

PANORAMA

Consultation process on the European Commission's Memorandum on lifelong learning

Analysis of national reports

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European Commission's
Memorandum on lifelong learning
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Preface

A year ago, the European Commission published a *Memorandum on Lifelong Learning* ⁽¹⁾ and invited the Member States of the European Union to launch, in the first half of 2001, a consultation process. This process was to be conducted as close to the citizen as possible and it was to involve the key actors responsible for implementing lifelong learning at local, regional and national levels. The aim of the consultation process was to collect together all views on how best to make progress in implementing lifelong learning, which is a priority horizontal theme within the European Employment Guidelines and which provides the overarching framework for the current generation of European education, training and youth programmes. The outcomes of the consultation process were fed into the preparation of the Communication from the European Commission *Making a European Area of Lifelong Learning a Reality* ⁽²⁾.

The Directorate-General for Education and Culture asked Cedefop to undertake a review of the Memorandum consultation reports received from the Member States and the EEA countries ⁽³⁾. This document presents the outcome of that review, which is intended as accompanying background information to the Communication itself. Brief information on the nature of the reports and the review method can be found in Annex I (at the end of this document).

The first section of this report provides a succinct overview of the main trends in the reports. This is followed by thematic analyses for each of the Memorandum's six Key Messages, preceded by a short introduction. These analyses do not include verbatim citations from the Member State/EEA country reports, since all these texts are accessible through the Internet ⁽⁴⁾. The report concludes with an epilogue on some issues that might have been addressed more fully, whether in the Memorandum or in the reports prepared in response, in the interests of contributing to further discussion.

The accession candidate countries were also invited to prepare reports as part of the Memorandum consultation process. The European Training Foundation has prepared a review of their contributions ⁽⁵⁾. In addition, the European Commission supported a wide-ranging consultation of civil society interest groups and associations. Their contributions are brought

⁽¹⁾ SEC(2000) 1832, 30 October 2000, Brussels.

⁽²⁾ *Making a European Area of Lifelong Learning a Reality*. Communication from the Commission, COM (2001) 678 final, 21.11.2001, Brussels.

⁽³⁾ Liechtenstein did not ultimately forward a report.

⁽⁴⁾ See: www.europa.eu.int/comm/education/life/report_en.html.

⁽⁵⁾ *Cross country report. The consultation on the Memorandum on Lifelong Learning in the candidate countries* / European Training Foundation. Turin, November, 2001.

together in a European conference report ⁽⁶⁾. These two reports therefore also provide background information to accompany the Communication of the Commission, and should be read alongside Cedefop's report to gain a full picture of the outcomes of the consultation process.

⁽⁶⁾ *Making Lifelong Learning a Reality: Consultation of civil society*, 10 September 2001, Brussels.

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1. Overview of the main trends in the Member State and EEA country reports

The *Memorandum on Lifelong Learning* sought to achieve consensus via a balanced approach across a range of key issues. Taking its cue from the European Council ⁽⁷⁾, the Memorandum argued that promoting active citizenship and promoting employability are equally important and interrelated aims for lifelong learning ⁽⁸⁾. It maintained that working together – including at the European level – to put lifelong learning into practice is the best way forward

- to build an inclusive society which offers equal opportunities to quality learning for all;
- to adjust the ways in which education and training is provided, so that people can participate throughout their lives;
- to achieve higher overall levels of education and qualification in order to match changing employment demands;
- and to encourage and equip people to participate more actively, especially in social and political life at all levels.

The Memorandum equally claimed that “lifelong learning is no longer just one aspect of education and training; it must become the guiding principle for provision and participation across the full continuum of learning contexts” ⁽⁹⁾.

There is **a good measure of consensus on the core issues** to be addressed in implementing lifelong learning, but predictably rather **less consensus on how to address these issues** successfully.

1.1. Employability and active citizenship

In response, **about half** of the Member State/EEA reports ⁽¹⁰⁾ seem to favour **an approach** to implementing lifelong learning (LLL) **that balances the aims of employability and active**

⁽⁷⁾ European Council Presidency Conclusions at the Lisbon Summit (23-24 March 2000, paragraphs 5, 24 and 25) and the Santa Maria de Feira Summit (19-20 June 2000, paragraph 33).

⁽⁸⁾ “Active citizenship focuses on whether and how people participate in all spheres of social and economic life, the chances and risks they face in trying to do so, and the extent to which they therefore feel that they belong to and have a fair say in the society in which they live. ... Employability – the capacity to secure and keep employment – is not only a core dimension of active citizenship, but it is equally a decisive condition for reaching full employment and for improving European competitiveness and prosperity in the ‘new economy’. Both employability and active citizenship are dependent upon having adequate and up-to-date knowledge and skills to take part in and make a contribution to economic and social life.” (*Memorandum on Lifelong Learning*, p. 5).

⁽⁹⁾ *Memorandum on Lifelong Learning*, p. 3.

⁽¹⁰⁾ Austria, Belgium’s Flemish Community, Denmark, Finland, France, Germany, Greece, Ireland and Portugal.

citizenship as equally important guiding principles for the successful implementation of LLL, in the interests of both economic competitiveness and social cohesion. **Most of the remaining reports** – without underestimating the importance of employability – tend to **emphasise** in particular the aims of **active citizenship, social cohesion and personal development** ⁽¹¹⁾.

1.2. An integrative or sectoral approach?

Just over half of the reports ⁽¹²⁾ tend to **favour a more explicitly integrative approach to implementing lifelong learning**, that is, a guiding principle across the full continuum of teaching and learning. The strongest statements in relation to improving the quality, extent and resource base for early childhood education are also found amongst this group of reports. The **remainder** are more **inclined to see** the implementation of lifelong learning as above all **a pressing issue for adult education and vocational education and training**, in particular continuing training ⁽¹³⁾. The reasons for these differences are obviously complex, relating to actual circumstances on the ground, national policy priorities and historical-cultural traditions.

1.3. The European dimension

By and large, **the majority** of the national reports **include a relatively weak European dimension** ⁽¹⁴⁾. This is partly because several countries took the consultation process as an opportunity to conduct a kind of national stocktaking exercise, that is, to describe current policies and measures that are seen to contribute to implementing lifelong learning. Some were very keen to demonstrate the quality and range of initiatives to which they are committed, and some reports do suggest that some countries judge their own policy and practice in this field to be ahead of current European-level discussion. But in addition, a clear majority expresses the view that the implementation of lifelong learning is very much a matter for national action. **European-level action should, on the whole, restrict itself to improving opportunities to exchange information and good practice**. Using existing EU resources and programmes more effectively to target more funding towards lifelong learning measures and projects, especially at regional and local levels of action, also receives broad support. But there is very little support for initiating a new specific strand of policy or action in favour of lifelong learning at European level. **Existing policies and programmes could**

⁽¹¹⁾ Belgium's French-speaking Community, Iceland, Italy, Luxembourg, Norway, Spain and Sweden. The reports from The Netherlands and the United Kingdom appear to place a stronger accent on employability issues, but this may be a reflection on the ways these countries understand the relationship between active citizenship and employability rather than attaching less significance to the former rather than the latter.

⁽¹²⁾ Denmark, Finland, Iceland, Ireland, Italy, Norway, Portugal, Sweden, Spain and the United Kingdom.

⁽¹³⁾ Austria, Belgium (both Communities), France, Germany, Greece, Luxembourg and (with a stronger focus on initial vocational training) The Netherlands.

⁽¹⁴⁾ Some reports, however, do express a relatively strong European dimension (for example, Italy, Luxembourg and Spain).

already do what is necessary, by readjusting their priorities and by adopting a mainstreaming approach to lifelong learning within the activities they promote.

1.4. Working together

Annex II summarises the main proposals for action in the Member State/EEA country reports. It is sometimes difficult to identify proposals as such, due to the highly general way in which ideas and suggestions are phrased. It is worth noting, however, that few address themselves to regional and local levels. This may reflect on the reach of the national consultation processes, in what is recognised from all sides as having been a tight schedule for completion. Some reports concentrate on national level action, others make more European-level proposals. These, too, are varied. As ever, some countries are keen to work together in a more integrated way, whereas as others prefer a more ‘intergovernmental’ approach.

However, **the majority** of Member State/EEA reports indicate that they **are in favour of improving the comparative information base** relevant to the implementation of lifelong learning. Several underline that the EU should actively cooperate with other international organisations (especially OECD) to avoid duplication, to pool expertise and to use available resources more effectively in what is bound to be an expensive endeavour. Nevertheless, **the concrete input on indicators and benchmarks is rather weak**. In contrast, there are quite **a number of concrete thematic proposals both for European-level research and European expert/advisory groups**, which could be seen as a first practical step to developing more appropriate indicators and benchmarks, which, as everyone agrees, is a very complex affair in the education and training domain ⁽¹⁵⁾.

1.5. Criticisms of the Memorandum

Naturally, the consultation responses include criticisms ⁽¹⁶⁾ of the approach and content of the Memorandum. Some would have liked to see more detailed conceptual discussion and definitional clarification; others would have liked to see more detailed description of policies and measures in the Member States. Most reports regretted that issues of particular social or policy importance in their national contexts had not been dealt with more fully, but the issues concerned are rather diverse.

⁽¹⁵⁾ At least some of this work will be carried through within the work programme prepared by the European Commission to follow up the Education Council’s *Report on the Concrete Objectives of Education and Training Systems*, Communication from the Commission, COM(2001) 501 final, Brussels.

⁽¹⁶⁾ Austria, Belgium (both Communities), France, Germany, Norway and Sweden made numerous critical points. Denmark, Finland, Greece, Iceland, Ireland, Italy, Luxembourg, The Netherlands, Portugal, Spain and the United Kingdom included fewer *explicit* criticisms.

However, **three substantive points of critique arise consistently** throughout the reports. The Memorandum gave

- **insufficient explicit emphasis to social cohesion and equal opportunities** (between the sexes, but also more broadly to a range of socially and educationally disadvantaged groups);
- **insufficient attention to the diverse LLL needs and demands of specific target groups;**
- **too much emphasis on individual responsibility** and too little on social responsibility for provision, access and participation, and outcomes of learning.

With reference to social cohesion, equal opportunities and target groups, the Memorandum had adopted a purely mainstreaming approach, but this is widely judged to have been unsatisfactory on a stand-alone basis. With reference to the balance of individual and social responsibility, many reports express concern that collective and public/state responsibilities towards citizens are in retreat, or are at risk of retreat. The reports therefore take particular care to underline that government and the public purse have either a significant or a leading role in implementing lifelong learning. Placing the individual at the centre of learning does not imply placing all responsibility for learning on the individual's shoulders.

1.6. Balance between the key messages

Overall, Key Message 1 (New basic skills for all) (hereafter, Key Message is abbreviated to KM), KM3 (Innovation in teaching and learning) and KM4 (Valuing learning) receive more detailed attention in the Member State/EEA reports than do KM5 (Rethinking guidance and counselling) and KM6 (Bringing learning closer to home). KM2 (More investment in human resources) receives diverse levels of specific attention, but resource-related issues also come up under all the other key messages. This review provides (further below) a synthesis of the points made in the national reports for each key message, but some of the main trends are summarised briefly here.

