease in the volume of employment, particularly in agriculture, in the textile industry, in the shoe industry and in the civil service; the increased number of instable jobs and the needs for qualification, showing the greater importance of highly trained personnel, and the coexistence of tendencies towards

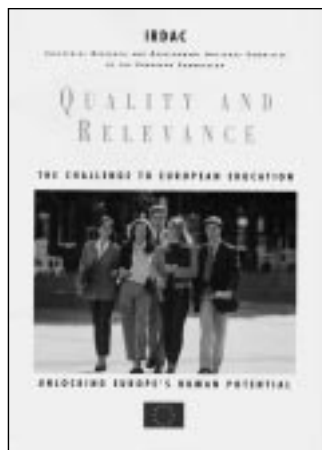
specialization and polyvalence; the maladjustments between conventional qualifications and the qualifications required for particular jobs resulting from the implementation of new forms of work organization; the ageing of the workforce; the fact that planning for workforce needs happens only in a few large companies; and that the diffusion of new qualifications will depend on adequate promotional policies and on the education/training system.

## UK Quality assessed

Confederation of British Industry (CBI)  
London, 1994, unpagged  
EN  
CBI Publications, Centre Point,  
103 New Oxford Street,  
UK-London WC1A 1DU

More resources should be devoted to maintaining the quality and credibility of the new vocational qualifications aimed at improving skills, this report argues. More than 68 recommendations for general reform of National Vocational Qualifications and the bodies responsible for administering them are given by the CBI. The CBI was one of the pioneers of the national system, which is based on measuring an individual's competence in day-to-day tasks. The review treads a careful line between endorsing NVQs and making radical proposals for change. Recommendations include: re-designing NVQs to increase their flexibility; expanding the policing role of the National Council for Vocational Qualifications and marketing NVQs more effectively.





**Quality and Relevance - Yardsticks for an Educational Policy in Europe**

IRDAC - Industrial Research and Development Advisory Committee of the European Communities  
Brussels 1994

This report is available from the following address:

*European Commission; Directorate-General Science, Research and Development; IRDAC Secretariat; Ms. Kathryn Ross; Rue de la Loi; B-1049 Brussels*

**Reviews**

## Quality and Relevance - Yardsticks for an Educational Policy in Europe

The competitiveness of European economies will be severely jeopardized if we do not manage to make better use of our enormous reserves of human resources. We need an educational policy that responds faster and more flexibly to challenges. This is the premise put forward in the most recent report of the Industrial Research and Development Advisory Committee of the European Communities (IRDAC). Entitled "Quality and Relevance", the name throws light on the programme it is promulgating with its recommendations on seven fields of action which could form the essence of a future educational policy.

1) The members of IRDAC see education first and foremost as valuable and an important end in itself, especially for young people. In order to meet the higher demand for comprehensively qualified personnel, educational processes must be organized in such a way that pupils and students acquire a broad range of basic qualifications. In the sense of developing overall competence, versatility should become a matter of course. Professionalism, but not specialization, should become the rule. The need for more competence, quality and relevance at all levels of the educational system certainly does not mean that young people should spend more time in education. Quite the contrary: it means that more efficient use should be made of the time spent in education and that the relation between initial training, studies and continuing education and training should be redefined.

2) The optimum road to personal development need not necessarily go via higher formal qualifications. Refreshing existing qualifications and developing one's skills and abilities might well be an alternative. If the individual and society are to be prepared for life-long learning, teaching programmes should be designed as the first module of a life-long learning concept, individualized learning should be supported by enterprises, and public funding should be redistributed between initial training and continuing education and training.

3) IRDAC believes that more cost awareness, cost effectiveness and productivity are needed in the education sector. For this reason, quality concepts such as those developed in trade and industry should be systematically introduced into all areas of education. It considers quality requirements to be essential especially when it comes to the relevance and standard of learning contents, and assessing internal organization and management, the suitability of teaching and training personnel, the effectiveness of teaching methods and the availability of institutions and services. Educational institutions should see learners more as "clients" and act accordingly. State authorities should likewise take steps to ensure that providers of education and training maintain quality standards, assess their efficiency systematically and apply effective teaching methods.

4) Enterprises must develop into learning organizations. This would require them to turn their back on static, functionally-orientated job profiles that present no challenge to their staff. Instead, they would need dynamic, open-ended job profiles that gradually supersede the division between work and learning. In an open corporate culture, enterprises will continue to offer their staff training and continuing training opportunities, they will motivate their staff to engage in continuing training and they will promote the development of their personnel.

5) IRDAC proposes that special promotion measures be taken to redress structural deficiencies in small and medium-sized enterprises and to stimulate innovation. This could entail for instance the introduction of quality assurance measures and continuing training for staff. IRDAC believes that cooperation between small and medium-sized enterprises and mediating institutions (such as the chambers and trade associations), large enterprises and educational and training institutions would be particularly beneficial.

6) In its report IRDAC emphasizes the close connection between research and





development, technological innovation, education and competitiveness. Thus, even schools should pay more attention to developing the scientific and technological competence of their pupils. For establishments of higher education the key words should be: a balance between research and learning; education through research; multi-disciplinary rather than specialized qualifications; and better transfer of R & D findings. No research project should be conducted unless the findings are to be directly incorporated into training and continuing training.

7) IRDAC considers that the main function of a European educational policy would be to promote cooperation and foster exchange. Better cooperation at institutional level and successive recognition of the compatibility of examination achievements should pave the way for a gradual convergence of formal qualifications that keeps pace with demand.

IRDAC believes that the coordination between EU structural policy and EU educational policy and between various European projects for research and development and education and training programmes needs to be improved in order to achieve greater synergy.

IRDAC is not addressing its recommendations solely to European-level education policy makers but to everyone in Europe who holds responsibility for education. More cooperation between industry and the education system will be needed to implement these proposals and recommendations, IRDAC believes. This cooperation should embrace all levels, from general schools to vocational training to higher education to continuing education and training, and it should be explicitly formulated as a goal.

**Dr. Reinhold Weiß**

Institut der deutschen Wirtschaft Köln

**Les instances de représentation des salariés dans l'établissement. Comparaison France-Allemagne. Rapport final (Tomes I et II)**

Dufour, C.; Hege A.

Institut de Recherches Economiques et Sociales (IRES)

Paris, IRES, 1994, 269 p. (I), 484 p. (II)

FR

IRES, 1, bd. du Mont d'Est, F-93192 Paris

**Les actions de qualification par alternance**

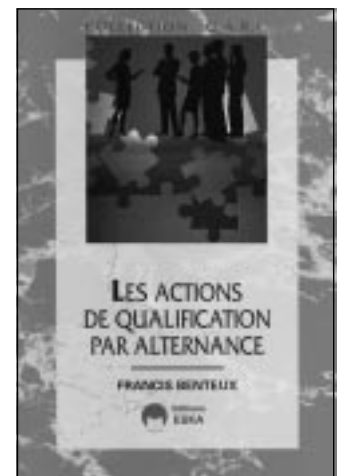
Benteux F.

Paris, Editions Eska, 1994, 159 p.

ISBN 2-86911-175-4

FR

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