The theme of **basic skills attracts great attention** across the board. Firstly, many reports stress that **traditional basic skills should not be relatively downgraded** in importance, both since they are a pre-requisite for new basic skills (such as digital literacy) and in the light of the **continuing problem of functional illiteracy**. Secondly, many reports add to or amend the 'Lisbon list' of new basic skills, especially with respect to the **importance of learning to learn, critical thinking and social-communicative skills**.

The idea of creating **incentives to promote adult learning receives broad and strong support** from all quarters, both in terms of time and money as resources. Some reports, though, express strong **reservations about an individualised approach** to incentives. Interestingly, there are occasional references to raising the retirement age (in the light of the current demographic transition) combined with expanded rights and opportunities for achieving a better work-life balance over a longer period of the life-course. The reports

contain **frequent references to time as both an obstacle to and a facilitator** of participation in learning – and this raises largely unaddressed issues of organising working time and employment contracts in new kinds of ways. By and large, **all accept a division of roles and responsibilities** between government/state, industry/employers and individuals, although predictable divergences and uncertainties over the relative balance of responsibilities continue.

Probably due to the high profile of the eLearning initiative ⁽¹⁷⁾ many responses to the question of introducing **innovation in teaching and learning** tend to dwell on **how to harness the potential of ICT** for improving access and quality. Here, the tone of the reports is generally positive and sometimes enthusiastic. At the same time, repeated warnings are issued that ICT is but a tool, whereas **human-based pedagogies and face-to-face interaction remain the key** to successful and satisfying learning.

The reports universally applauded the Memorandum's position on the need to recognise the full spectrum of learning styles and contexts, and the systematic distinctions between formal, non-formal and informal learning that were introduced into the text. Responses coalesce around how best to assess and certify its outcomes, so that **valuing learning is also** a theme that **attracted much attention** overall. Many reports call for **renewed efforts to enhance transparency and mutual recognition** throughout the system, both within and across national boundaries. There is considerable **support for new ventures** in this area, together with the wish to link, extend or unify the various European mechanisms for 'portability' of qualifications and experience.

There is also considerable enthusiasm for giving a higher profile and lending **more concrete support to workplace learning**. Several suggest that it should be better integrated into the mainstream spectrum of education and training provision. In contrast, there is **little real substance with regard to non-formal and informal learning contexts and processes in the family, community, in youth organisations** and within the broader framework of organised civil society groupings. This may reflect lacunae in the reach of the national consultation processes. However, it is as well to recall that these sectors have not, in the past, generally achieved high social or policy visibility as valued learning contexts and as repositories of professional expertise. Some mention is made of the need to valorise and support parental contributions to learning, and there are occasional indications of regret that the Memorandum did not give greater space to youth and community education.

In addition, **the views of professional education and training practitioners** – of whatever sector – **do not visibly appear** in most reports, despite the fact that there is clear consensus on the need to update and extend their skills and competences to meet the new challenges. However, there is also an interesting trend in the reports towards openness **for new occupational profiles that cross over traditional professional and sectoral boundaries**

⁽¹⁷⁾ *ELearning – Designing Tomorrow's Education*, Communication from the Commission, COM(2000) 318 final, Brussels.

(for example: specialists in ICT and pedagogy, or professionals combining social work, pedagogic and guidance/counselling competences). This can be seen in the context of strong support for developing multi-specialist teams working together in multi-purpose centres, bringing learning into closer connection with the community and the local/regional economy.

Finally, **local multi-purpose learning centres receive universal support and many propose opening up the full range of local infrastructure** (building, equipment, support services and staff resources) to more intensive use by the community – occasionally including explicit mention of training centres and office facilities in private enterprises. There is a **strong emphasis** throughout all the reports **that networks and partnerships of all kinds should receive more encouragement and support at all levels**, both for synergy and for improving the quality of service to learners and potential learners. Here, the **Social Partners appear very prominently as key mediators** for networks and partnerships. But many reports are quite clear that the **full range of interest groups and actors, from all sectors of civil society**, must be actively involved in the implementation of lifelong learning if this is to succeed in bringing learning positively into everyone's daily life.

2. Thematic analyses by key message

2.1. Introduction

The ordering of the six key messages in the *Memorandum on Lifelong Learning* reflects three broad categories of action required for effective implementation of lifelong learning:

- *essential preconditions for lifelong learning*
KM1 – New basic skills for all; KM2 – More investment in human resources;
- *improving the quality and benefits of learning processes and outcomes*
KM3 – Innovation in teaching and learning; KM4 – Valuing learning;
- *providing learner-friendly contexts and support services for lifelong and lifewide learning*
KM5 – Rethinking guidance and counselling; KM6 – Bringing learning closer to home.

Nevertheless, the themes of the six messages are obviously interrelated and there are certainly other equally credible ways of dividing up the topics they discuss.

Many – though not all – of the Member State/EEA reports use the six key messages to structure their responses, but **the topics they discuss under each key message vary and overlap to some extent**. For example, the responses under KM1 (New basic skills for all) tend to address general principles in relation to lifelong learning and its implementation, as well as considering the nature of ‘old’ and ‘new’ basic skills and related access issues. By way of illustration, France (in company with all the reports) recognises the need to design targeted lifelong learning measures for the hard-to-reach. At the same time, the target group approach should not be taken so far that it overshadows the principle of ensuring universal and equal access to and participation in quality mainstream education and training throughout life. Ireland’s contribution, for its part, underlines that much more attention should be paid to assuring a solid foundation for lifelong learning through early childhood education. Furthermore, Ireland is now becoming a consciously multicultural society. The implementation of lifelong learning can and should play an active role in putting integration policies into practice.

This review presents the six key messages in the sequence in which they were presented in the Memorandum. However, Member State/EEA reports **do not necessarily give equal attention to each key message**. This reflects both differing circumstances and policy approaches at national level. For example, Iceland gives considerable attention to KM6 (Bringing learning closer to home). The realities of life for a small and scattered population living in an arduous climate and terrain have long since imposed specific conditions for provision of and participation in education and training at all levels. By way of comparison, The Netherlands pays particular attention to KM2 (More investment in human resources), offering a range of examples of current practice in relation to promoting work/life balance, workplace learning and partnerships/networks. Social traditions and policy priorities dovetail in the firm aim to

design and implement a comprehensive and coherent lifelong learning strategy, but within an explicitly pluralist model that rejects any form of ‘blueprint’ in favour of local and regional responsiveness and diversity.

The differing levels of detailed response to the key messages **do not necessarily imply** that Member States/EEA countries, individually or collectively, see **a particular key message as more or less important in principle** than other key messages. For example, all reports explicitly or implicitly recognise that more investment in human resources (KM2) underpins all lifelong learning policy implementation. All reports also expand the notion of investment well beyond its purely fiscal and monetary elements. Consequently, information on approaches towards and current examples of investment in human resources crops up throughout the responses to all the key messages. Some countries may well have chosen to give a less elaborate response to KM2 precisely because of its nature as a transversal prerequisite for effective policy implementation.

2.2. Key Message 1 – New basic skills for all

Memorandum Objective: Guarantee universal and continuing access to learning for gaining and renewing the skills needed for sustained participation in the knowledge society

This key message attracts much attention in the majority of Member State/EEA reports, which cover **a wide range of issues** that often reach beyond the immediate theme at hand. The issues raised under KM1 are also frequently closely linked with those addressed under other key messages.

The need for more investment in human resources (KM2) is illustrated by underlining that **access to** acquiring a given level of **basic skills** should be available **free of charge to everyone**, whenever and howsoever necessary. This is clearly a responsibility for the public purse – although only a few reports (most explicitly and firmly in the case of France, but also echoed by Belgium) call for a codified individual right to education and training on a continuing basis.

The need to develop **appropriate ways to win back disenchanted learners** relates directly to KM3 (Innovation in teaching and learning). In this context, many responses under KM1 point out that encouraging the **motivation to learn and the joy of learning** is essential. Some place the accent on empowering individuals to take responsibility for their own learning (for example, the Austria, Norway, and United Kingdom), whereas others emphasise the need for support from a range of private and public sources (for example, Denmark). Many reports (in particular, see Spain, Ireland, The Netherlands, Portugal and Finland) underline that **early childhood education is the foundation** for lifelong learning and would welcome a re-balancing of understandings of lifelong learning, which is often seen to be centred on adult education and continuing vocational training. Developing the capacity to learn continuously, and to regard this as a positive way of spending one’s time, can be either actively nurtured or,

too often, can wither away in the early years of life, which, as the Belgian and Swedish reports note, influence motivation for learning later in life. This compares with the stronger emphasis placed by other reports (for example, Germany and Austria) on the need to devote more resources to initial and continuing VET and adult education (points which also arise under other key messages).

Devising **new kinds of assessment and certification** to accompany more appropriate teaching and learning methods for both old and new publics is an example of why making progress on valuing learning of all kinds and in diverse ways (KM4) is a key implementation issue. A significant number of reports (for example, see Belgium, Greece, Spain, France, Ireland, Luxembourg, and Austria) also refer to the importance of **monitoring and anticipating newly emerging skills**. For this purpose, tracking systems/observatories have already been established or are in the pipeline.

The national reports place their responses in the context of two topics: firstly, definitions of ‘old’ and ‘new’ basic skills and their relative importance; and secondly, the connection between acquisition of basic skills and preventing social exclusion.

2.2.1. Basic skills

There is **no firm consensus on the definition of basic skills** – and little enthusiasm for a European-led initiative to resolve this question, as had been suggested in the Memorandum through the development of a shared European framework of basic skills. Indeed, responses to KM1 contained few real proposals for action at any level, although (throughout the reports) greater opportunities to exchange information and good practice, together with proposals for European research topics, find favour.

For some countries, basic skills essentially comprise traditional and digital literacy and numeracy, whereas others also include what might elsewhere be termed core or key skills covering a broader and perhaps more advanced range of knowledge and competences. Some reports (for example, The Netherlands and Finland) do not make strong distinctions between ‘old’ and ‘new’ basic skills. Many reports consider the ‘Lisbon list’ of new basic skills (IT skills, foreign languages, technological culture, entrepreneurship and social skills) too narrow and too heavily focussed on employability.

Most reports thus add to the ‘Lisbon list’ of new basic skills. Most frequently, the reports extend and specify a range of competences falling, on the one hand, into the **communication, intercultural and social domain** (for example, see France, Iceland and Spain) and, on the other hand, into a cluster of personal skills anchored in the **motivation and capacity to learn continuously, the competence for self-direction and critical analysis, and the ability to manage and use dynamic knowledge flows creatively** (for example, see the Danish, Italian, Dutch, Austrian, Finnish and British reports). The Irish report adds that sports, recreational activities and community arts are also important for nurturing richly contoured basic skills with an eye to the development of the whole person.

The German report, for example, points out that **employability** itself increasingly **requires the development of versatile people with strong personal and social skills**, which accounts for the directions in which the ‘Lisbon list’ has been extended in the responses as a whole. Alongside this, Austria, Ireland, Norway, and the United Kingdom give particular mention to fostering entrepreneurship – but definitions, appropriate learning contexts, methods and assessment mechanisms remain unspecified. Indeed, the Austrian report wonders whether entrepreneurial spirit can be intentionally taught at all. France raises the broader question of whether all skills can be taught and learned in the conventional manner.

Most reports (in particular, see Belgium, Germany, France, Austria, and Portugal) recognise the **great importance of multilingualism** in today’s Europe. The Icelandic report points specifically to its incontrovertible necessity for small nations using lesser-spoken languages. Several reports (for example, Austria, Greece, Iceland, Ireland, The Netherlands, Norway and the United Kingdom) also underline the importance of multiple language competence to foster intercultural understanding and to combat xenophobia. This includes learning languages spoken by indigenous or immigrant groups in one’s own country or those spoken in neighbouring countries. However, whether learning foreign languages can realistically be a priority for those individuals struggling to attain foundation literacy and numeracy in a country’s official language(s) remains, in the expressed views of some reports, a moot point.

Regardless of the importance of ‘new’ basic skills, many reports consider that the **‘old’ basic skills** (literacy and numeracy) **remain at least as important**, both in themselves and as the essential foundation upon which acquisition of these new skills is built. Some point out (for example, Ireland and the United Kingdom) that **functional illiteracy and innumeracy remain major problems** for which a range of revamped policy measures are being developed and implemented. At the conjunction between old and new basic skills, a number of reports perceive the **risk of a growing digital literacy divide** (although the Dutch report dissents, arguing that this is not a significant problem in The Netherlands). Several reports therefore propose that access to ICT hardware and software should be available to all citizens free of charge, and in some countries, plans to achieve universal access are already well underway (for example, in the United Kingdom).

Nevertheless, with the exception of France and Luxembourg, the reports contain **no concrete consideration of the implications** of changes in and expansion in the range of basic skills **for curriculum and pedagogy**, despite the fact that the Memorandum had specifically raised the question of how to deal with existing curriculum overload and the interdisciplinary restructuring of areas of knowledge. Luxembourg, for example, includes a specific proposal for linking areas of knowledge and skill to different levels of initial education and training. On the other hand, several reports propose that basic skills is a theme best dealt with within the framework of the follow-up to the Education Council’s report on the concrete objectives of education and training systems, in which the identification of a basic skills package and how best to ensure its availability and acquisition have been given priority status by the Education Council.

2.2.2. Social inclusion

Virtual consensus exists across the national reports that individual access to and acquisition of **a minimum threshold of basic skills** (even though that threshold or entitlement remains to be firmly defined) **is a powerful means to promote**, if not ensure, **social and economic integration** (for example, see Belgium, France and The Netherlands). Under its response to KM2 (More investment in human resources), however, the United Kingdom adds that lifelong learning is not always the best way to overcome social exclusion – rather, paid employment is the best way of all. All reports are insistent that education and training of all kinds and at all stages of life must be **tailor-made to meet the needs of the full range of learners**, and most particularly so for the socially and educationally disadvantaged. This implies precise identification of target groups and their specific needs, since disadvantaged individuals and groups are by no means homogeneous and their needs are highly diverse. Barriers to learning – whether at the level of motivation, opportunity, access or finance – require clearer analysis and practical counter-action. Education and training at all levels must be structured to facilitate and positively to **encourage continuous chances** for access and participation, so that people are not only able to recoup and re-launch learning and qualification pathways at any time in their lives, but also that it becomes a perfectly ordinary thing to do so.

Taken together, the reports produce a lengthy (and certainly not exhaustive) list of target groups for special attention. For example, immigrant, migrant and ethnic minority groups receive only rare mention in the national reports. This is also the case for those living in rural and isolated areas. Both categories are important for a large number of European regions. The **implications for mainstream education and training systems** of catering to a multiplying diversity of needs and demands **are rarely**, however, directly **addressed**. One obvious issue – raised, for example, by France – concerns the risk of stigmatising those groups targeted for special education and training measures. How is it possible to avoid this? If mainstream provision does not currently respond effectively to such a wide range of individuals and groups, then for what proportion of the population does it really work well, and how could that proportion be increased, in the interests of quality and efficiency as well as in the interests of equality and social justice? On the other hand, such issues are to some extent raised in the Member State/EEA responses to KM3, which focuses on innovation and change in teaching and learning methods, rather than in systems as such.

2.3. Key Message 2 – More investment in human resources

Memorandum Objective: Visibly raise levels of investment in human resources in order to place priority on Europe's most important asset – its people

Resource allocations underpin the scope for policy formulation and the implementation measures that follow. What kinds of resources are relevant, what levels of each are or should be made available, how are they to be distributed and used, and what is the return on and the impact of the investments made? The Member State/EEA reports devote varying amounts of

targeted attention to this key message, but **resource issues come up very frequently** in their responses to **other key messages**, too. Germany, France, Ireland, The Netherlands and the United Kingdom give perhaps the most detailed consideration to the need to raise investment in human resources and how this might be achieved in different ways. Austria and Finland offer detailed information on current levels and patterns of investment and participation across education and training sectors and levels. Sweden underlines the importance of the topic whilst acknowledging that **many questions remain unanswered in relation to how to define and measure the costs and benefits of learning**, including the distribution of costs and benefits within and across the different interest groups and stakeholders involved. This undoubtedly accounts for the **scarcity of really new ideas and innovative measures** in the reports as a whole. Interestingly, however, responses are in broad agreement that investment in human resources must be seen equally in terms of employability, active citizenship, social inclusion and personal development. Ireland states quite explicitly that all investment should be seen in human, cultural and social terms rather than simply in economic terms.

There is certainly a **large measure of consensus** amongst the Member States/EEA countries **on the directions in which to move**. Everyone agrees, firstly, that the successful implementation of lifelong learning requires **higher levels of spending** on education and training, although few reports specify how much more and from whence the extra money should come. Concrete commitment to augment the proportion of GDP spent on education is limited to Ireland, Italy, The Netherlands, Finland, and the United Kingdom, together with the Social Partners in Flemish Belgium. However, all emphasise that **using existing resources more effectively** (including Community resources available for lifelong learning) is an obvious means of raising returns on investment, which also **implies more monitoring, evaluation and quality assurance** measures. Once more, the majority view is that European level action in this area should restrict itself to the structured sharing of information and good practice. There is also explicit support (from Belgium, France, Ireland, Italy, Luxembourg, Austria, Sweden and the United Kingdom) to undertake further research (perhaps together with the OECD) **to throw light on unanswered questions** (as noted above). Greater allocation of funds to lifelong learning measures under existing Community programmes, in particular the ESF, would certainly be welcome – but with no further strings attached, that is, Member States wish to disburse such funds in the ways they judge best.

Secondly, everyone is in accord that **investment is not only about money**, but also about time, active facilitation and support measures – and ultimately, also about individual motivation to invest effort in learning. This means that **the benefits of learning require more explicit demonstration** to all concerned, and that there is **also broad support for incentive measures** of various kinds (including the longstanding issue of tax relief for company investment in human resources, mentioned for example by Luxembourg and The Netherlands). Thirdly, there is consensus that **investment is a shared responsibility** between the public purse, employers and individuals themselves. Few, however, clarify precisely who is responsible for what proportion of what kind of investment and for what purpose. Finally, the reports all take the view that **investment should be targeted on those most in need**, both

directly in the form of financial support for learning and indirectly in the form of providing tailor-made learning opportunities and support services.

2.3.1. Individual and social responsibilities

Views clearly diverge on two related issues: the role of government and the public sector, and the extent of individual responsibility. Some reports (in particular, see France, but also Belgium and Denmark) emphasise that education and training throughout life is above all a social responsibility. High levels of public funding are mandatory, with access and quality as matters for collective guarantees and public regulation. Denmark makes it clear that an over-individualised approach to implementing lifelong learning risks the temptation to cut public spending on education and training, and this should be firmly resisted both on principle and because, as Belgium adds, it would exacerbate existing social and educational inequalities. Others (in particular, see the United Kingdom, but also The Netherlands) place the accent more on reaching voluntary and negotiated agreements about levels of investment and the distribution of responsibilities between public and private sources, and they emphasise individual responsibilities more strongly. Yet others (for example, Germany and Ireland) stress above all the need to achieve a workable and realistic balance between public and private investment, between social and individual responsibilities. They also take a strong view that any extra resources must go, above all, to the socially disadvantaged, the educationally hard-to-reach and those in an unfavourable position in the labour market.

Nevertheless, there is consensus that the State holds the key role in providing for early childhood and pre-school education, initial education and (in most cases) training, and second or continuous-chance provision.

2.3.2. Social Partners and company responsibilities

The **Social Partners are** seen as **pivotal** for the effective implementation of lifelong learning. **Employers and enterprises should be called to account more strongly** than hitherto – both France and Sweden would have wished the Memorandum to be more forceful on exactly this point, for example. However, the Social Partners already play varied roles and evidence differing levels of commitment and activity in different countries, so that general conclusions on whether and how they should be doing more cannot be drawn. Many enterprises do offer quality environments for workplace learning and continuing training. Nevertheless, others do not, and there is **resistance from employers in some quarters to improving their performance** in this respect (as noted, for example, in the British, Greek, Norwegian and Spanish reports).

On this point, Greece proposes the development of **indicators to measure enterprise investment** in learning, whereas the Dutch report suggests that businesses be expected to develop their **‘corporate citizenship’ activities** by contributing to creating rich learning environments open to all comers. This might involve, for example, opening up their own

workplace resources to wider public use, funding mentoring schemes or donating equipment to local learning centres (which links up with the responses to KM6 – Bringing learning closer to home).

Many reports (for example, Luxembourg, Norway, Portugal and Sweden) propose that **company business plans should routinely include a training and skills development plan**, accompanied by annually updated personal development plans for each employee. Denmark and Italy support **national competence surveys backed up with research** to define agreed competence standards, possibly within the context of national observatories to monitor and forecast skills needs and supply (as also mentioned in the responses to KM1 – New basic skills for all). Both Spain and the United Kingdom, for example, also refer to the **importance of trades unions in establishing framework agreements** on training opportunities and in motivating both employers and employees to develop workplace learning.

Relatively low **investment in human resources** by small and medium-sized enterprises (SMEs) is a **major challenge**. Nevertheless, they do invest effort in the kind of workplace learning that may not be visibly recorded or recordable. There is a case, some reports argue, for public investment in SME-relevant learning provision. SMEs also need external expertise to assist them to meet demands for companies to draw up and implement business training plans and personal development plans for individual employees.

2.3.3. Barriers and incentives

The reports are very much aware that readiness to participate in learning does not automatically lead to participation. Not only financial, but equally other kinds of **barriers to learning must be dismantled** (see responses to KM6 – Bringing learning closer to home, further below). Existing **incentives** in terms of rewards through promotions and salaries **remain under-exploited**; the same applies to paid educational leave arrangements, despite some evident examples of good practice (for example, see Austria, Denmark, France, Iceland, Norway, Spain and Sweden). Company incentives of various kinds are also recorded in some reports (for example, Ireland, The Netherlands and the United Kingdom), and Greece calls for more action on this front.

Some countries (The Netherlands, Sweden and the United Kingdom) have introduced or are considering **demand-led individual funding incentives** such as Individual Learning Accounts (ILAs). Many other reports indicate interest in developing similar measures. For example, France sees their potential, but only within the framework of collective agreements and public guarantees in relation to funding, quality and portability. Iceland takes a similar line, suggesting that individual savings could be guaranteed by linking them with the pensions system. Denmark and Germany are also interested in individual accounts for amassing time for learning, rather than money to spend on learning. Some reports (for example, Ireland) would want to **ensure that such schemes do not reinforce existing inequalities** by disproportionately attracting those who already regularly participate in learning. The fundamental concern, however, is to **devise schemes that protect individuals from being**

prey to poor quality education and training providers, which is a waste of investment and risks *discouraging* people from learning.

2.3.4. Priorities and resource distribution

Some reports emphasise the claims of early childhood education to proportionately more funding. Others underline the need to place, absolutely and relatively, more resources at the disposal of adult learning of all kinds. Everyone wants *both* priority in resource allocation for the socially and educationally disadvantaged *and* priority action to raise overall levels of education and qualification for the whole population. **All these priorities are highly desirable, but it is unlikely that all are equally feasible in practice.** As the Irish report notes, resources are inevitably finite.

Added pressure on existing budgets arises from the very emergence of new areas of need and demand. Local learning centres and the implementation of eLearning receive widespread and keen support from all quarters, and both have significant resourcing implications. Promoting the quality and effectiveness of non-formal and informal learning demands more staff with trained pedagogical expertise and more flanking support (such as guidance and counselling, childcare services, accreditation and validation centres). Ensuring open and easy access to learning infrastructures (ICT equipment, study centres, tutor support) is at the forefront of concern in most reports, yet this, too, cannot pay for itself.

The reports give some indications on **current lifelong learning funding priorities**. Many **cluster around raising motivation for and widening access** to learning for the poorly educated and those at a disadvantage on the labour market (for example, Belgium, Denmark, France, Germany, Ireland, The Netherlands, Norway and the United Kingdom). Gender impact assessments and equality audits are also mentioned in this context. Others place the accent on **raising participation and achievement levels across the board**, from pre-school level (for example, Finland) through to adult learning of all kinds (for example, Austria, Greece, Iceland and Portugal). Sweden emphasises the need to provide a local infrastructure of support for lifelong learning, whereas Spain, Italy and Luxembourg seek **to promote a culture of continuing vocational training**, especially by sensitising employers and employees.

2.4. Key Message 3 – Innovation in teaching and learning

Memorandum Objective: Develop effective teaching and learning methods and contexts for the continuum of lifelong and lifewide learning

The Memorandum argued that the successful implementation of lifelong learning is dependent upon substantial change in individual, professional, institutional and social understandings of teaching and learning as intentional processes and as a set of goal-directed roles and relations. This implies placing **equal value on different kinds of learning contexts and pathways**,

and in particular **raising the profile of non-formal and informal learning** in comparison with formal learning. In turn, this has repercussions for **reviewing the quality and effectiveness of pedagogy and didactics** across the full range of learning contexts and publics, including **teachers' and trainers' roles and skills profiles**.

The impetus for innovation arises in a number of ways. Firstly, there is increasing **cross-fertilisation between sectors**, such as between schools and youth associations, or between work-based and community learning environments. Secondly, the need to improve quality entails greater **response to the diversity of learners' needs and demands**, such as unskilled older workers versus young lone parents, or urban refugee children versus senior citizens living in rural areas. Thirdly, **new skills profiles** (see the review of responses to KM1 – New basic skills, above) are also a source of innovation, since people acquire competences through the methods by which they learn as well as through the content that they learn. Finally – and at the forefront of the majority of the Member State/EEA responses to KM3 – the **potential of ICT and eLearning** currently sits at the driving edge of innovation in teaching and learning.

The Member States/EEA countries received this key message very favourably. The reports as a whole show keen interest in

- upgrading the status, quality and recognition of **workplace and community learning**;
- addressing the need to review the content and style of **initial and in-service training** for education and training practitioners;
- linking innovation in methods with innovation in valuing learning, especially for **non-formal and informal learning outcomes** (showing the close connection between KM3 and KM4);
- and, of course, developing high quality **ICT-based materials and methods** accessible to the full range of learners.

In addition, there is a consensus that learning contents must change alongside the introduction of new ways of learning. Although the reports do not go into much detail on this point, many call for a shift towards **practice-based, interdisciplinary areas of knowledge and skill**, ideally navigated by **active and self-directed learners** in a variety of contexts and with the support of **teachers/trainers as resource persons, guides and mentors**. The Danish report coins the leitmotif by arguing for a change “from the teaching of teachers to the learning of learners”.

The **high level of consensus on the core issues** demonstrated by the responses to KM3 suggests **considerable potential for further policy debate and innovative action at both national and European levels**. Overall, the reports firmly support greater exchange of information and good practice in this area, and make several proposals for applied research topics at European level. Examples include methods for teaching and learning new basic skills, developing competence-based learning cultures, understanding personal learning behaviours, methods of raising motivation to learn, evaluating innovative forms of training and evaluating the quality of in-company staff training and development. Several reports

explicitly welcome the idea of expert working groups at European level to pursue the themes raised through the Memorandum consultation process, especially for looking at the potential and impact of ICT on teaching and learning methods and processes. There is also specific encouragement for giving more emphasis to funding transnational projects working at the local/community level and in the non-formal sector of social and educational action.

2.4.1. Learning methods

Many reports refer to the need to balance out more theoretical styles of teaching and learning – which have long dominated formal education and training – with acquiring the competence to act knowledgeably, whether at work, in the community or in private life (in the terms of the Irish report, this equally corresponds to a **holistic learner-centred approach**). The Dutch report points out that people today require practice-oriented knowledge, and the Greek report adds that they need the **capacity to select, manage and restructure information, knowledge and meaning**, rather than simply collecting, memorising and reproducing these. In effect, as the Danish report summarises, today's Europeans must be able to take a critical position in relation to the complex worlds in which they live. The Swedish report emphasises that this learning must begin from early childhood education, including daycare, onwards.

Pedagogy and didactics must therefore adopt – as the Dutch reports puts it – an actively constructivist view of the learning process, wherever it takes place. In this view, **learning is an interactive, group-based activity** in which learners take charge of their own learning, with the support of professional resource persons who might be called (for example) teachers, tutors, coaches, facilitators and colleagues. This kind of learning is by no means new, but its relevance and value remains understated, since it classically takes place at work and in community life rather than in conventional classrooms. Some reports argue (for example, Austria and France) that this kind of learning cannot be fully accomplished in purely formal settings and in those courses leading to traditional paper qualifications. Rather, such learning **requires both a more fluid and dynamic environment and a continuous cycle of learning throughout life** to build and sustain the skills and competences concerned (many of which are those included in Member State/EEA lists of new basic skills under KM1, see above). Spain, for example, reports that its ultimate objective is to equip people to be capable of autonomous and continuous learning, within the framework of learning processes that can prompt not only the acquisition of new skills and competences but also the capacity for changing one's ideas and attitudes. Here, Denmark proposes that its open and flexible liberal education tradition could offer a model of good practice for Europe.

Learner-centred methods redefine the role of teacher and trainer in terms of **facilitating and moderating learning** rather than pre-specifying and regulating its path, direction and rhythm. **Particular attention** will need to be directed **to those who do educational work in non-formal and informal settings**. Policy and action in the Member States/EEA countries is clearly moving towards establishing recognised qualifications, providing training and improving career prospects for those outside the formal sector (for example, Belgium, Ireland,

Sweden and Portugal); seeking to expand the recruitment and qualifications spectrum for teachers in schools and colleges (for example, The Netherlands); considering how to improve the standing and salary levels for education and training professionals altogether (Belgium); and reviewing teacher training in the light of taking a lifelong learning perspective on education and training provision overall (Norway). The United Kingdom, for its part, plans to set standards and targets for improving the quality of teaching and learning across the board in further education, higher education and adult and community learning, including for teacher training in these sectors. The British report also supports the development of Europe-wide quality standards and accreditation based on minimum standards agreements for those working in non-formal sectors.

2.4.2. The potential of ICT

Many reports highlight the potential of **ICT** to make a range of learning materials available to meet individual needs (in particular, see France and the United Kingdom). However, they equally emphasise that harvesting this **potential is dependent upon** its anchoring within a **sound human and social framework** for learning (for example, Denmark, Germany and Sweden). In this context, France insists that the human-based pedagogic relation is irreplaceable, and the United Kingdom underlines that ICT should not be promoted to the exclusion of other tools for learning. Whilst ICT can favour the development of individualised pathways, it cannot hope to reduce the overall costs of teaching and learning provision through cutting down on the contribution of education and training practitioners. The Icelandic report provides an interesting accent on this issue, pointing out that ICT-based methods and materials have not yet been taken up as widely as might have been expected, because experience with and expertise in traditional distance learning is already well-embedded in Icelandic education and training systems and methods. Other reports (for example, Ireland and the United Kingdom) also make the point that **older communication technologies** (such as radio and television) **may be more effective on a broad front** because they already reach almost everyone and are very familiar aspects of everyday life. This means, in addition, that their use for education and training purposes is **less prone to exacerbate social inequalities** in access to learning.

Yet other national reports (for example, Spain, The Netherlands and Finland) strongly emphasise the innovative potential of ICT for teaching and learning and are investing considerable resources and effort into this field. The e-Luxembourg initiative, for its part, illustrates policy and action on a broad front in favour of integrating ICT into the education and training domain. It includes curriculum reform, teacher training and re-training, matching learning pathways to new occupational profiles in the Information Society, demystifying ICT and motivating potential learners to take up digital literacy courses with the help of local multi-purpose learning centres. The **production of quality ICT-based learning materials** preoccupies some of the reports, too – with **diverging views on how quality may best be assured**. Sweden clearly states, for example, that monitoring quality is a national (rather than European) responsibility. Finland, on the other hand, does not favour any regulation systems,

on the grounds that monitoring quality is a professional responsibility for individual education and training practitioners themselves. However, the United Kingdom is once more keen to develop Europe-wide quality-control standards for ICT-based methods and the personnel engaged in developing and using these, including a quality mark for ICT-based materials, capable of working in concert with European procedures for mutual recognition.

2.4.3. Organising learning

Forging new relationships between formal, non-formal and informal learning environments demands reconsidering how learning as a whole can be better organised. Virtually all national reports underline the **need for new alliances and partnerships** between universities, schools, community-based bodies and work organisations. The Italian report, for example, calls for re-evaluation of the role of formal education and training institutions altogether, suggesting that in the future, they should function as **catalysts and resource providers** for a diverse spectrum of non-formal learning environments. Norway's description of its recently launched 'Competence-building Programme' for promoting innovation in continuing education and training is an example of how national policy measures are endeavouring to seed multilateral partnerships and networks.

Broad consensus emerges on the need for formal education and training systems themselves to move to greater **flexibility, openness and demand-oriented structures** of opportunity for both entry and progression throughout life (for example, The Netherlands and Portugal). Both Denmark and Norway, for example, are currently seeking to improve the internal structuring of their initial education and vocational training with a view to enabling freer flow throughout their systems. Both Germany and Austria raise the issue of the **relative standing of initial and continuing VET and adult education** compared with initial and higher education. This is reflected not only in the distribution of funding and resources between the different sectors but also in arrangements for transfer and progression between general education and vocational education and training courses and qualifications. Closely linked with KM4 (Valuing learning), other ways to introduce greater flexibility focus on **self-monitoring of the learning process and its outcomes**, such as the introduction of personal learning plans and logbooks. For example, the United Kingdom is piloting a 'Progress File', which aims to record achievements, permit individuals to plan their learning and career pathways, and help them to recognise the knowledge and skills that they have acquired. Most national reports also identify the introduction of ICT-based and eLearning initiatives as a means to improve the flexibility of education and training provision and participation (such as the British National Grid for Learning, the Dutch Virtual Campus and the planned ICT, People and Society platform in Belgium).

2.5. Key Message 4 – Valuing learning

Memorandum Objective: Significantly improve the ways in which learning participation and outcomes are understood and appreciated, particularly non-formal and informal learning

Learning is ultimately a personal and social process that takes place in definable environments, follows traceable paths and methods, and leads to recognisable outcomes – although all of these interconnected elements can take highly diverse forms and purposes. Within this complex process, KM4 spotlights the theme of recognisable outcomes, that is, specifying and validating what has been learned in a credible and reliable manner. This takes place in different ways according to the purpose at hand and with a view to enabling people to take up further learning, pursue paid working lives and careers, and, not least, to garner self-worth and tangible acknowledgement of their capacities and achievements.

This key message also receives much attention in the Member State/EEA reports, whereby the responses as a whole show that **learning methods and outcomes must be seen in close relationship** with each other. This means that the issues addressed in the responses to KM3 (Innovation in teaching and learning) and KM4 frequently overlap with each other. In particular, responses to both key messages positively take up the Memorandum's support for a **differentiated perspective on the learning process** through distinguishing between formal, non-formal and informal learning and seeking to place these on a more equal footing with each other. This perspective **influenced the direction and tone of the national reports**, and it clearly dominates the responses on valuing learning, as indicated further below.

In contrast, the reports do not notably address the question of what kinds of assessment and recognition systems and procedures are fundamentally best suited to lifelong learning as an overarching framework for education and training as a whole and in a knowledge society. This means that very **few contributions undertake a review of the appropriateness and effectiveness of existing policies and systems for valuing learning**. Nor, interestingly enough, is there much discussion around the development of ICT-based or automated assessment and testing, although a number of pilot projects and initiatives in this area have been funded in recent years through the EU education and training action programmes.

2.5.1. Europe-wide approaches and practices

Whilst there was little comment in relation to existing European-level processes to establish mutual recognition and transparency of qualifications, most reports support European action to consolidate and make further progress in this area. Suggestions include extending existing working groups and creating new ones, increasing funding for relevant research and pilot projects, and some reports recommend the development of common European guidelines, standards or procedures. Most frequently, these suggestions refer explicitly to the assessment and recognition of non-formal and informal learning (for example, Denmark, The Netherlands, Austria, Finland), and in the case of the United Kingdom, the report specifies

that priority should be attached in the first instance to developing methods for assessing **learning in the workplace and in adult and community learning more generally**.

Other national reports (for example, Spain and Luxembourg) make more general points that apply across the full spectrum of learning, but may also specifically mention the need to develop overarching recognition systems that are capable of integrating the **complementarity of formal, non-formal and informal learning outcomes**. Italy, for example, is in favour of common European criteria for the certification of competences and the recognition of training credits, calling for a stronger coordination of national validation systems and judging European approaches to date as too fragmented. A number of reports (for example, France, Iceland, Sweden and the United Kingdom) propose a **more gradual, two-stage approach**, beginning with concerted efforts to improve national policies and procedures for valuing learning as a whole. Subsequently, common approaches and guidelines could be developed. In this context, The Netherlands proposes that a network of national centres of expertise for assessment and recognition of non-formal and informal learning should be established in the Member States, which would ultimately work together to produce Europe-wide standards and procedures in this area.

With reference to European-level action in any respect, but particularly as far as shared guidelines and standards are concerned, there is much more **support for progress through voluntary consensus** between the Member States rather than regulatory or prescriptive solutions – as one would expect in the education and training policy domain. The German report is perhaps the most explicit on this point, but still expresses support for greater coordination of policy and action in the field of transparency of qualifications. Many reports (for example, France, Luxembourg, The Netherlands, Finland and the United Kingdom) remark positively on the work of the **Transparency Forum**. They propose that it **should both continue and extend its work into the field of non-formal and informal learning outcomes**, and suggest that the Forum is a good model on which to base new groups on related issues.

2.5.2. Recognising non-formal and informal learning

The will to **ensure that people are genuinely rewarded for the learning they undertake and accomplish**, whether in the workplace or in social and community life, emerges very clearly indeed from the body of the responses to KM4. Denmark, for example, points out that this is by no means an easy task in technical terms, let alone in terms of establishing credibility and legitimacy. The **criteria and the process** of assessment and recognition must not only be **reliable and neutral**, they must also be seen and accepted to be so – but, as France argues, **a variety of interest groups** have to be taken into account here. Together with Sweden and Spain, the French report underlines that **the Social Partners must be seriously involved** in all aspects of developing and implementing new forms of recognition for non-formal and informal learning outcomes. Italy also illustrates this view in recommending that assessment and recognition **methods** developed in the context of **in-company or company-**

sponsored training should be drawn more systematically into the picture. In any event, quality is the keystone, as the Dutch report underlines in expressing the need for developing standards for non-formal and informal competences.

Some reports (for example, Germany, Spain, France and Austria) make specific suggestions for the kinds of **recognition instruments** that have been or might be developed. These are largely in the form of **portfolio-type products**, along the same kinds of lines as illustrated in the responses to KM3 (Innovation in teaching and learning) reviewed earlier. There, however, attention directs itself to ways of documenting and reflecting on the process of learning rather than on its outcomes (that is, for formative as opposed to summative evaluation purposes). The United Kingdom's response to KM4 also explicitly introduces a **more formative approach to valuing learning**. It points out that ways of giving feedback to learners on their progress (rather than simply certifying the learning that has taken place) should play a stronger role in assessment and recognition methods and instruments.

Several reports, however, also refer to the **spread of disaggregating ('unbundling') learning processes from learning outcomes**. Finland, for example, records increasing opportunities to acquire qualifications and diplomas without attending the formal education and training courses with which they are normally connected. This is one means of **freeing up existing accreditation systems** so that people who have acquired the necessary knowledge and skills in other ways can directly access a recognised certificate of achievement and competence. Along related lines, the German report points to the **significance of modularisation for innovative forms of assessment and recognition**. Such models allow the integration of a variety of kinds of learning and ways of assessing interim or partial outcomes, whilst ultimately aiming towards a unified qualification or diploma.

There are always a number of ways in which aspects of European education and training systems might be clustered, and none are ever wholly satisfactory. One way to group the national reports is to **consider the extent to which the formal education and training system is the primary point of reference** for developing new ways of valuing non-formal and informal learning outcomes. This is reflected in the reports from Belgium, Greece, Italy, Luxembourg, Norway, Portugal and Spain. Their responses indicate strong support for extending real credibility to learning across the full range, and recognise the legitimacy of outcomes validated in a variety of contexts – in particular with the participation of the Social Partners. On the other hand, the purpose of doing so is accented towards gaining access to courses and credits within existing assessment and qualification systems. Belgium and Luxembourg refer specifically to **gaining access to vocational training and higher education courses**. Spain is especially interested in credit accumulation systems that can include non-formal and informal components, whereas Italy places emphasis on formative assessment procedures that validate learning trajectories as such. Norway notes that access to higher education is already open in principle to those without formal entry qualifications. Interestingly, the Norwegian teachers' union takes the position that non-formal and informal learning should be seen as complementary to formal learning, but should not replace it.

Other national reports suggest that **credibility on the labour market is an equally important consideration**. France, Ireland, The Netherlands, Finland and the United Kingdom fall more readily into this group. These reports pay particular attention to **modulating the dominance of existing recognition systems** that originate in formal education and training sectors. They record ongoing engagement with moving towards competence-based qualifications, and they all refer to the **potential benefits of disaggregating** participation from certification. France is especially concerned to assure the **social legitimacy and labour market exchange value** of qualifications and diplomas, of whatever kind. These must therefore all be widely known and accessible, although the Dutch report adds that too many kinds of widely available certificates in Europe would inevitably lead to a counterproductive process of credential inflation. Overall, Ireland argues that moving towards widely accepted forms of recognition for non-formal and informal learning outcomes is the decisive step in making the transition to lifelong learning.

A third group, including Denmark, Iceland and Sweden, but also Germany and Austria, offer a less well-defined picture; and the Nordic countries in particular document **alternative approaches to understanding the essential purposes of valuing learning**. Austria, for example, lends positive support in principle to modularisation schemes, systems for the accreditation of prior learning and continuing education and training portfolios for adults, but takes a cautious line in practice by seeking to integrate new forms of recognition into existing formal accreditation systems. Sweden argues for a fully open structuring of education and training on both national and (ultimately) European levels so that access, progression and transfer can readily occur in all possible directions. However, **all assessment and recognition systems, by their very nature, privilege stability over change** in that they 'fix' current practice into evaluation criteria and procedures. One of the most valuable features of non-formal and informal learning is that it is not subject to this kind of inherent brake on change, and hence the development of **new forms of recognition could detract from the very qualities knowledge societies want to promote** in teaching and learning. In addition, there are concerns that attaching forms of assessment to non-formal and informal learning might discourage the very people most in need of positive learning experiences.

Finally, the Danish report explicitly acknowledges divergent interests between those oriented towards the labour market and vocational training, and those oriented towards the liberal education tradition. The former interest group wants to make non-formal and informal learning visible and productive for enterprises and for individuals as jobseekers and employees. The latter, however, view learning as an end in itself rather than having instrumental aims. Furthermore, many learning outcomes are not measurable at all, making assessment and certification inappropriate in principle. Placing practical and philosophical **limits on the potential for developing new ways of valuing learning** is perhaps not a question for immediate policy attention, given the evident scope for exploiting that potential in positive ways. Nevertheless, it is as well to be aware that such quandaries will need to be addressed in the future.

2.6. Key Message 5 – Rethinking guidance and counselling

Memorandum Objective: Ensure that everyone can easily access good quality information and advice about learning opportunities throughout Europe and throughout their lives

The Member State/EEA reports do not, on the whole, deliver extensive and detailed responses for this key message. At the same time, it receives a **unanimously positive echo** and, interestingly, there is **widespread support for a number of European-level actions** going beyond greater exchange of information and good practice. The reports emphatically agree that appropriate and effective guidance and counselling services are an essential building block for the successful implementation of lifelong learning.

Today's **services require re-orientation and improvement** in order to meet this challenge, including an explicit European dimension. Some reports (for example, Finland, Iceland, Spain and the United Kingdom) specifically welcome the development of **Europe-wide quality guidelines and standards**. Others (such as Denmark and Ireland) see European-level initiatives of various kinds as helpful in 'recharging' the field and developing coherent strategies at national level. Existing European guidance networks (EURES, Euroguidance, Eurodesk, ERYICA) receive positive support, with greater cooperation between them recommended.

The concerns and priorities in the Member State/EEA reports might be summarised under four headings. Firstly, services should become **continuously accessible throughout life** and be based on a **holistic model** (lifewide, whole-person-oriented). There is no question that guidance and counselling **services for adults must be expanded**, and that these cannot simply replicate the established services for young people at initial transition (see, for example, France, Ireland, The Netherlands, Norway). Services for those of all ages and circumstances must adopt **an individualised and tailor-made approach**. Secondly, **networked team-based models of provision**, operating locally but with coordinated links throughout the system, are the best way forward (such as the 'one-stop-shops' supported by Ireland and the United Kingdom). As Norway, for example, emphasises, networks and partnerships must also include **greater contact with employers and enterprises**. Thirdly, Member States/EEA countries acknowledge a need to **introduce quality standards** more systematically into guidance and counselling. This is an area in which European cooperation could render welcome assistance, as noted above. Finally, professional **training for guidance and counselling personnel** is highly diverse in nature, level and degree of recognition between European countries. There is broad agreement that this situation **requires sustained attention**, with some interest in developing a solid European component to revamped training courses and qualifications (for example, Belgium and Denmark).

2.6.1. Proactive and individualised services

The French report provides the leitmotif for the direction of future change in guidance and counselling practice, which is moving away from the logic of education, training and

occupational selection-allocation, and is **moving towards the logic of enabling the continuous construction of choices and decisions**. This new logic assumes that it is practically feasible to pursue individualised learning and working pathways, and that individuals have the capacity and opportunity to develop personal-professional life projects. Clearly, this is not yet the case for everyone, which certainly implies that guidance and counselling services must also develop a more proactive approach in both **reaching new publics** and encouraging people to take their lives more decisively into their own hands, as Portugal notes. The Dutch report refers to **an ‘activating’ approach** in this context, the Spanish report speaks of **enabling personal autonomy** as both worker and citizen, and the Italian report points to the **potential of self-counselling**. The Swedish report also takes the broader **context of internationalisation and mobility** into account. This is likely to multiply the range of learning and working trajectories and, hence, underlines the importance of designing individualised services as a matter of principle, and not only to respond more effectively to specific needs of target groups.

Several reports (for example, Spain, Italy and Portugal) emphasise the view that guidance and counselling **services must be decentralised**, offering easy access at local level and grouped within **multi-disciplinary specialist networks** managed by **multi-actor partnerships**. The United Kingdom makes a particular point of emphasising the **importance of involving users** to achieve quality and relevance of service, giving the example of the new *Connexions* initiative, specially designed for teenagers.

2.6.2. Positioning guidance and counselling services

As a profession and as an institutionalised service, **guidance and counselling is positioned in a variety of different ways across European countries**. Some countries have a strong tradition of educational and vocational counselling, primarily for those making initial transitions between schooling, training, further and higher education, and employment. Some also have well-structured employment-oriented information and advice services, directed at adults as well as young people. In some countries, all such services are part of the public administration. In others, a plethora of community-based and commercial services exist alongside public provision. These are frequently designed to address particular target groups, including the executive search market. Some service traditions see themselves as primarily serving users; others are more concerned to respond to labour market needs; yet others directly serve employers. In some countries, guidance and counselling is a regulated profession with specialist entry qualifications, in others far less so, and in some places much information and advice is delivered through civil society associations and voluntary workers.

This diversity is well known, but there are some recurring tensions that arise whenever discussion turns to considering prospective changes to existing systems and practices. One of these tensions relates to **differing understandings of where and how guidance counsellors should be positioned regarding specific education and training matters and those issues related more to employment and the labour market**. A proper balance needs to be

maintained between the interests of the different users and beneficiaries. Interestingly, this issue is raised explicitly in two reports, neither of which presupposes that there is a ‘correct’ answer. The Norwegian report asks, in an open manner, whether it is preferable to integrate guidance and counselling into formal education and training settings and to associate it with teaching and training as such, or whether it is preferable to separate these functions and tasks. The Danish report points out that there are divided views on this question. Educationalists are inclined to think that guidance and counselling should not be institutionally independent services. It is preferable to link them with education and training settings, because this optimises access and ensures that guidance counsellors are closely familiar with learning environments. Those closer to the business world and the workplace are more likely to favour the separation of guidance and counselling services from particular institutional settings, on the grounds that this promotes a more neutral approach to information and advice. It may also encourage healthy competition between different kinds of services.

Once more – as in the responses to KM2 (More investment in human resources) – **views diverge on the extent of state and public responsibility for provision.** Again, Belgium and France emphasise that guidance and counselling services are altogether a public responsibility. Free access to good-quality information and advice must be available for everyone, whatever their personal and professional circumstances, with France recording the established right to the well-known *bilan de compétence*. This comprises a structured, professionally guided self-analysis and diagnosis process to assist individuals to recognise their existing competences and future training needs within the context of developing and undertaking a personal-professional life project. The United Kingdom, on the other hand, concurs that guidance and counselling services should be universally available, but works on the basis of a mixed public and private model of service in which services are delivered through learning partnerships which may involve private sector participation.

2.6.3. Quality and reach of services

Widespread consensus exists (for example, Belgium, Germany, Spain, Austria, Sweden, and the United Kingdom) **on the need to update and improve initial and in-service training** for guidance and counselling practitioners. Iceland and The Netherlands point to the need to introduce and improve training for guidance and counselling tasks in courses for schoolteachers, vocational trainers and other educational workers, **including in the non-formal sector and in workplace settings.** Many responses (for example, Denmark, Ireland, Portugal and the United Kingdom) also underline that **specially designed, targeted services for the disadvantaged and the hard to reach** must be expanded. Some countries – such as Luxembourg – explicitly recognise that they are at the early stages of rethinking guidance and counselling provision and practice to support lifelong learning. Others – such as Finland – judge that comprehensive services are already in place and they are now turning to specific new challenges arising from the availability of new technologies.

Both Finland and Iceland report that they are currently developing **web-based guidance and counselling** services with a European dimension, so that **a European information portal would be a definite asset** (and an idea that receives support from all quarters). The reports overall welcome the potential of ICT tools to improve the reach and quality of guidance and counselling, although Spain, for example, takes the view that these are most appropriate for conveying and accessing information. **Guidance and counselling** in the full sense of the term **cannot dispense with face-to-face interaction** – similar points about teaching in general were made under the responses to KM3 (Innovation in teaching and learning). The United Kingdom also notes that ‘borderless’ services continue to need local elements and must be readily accessible for those with low levels of skills and qualification.

2.7. Key Message 6 – Bringing learning closer to home

Memorandum Objective: Provide lifelong learning opportunities as close to learners as possible, in their own communities and supported through ICT-based facilities wherever appropriate

Member State/EEA **responses to this key message are**, with few exceptions, **quite brief** and do not choose to venture onto noticeably new territories of ideas and action. One reason may be that several countries (for example, Denmark, The Netherlands, Finland and Sweden) have long practised decentralisation and local autonomy and enjoy established community education traditions. Therefore, they see themselves as already providing a range of learning opportunities close to home, both in physical terms and in terms of responding to local and individual needs and demands. The French report, however, does provide a hint that perhaps this was a key message that appeals to some quarters of interest rather more than to others. The French Ministry of Employment records that KM6 had engendered little enthusiasm amongst those contributing to that part of the consultation process for which it was responsible. The French Ministry of Education, on the other hand, views KM6 as a priority issue and considers, as does the Portuguese report, that all schools could become multi-purpose local learning centres (MPLCs, one of the main proposals in the Lisbon Summit Conclusions) in the future. Overall, the national **reports focus their attention on MPLCs and other elements of decentralisation and regionalisation** measures. Family-based and intergenerational learning also attracts some attention, which is perhaps the most novel accent emerging from the responses.

Responses may have been relatively brief, but they show a **high level of consensus** on the issues discussed. All agree that effective measures to bring learning consistently into everyone’s daily life requires that policy **mandates**, funding **resources and practical autonomy of action** are placed **into the hands of local and regional authorities and actors**. Improved communication and cooperation between all those currently and potentially involved must be assured, and effective links established with national and European levels of policy and action. National authorities and actors are (at least) responsible for framing broader policy guidelines and ensuring proper distribution of resources throughout their country,

whereas **European-level action should promote the exchange and dissemination of good practice between localities** (within and across countries).

2.7.1. Networks and partnerships

Measures at local level must succeed in motivating people by **creating a range of learning-friendly environments**. There is universal support in the national reports for **MPLCs**, which **should become the nodal points** in these local networks of provision. These local learning centres should be **designed and managed through multi-lateral partnerships** that genuinely include all actors. There is certainly strong interest in joining such initiatives – the contribution from the French Ministry of Youth and Sport, for example, underlines the willingness of **civil society associations and groupings** actively to support the development of **MPLCs**. Their members **have considerable expertise in non-formal and informal learning**, a point that is also made in the German report with respect to youth organisations. Finland and The Netherlands, too, note their good fortune in having a rich supply of NGOs working in social, educational and cultural fields at local and regional levels. The Dutch report records that, in general, the country can look to strongly embedded structures and traditions for teamwork across occupational specialisms and working settings. Many more reports (for example, Germany, Ireland, Luxembourg and Portugal) note the high value placed on partnership and networking traditions in their countries and the commitment to their further development in the light of implementing lifelong learning.

The **Social Partners** receive frequent mention as **a crucial element** in such partnerships and networks, all the more so given – as Norway emphasises – that the workplace is the single most important daily learning arena for a large section of the population. Where **MPLCs** succeed in bringing together a varied spectrum of experience and expertise, their work could play a significant role in making progress towards new ways of valuing learning (which links back to the responses under **KM4**). Spain suggests that they might also coordinate local skills needs analyses. Norway adds that care must be taken to **ensure the appointment of appropriately qualified staff** to work in such centres. In other words, they should not have to rely on a human resources patchwork lacking adequate status and working conditions.

Promoting **learning regions and learning cities also receives broad support** in this context (see, for example, Germany, Greece and The Netherlands). Germany has just introduced the action programme *Lifelong Learning for All*, with the promotion of learning regions and networks as a key element. The United Kingdom is not, however, in agreement with the idea (raised in the Memorandum) that local and regional authorities be asked to devote a given percentage of their annual budgets to lifelong learning. Other reports did not address this question, and so it is not possible to judge the overall level of support or otherwise for the idea.

The **Icelandic report** devotes considerable space to **KM6**, offering **an illuminating example of a working model of bringing learning close to home**. Based on the realities of the small world, Iceland enjoys a long established tradition of distance education and places the social

fabric of learning at the centre of policy and practice. The education and training system as a whole is accustomed to working flexibly, collaborating across sectoral and specialist boundaries and relying on team-based partnerships and networking. It has already set up regional learning centres, which have always placed emphasis both on the needs of those with low levels of education and skill, and on designing tailor-made solutions for micro-communities.

2.7.2. Facilitating access

It is evident that Member States/EEA countries see **the potential of MPLCs as bound up with integrating ICT and eLearning** into their organisation and working methods. For example, Luxembourg is already setting up local telecentres as part of new adult education initiatives and within the framework of its implementation of eLearning. In The Netherlands, the government initiative *ICT and the City* has created *SeniorWEB*, a community portal designed for the elderly. Denmark's report underlines, in this context, that **technologies should be designed and applied to work positively for people**. They should not reinforce the disadvantage and isolation which particular groups may already experience – such as the elderly, those living in remote areas and the disabled. The aim should be to enable full participation in all learning settings and full access to all learning resources. Responses to KM3 (Innovation in teaching and learning) also note the **potential of 'old' communication technologies** – long used in traditional distance learning – **to maximise access**. The United Kingdom provides information on a panoply of initiatives that bring together community learning and ICT tools as new forms of service delivery. These include: *UKOnline*, a public-private multi-lateral partnership to encourage universal access to the internet; the *National Grid for Learning*, which focuses on developing ICT infrastructure in schools and for teachers; and the planned *People's Network*, providing lifelong learning opportunities through libraries, museums and art galleries.

Optimising access to learning close to home will also mean **ensuring that practical support services are made available through local learning centres** as a matter of course. The French report, for example, mentions providing childcare facilities, transport and guidance and counselling. Such issues link back to the responses under KM2 (More investment in human resources), in which non-financial barriers and incentives are an important element of the discussion about providing resources and recognising the full range of investment. Several reports draw attention to **gender-specific issues associated with removing non-financial barriers to learning**. Austria, for example, notes that shortage of time for learning is not only a matter for the employed, but equally for those with full-time family and caring responsibilities. Juggling family and work commitments with personal and professional development remains considerably more difficult for most women than for most men.

Finally, a number of reports (for example, Flemish Belgium, Greece, Ireland, Norway, Spain and the United Kingdom) make specific mention of the importance of **family-based and intergenerational learning**. The United Kingdom has already begun to introduce measures in

favour of family-based learning (such as the *Family Literacy and Numeracy Initiative*) and state interest in doing more. Spain points out that these **are both neglected areas**, and suggests commissioning research to gain a better understanding of how to **make better use of their potential** for lifelong learning. Both Spain and Norway raise the issue of recognising and benefiting from the experience and skills of **older workers and senior citizens acting as mentors and non-formal tutors** in a range of contexts, including the workplace. More thought might also be given to creating intergenerational learning exchanges, whereby older and younger people teach and learn from each other according to their particular strengths.

3. Epilogue

The concept and practice of lifelong learning opens up broad horizons for debate and policy action at all levels of European economies and societies. It is impossible for any one exercise to address all the issues in sufficient depth and breadth. The Member State/EEA reports brought together a wealth of information and views in response to one single contribution to the discussion, the European Commission's Memorandum. The bulk of the individual criticisms they level at the Memorandum itself centre on the wish to have seen more in-depth discussion on a whole range of particular topics, all of which are unquestioningly important, but which could not all have been included in a genuinely satisfactory way. The Memorandum could not possibly satisfy the evident demand for informed and inclusive debate on implementing lifelong learning in Europe, but the responses emerging from the consultation process deliver a rich seam for further exchange of information and good practice at European level. Future debate and action at all levels will thus be able to pursue specific topics and priority issues in a targeted and more precise manner.

From the broad spectrum of possible themes, this review highlights four issues that could contribute to further debate on implementing lifelong learning. This choice makes no claim to comprehensiveness and does not suggest that these issues should necessarily take priority in that debate. It simply represents the kinds of questions that emerged through the process of the review.

3.1. Valuing non-formal and informal learning

The distinction made in the Memorandum between formal, non-formal and informal learning as equally important kinds of learning was taken up very positively in the Member State/EEA reports. They gave considerable attention to the need to develop new forms of recognition and assessment to take account of the outcomes of different kinds of learning in different kinds of settings. But firstly, there is a real issue of how to strike the most productive balance between complementarity and integration between formal and the non-formal/informal sectors and their ways of working. Over-emphasising complementarity may contribute to differentiation between sectors and create barriers to learning. Over-emphasising integration may bring assessment-driven learning into non-formal/informal settings, which could hamper the quality of learning. Secondly, disaggregating participation from assessment is currently seen as one innovative option for widening access to gaining recognition for knowledge and skills, regardless of how they have been acquired. However, many education and training experts argue that the learning process in itself is a significant and perhaps definitive component of learning outcomes in their full sense, not least because learning is essentially a social process. Assessment without prior participation can only be summative in nature, whereas participation is formative – that is, learning processes integrate personal and social development with knowledge and skills development. This has been a forceful argument, for

example, in support of apprentice-type initial vocational training and the importance of occupational identities for contributing to Europe's competitiveness.

3.2. Curricular reform

There is clearly still a long way to go in arriving at robust and agreed definitions of basic skills for today's world, both in their own terms and in relation to foundation skills, core skills, key skills, generic skills and, more broadly, higher-level skills as a whole. The Member State/EEA reports may or may not have concurred with the implicit distinction between 'old' and 'new' basic skills relayed by the 'Lisbon list', but most reports certainly multiplied that list, either by adding new skills or by differentiating broad categories (such as 'social skills'). Whatever the conclusions at national or (possibly) at European level, there seems little doubt that education and training curricula will require significant restructuring in order to fit in the essentials without overloading teachers, trainers and learners. This will mean reorganising curriculum time, space and content both within formal education and training and between formal, non-formal and informal settings for learning. It will mean reconsidering what knowledge and skills young people should acquire during initial education and training, how best to recoup the situation if they do not manage to do so, and what kinds of knowledge and skills can best be acquired, maintained and updated following initial transition to adult, working and family life.

3.3. Technology and pedagogy

Harnessing the potential of ICT for improving access to and quality of teaching and learning was very much at the forefront in the Member State/EEA reports when considering innovative methods. The importance of this impulse and opportunity for both policy and practice can hardly be underestimated. There is, nevertheless, much more that remains to be thoroughly discussed. Firstly, education and training researchers and practitioners tend to hold healthily sceptical views of the virtues of 'technological fixes' in relation to resolving pedagogical challenges. The history of modern education and training is littered with examples of defunct technologies for learning, whilst shaping and achieving positive learning experiences and outcomes for all remains an elusive goal. Secondly, teaching and learning methods have still to find reliable and effective ways to educate and train active, critical, independent-minded democratic citizens across the board. This is a longstanding issue within the professional community of education and training specialists, but has not always attracted mainstream policymaking attention. This is beginning to change, partly because of greater recognition that these qualities underpin the personal, social and professional skills best suited to knowledge-based economies and societies – and partly also because young Europeans are increasingly

asserting their own case for changes in education and training to reflect the realities of their lives ⁽¹⁸⁾.

3.4. Work-life balance

The term ‘work-life balance’ now appears quite frequently in national and European policy documents. It is a genuine attempt to encapsulate a set of issues about the imbalanced distribution of employment (overworked employees versus chronic unemployment), making time and space available for learning within and outside working hours, and, last but not least, addressing gender-specific inequalities in balancing work and family responsibilities. The Member State/EEA reports included much reference to and some examples of policies and measures to support work-life balance, largely in considering ways to raise investment in human resources. The benefits of improving work-life balance may be seen from the point of view of the enterprise (improved job-relevant knowledge and skills; better employee motivation, morale and health) or the individual (greater personal and professional satisfaction; advancement opportunities; improved quality of life). But on closer inspection, much of what is discussed – here and elsewhere – begins from the standpoint of the workplace or of the individual as employee. Viewing the prospects for improvement from the standpoint of the home or of the individual as a private citizen is a rarer exercise. However, the costs and benefits of learning may be calculated and experienced quite differently, depending on where one is standing and whose interests are in the forefront. In addition, the patterns of people’s lives in the long term (the lifecourse) and the short term (rhythms of daily life) are demonstrably in flux, bringing new options for organising time and space in much more individualised ways. As workplaces and homes begin to overlap for more people, so will different kinds of learning intersect – achieving an acceptable balance may gradually slip further from the reach of public policy and require more effort from individuals themselves.

⁽¹⁸⁾ The Internet site http://www.europa.eu.int/comm/education/youth/ywp/whitepaper_en.pdf provides relevant information on this question in the context of the consultation in preparation for the European Commission’s White Paper on Youth: A New Impetus for European Youth, COM(2001) 681 final, Brussels.

Annex I: Materials and review method

This review is based on 18 separate reports delivered to the European Commission as part of the consultation process on its *Memorandum on Lifelong Learning*. All 15 Member States sent in a national report, with Belgium sending in two reports, one for Flanders and one for Wallonia. These two reports were themselves made up of separate inputs from different parts of government. The French report also comprised separate inputs from the Ministries of Education, Employment and Youth/Sports together with an overall government input. Two EEA countries, Iceland and Norway, also sent in national reports.

Most of the reports were available for review by the end of July 2001. They ranged from under 15 to over 100 pages in length and were written, for the most part, in the country's official language (or one of these). One or two reports were delivered in English at the outset, with several more arriving in English translation subsequently. Many – but by no means all – reports structured their responses under the Memorandum's six key messages, as the European Commission had requested. Most reports did not, however, address themselves specifically or even in general terms to the questions that accompanied the key messages. Rather, the exercise was used as an opportunity to give a state-of-the-art account of their own activities.

The reports had been put together in a variety of ways. Some had been prepared within one coordinating Ministry, with input from other Ministries. Others had been prepared jointly by relevant Ministries, on occasion with visibly separate contributions from each. In other cases, the responsible Ministry had commissioned the preparation of the report to external specialist agencies or institutes working in a relevant field. Some reports presented more or less official government views. Others acted as a channel to present a variety of views, including contrasting views, from different expert and interest groups (which varied from report to report). At the time of writing, one or two reports officially remain drafts.

The review task was therefore both large-scale and complex. It was undertaken on a team basis and took the form of a standard content analysis, working in the first instance from a thematic grid which was inductively derived from a sample of the national reports available in early July and subsequently modified as needed. This permitted both analysis by key message and transversal analysis across and beyond the key messages. Repeated steps of classification, filtering and synthesis were conducted over an extended period. Each report was read in full and analysed by at least two individuals, at least one of whom read the report in its original language. Readers/analysts were exchanged at each subsequent stage to ensure a broad and balanced outcome.

The main purpose of this review is to provide background information and analysis to accompany a separate policy document. The emphasis therefore lies on description and illustration, not on a comprehensive replay of all points raised in all reports. The synthesis inevitably sacrifices individual detail in favour of providing overall nuances. The review is not an evaluation of the accuracy and quality of the Member State/EEA reports, and there has

been no attempt to add information about national policies and practices by the analysis team, even where this might have been available to them from other sources. Therefore, this review does not claim to provide an accurate reflection of the shape and direction of national views and policies as such, but simply aims to relay the information in and the tenor of the Member States'/EEA countries' own reports of their views and policies. This means that this review is a tentative analysis of policy discourse; it may or may not be an accurate reflection of policy perspectives and social realities in the Member States, Iceland and Norway.

Annex II: Proposals for research and action contained in the Member State/EEA reports

Proposals for research

EU research should complement Member States' research and pool research information

- comparative research into learning approaches and methodologies to support lifelong and lifewide learning concepts, covering specific issues, such as, gender, target groups, outcomes of EU programmes and initiatives;
- basic skills, including open adult learning models for basic skills, identification and acquisition of learning to learn skills, ICT competences, skills and literacies needed to live effectively and tackling these deficits, development of a competence-based learning culture;
- **economic and social return of investment in/benefits of LLL**;
- theories and research methods to understand personal learning, motivation, rewards and behaviours;
- training leave arrangements and incentive schemes;
- **teaching and learning methods** (transnational and national research), including ICT-linked and different methods for different new basic skills (with active participation of practitioners), and how new learning approaches can adapt to the needs of different groups;
- learning environments, scenarios and contexts that also reflect social, cultural and gender differences inherent in the different national education and training systems
- quality of in-company staff development;
- action research in identification and dissemination of good practice; involvement of ET practitioners as a regular feature of applied educational research;
- innovative forms of training, including evaluation of participant profiles and outcomes;
- new forms of certification, including via informal learning;
- quality assurance in C(V)ET institutions, in guidance and counselling services.

Proposals for action - EU level

- **promote EU level LLL research and monitoring** (e.g. via observatory/institute), including user-friendly, up-to-date database of relevant research in Europe;
- active cooperation with OECD, UNESCO and ILO in research and monitoring activities, including development of indicators, to create synergies;

- **coordinate evaluation, exchange, transfer and adaptation of experience, information and good practice on implementing LLL**, in relation to priority themes relevant to all key messages. Revise and harmonise educational terminology to promote cross-country understanding and dissemination, also at local level;
- create a dynamic European map of LLL, with the possibility to create a pluriform but coherent framework of developments;
- LLL promotion campaign (jointly with Member States);
- review all EU programmes, funds and initiatives in terms of their contribution to LLL and as a result:
 - pool resources for LLL more effectively and increase funding to cover new activities, such as transnational mobility for adults and for professional adult educators/trainers,
 - improve coordination between them and provide guidelines on how the ET sectors can best profit from them,
 - continue successful existing initiatives and facilitate integration into mainstreamed national mechanisms,
 - integrate the follow-up to the LLL Memorandum in the follow-up to the Objectives Report, and link related activities of the European Employment Strategy, the Transparency and Quality Fora and the Advisory Committee on Vocational Training;
- task force to develop a reference framework and minimum standards of achievement for basic competences, including literacy and numeracy; establish a platform to exchange information on prerequisites for LLL and anticipation of knowledge needs, including those with special needs;
- continue to develop methods of evaluation and mutual recognition of qualifications. The process needs to be transparent, easy to monitor, and respected by all Member States and should:
 - simplify recognition procedures and prevent credential inflation tendencies; harmonise occupational competences,
 - expand the Transparency Forum to address the question of assessment and recognition of non-formal learning, e.g. starting with work-based learning contexts; European competence portfolio, linked with European CV, Diploma Supplement, etc.,
 - establish national centres for accreditation of prior and experiential learning (APEL) in the Member States and develop minimum qualifications standards for APEL portfolio;
- priority action for training of teachers for new roles in all sectors and levels;
- continue developing ICT learning packages and make available free or at nominal charge;
- increase support and develop quality guidelines for information, guidance and counselling networks; facilitate practitioner mobility; promote innovative modes of guidance/counselling (integral part of the LLL process); create a European Internet portal for databases work and learning opportunities;

- make funds available at local level e.g. to establish local learning centres and install ICT, especially for adult/community providers (including NGOs), to enable small companies, excluded groups and deprived communities to participate in learning, and for exchange of experience in the library and liberal education domains. Use Structural Funds for this purpose in line with specific local needs.

Proposals for action - National level

The following summarises the main elements of proposed action at Member State level. More complete details of what individual countries are proposing or have already embarked on can be found in the national reports (¹⁹).

- **Encourage universal and continuing access**
 - individual right framed by collective agreements (F);
 - right to learn guaranteed by public authorities (B-nl);
 - lifelong learning for all action programme, including making available ESF co-funding in cooperation with the social partners (D);
 - encourage individuals to take responsibility for their own learning (UK);
 - improve access routes, including wider delivery, e.g. using libraries, museums, family and community learning initiatives, etc. (B, DK, IRL, A, FIN, S, UK).
- **Promote learning among vulnerable groups and those hard to reach (B, DK, D, IRL, I, NL, A, UK)**
 - more resources for the disadvantaged, low-qualified and women, including free provision to recoup compulsory education (A);
 - attainment of minimum qualifications for those whom school is failing (B-fr, IRL);
 - Vocational Education Qualification Campaign in cooperation between federal government and Social Partners to raise participation levels in CVET, especially for the low-qualified and disadvantaged, and with a particular accent on workplace learning and eLearning (D);
 - focus on the unemployed trying to re-enter the labour market (NL);
 - awareness/motivation-raising campaigns and promotional activities (B-nl, DK, L, A UK);
 - action research and initiatives to raise motivation (NL);
 - improve access to, and development of, alternative learning methods (UK).

(¹⁹) <http://www.europa.eu.int/comm/education/life/index.html>

- **Raise the overall level of basic education and increase overall participation (EL, NL, FIN)**
 - prioritise early childhood education and child care sector (FIN, N, P);
 - increase influx to polytechnics (FIN);
 - boost level of education among adult cohort, especially older workers - through company-based CVET (D, FIN) and opening adult access to higher education (D);
 - encourage older workers to gain post-secondary qualifications (NL);
 - development of the adult education system (EL), attention to literacy for adults (IRL);
 - requisite skills for workforce entrants and upgrading of these skills (IRL, FIN).

- **Develop innovative qualification routes including**
 - modularisation (B-nl, DK, IRL, A);
 - portfolio (A);
 - enhanced personalised and flexible paths (DK, I);
 - horizontal approach across different sectors and actors (B-nl);
 - upgrading the vocational route with improved pedagogic support for work-related learning and more work-adjusted studying models (E, IRL, I, FIN);
 - create synergy and capitalise on innovative projects (N, NL);
 - conduct R+D on innovative teaching and learning for different groups and contexts (UK);
 - develop ICT-based learning, esp. for use in work-based learning (UK).

- **Develop assessment and accreditation of formal, non-formal and informal learning**
 - promote APEL (EL, F, NL, A, UK) and recognise vocational qualifications (N);
 - establish independent bodies to evaluate and assess competences (EL, L, NL);
 - harmonise qualifications, agreement between EL, E, F and I for issuing common diplomas in the hotel sector and automobile mechanic fields;
 - establish a database for recognition of higher education qualifications from abroad, implement Diploma Supplement (N) and use ECTS more broadly (B-fr, N);
 - more coherent qualification frameworks (UK).

- **Provide the facilitative framework needed so that all actors can play their own role and cooperate**
 - government authorities to clearly define their responsibilities (B-nl);
 - partnership approach (e.g. include community groups, partnerships across providers with employers, etc. (IRL, UK);
 - establish independent bodies to develop reference framework for apprenticeship, evaluation and recognition (I);

- increase involvement of social partners
 - establish an inter-ministerial committee on LLL, including Social Partner representatives (L);
 - improve tri-partite commission in the sectors (FIN);
 - no regulation, voluntarist approach with Government as investor and enabler (UK);
 - create local learning centres (B-fr, DK, D, E, IRL, A, P, S, UK), develop locally relevant and locally delivered policies (UK).
- **Quality assurance**
 - quality assurance for LLL (DK, EL);
 - develop national certification systems (EL, I), improve recognition and qualification processes (D, F) and evaluate good practice (D), develop assessment of skills (FIN);
 - quality assurance in VET through quality labels (A), Investors in People type schemes (IRL, NL, UK);
 - improve the quality of higher education, via investment in ICT and collaboration with higher education teaching professionals (A);
 - setting quality-related national standards and targets (UK).
- **Prioritise the training of teachers and trainers (DK, F, I, N, NL)**
 - reform their training, and introduce new qualifications (B-fr, IRL, UK);
 - induction arrangements, continuous professional development, ICT qualifications to ensure teachers feel competent to teach using ICT (UK, N).
- **Enhance information, guidance and counselling (IGC) services**
 - more promotion of IGC services (UK), promote guidance networks and create new synergies (I, A);
 - improve access points, e.g. through using ICT and range of media (B-fr, A, S, UK);
 - improve the skills of guidance practitioners (F, S), provide new qualifications or occupational profiles (DK, E, UK);
 - public information portal to prevent digital divide (F);
 - improve responsiveness and ability to participate in learning by including those targeted in service delivery (UK).
- **Secure and increase funding (IRL, I, A, FIN, UK)**
 - through plethora of financial and other incentive schemes targeted at enterprises, trade unions, individuals, etc. (UK);
 - conduct assessment of participants' learning costs (E);

- improve fiscal incentives (I, NL, A);
 - further explore (and develop) individual learning accounts (ILAs) (IRL, I, NL, S);
 - further collective agreements, educational leave (F, A) and flexible working arrangements (NL);
 - improve resourcing for higher education (FIN).
- **Monitor changing skill needs and ICT developments (EL, L, FIN)**
 - provide ICT skills for all (DK, FIN);
 - ensure standards for ICT tools and materials (L, UK);
 - develop eLearning and invest in ICT training materials and equipment (B-fr, DK, D, E, IRL, P, S, UK), e-university, virtual university (NL, FIN, UK), numerous ICT targets, e.g. assessing ICT competence (UK).

Proposals for action - Regional and local level

In the countries with a federal or decentralised administration and education and training system (Belgium, Germany, Spain, Italy and Austria), the importance of regional- and local-level action is an inherent part of the approach to LLL, though this was sometimes understated in their reports. Following recent devolution, the United Kingdom also emphasises development at regional and local level, with each devolved parliament responsible for putting its own stamp on these. New activities have been initiated, particularly relevant to KM5 and KM6. Other countries, too, support action at local level in the form of partnerships and networks. France calls for strengthening local partnerships based on holistic internal organisation, Sweden has used EU funds to create partnerships, and Portugal, like Italy, intends to pursue the Lisbon recommendation to develop local learning centres. Belgium, Germany and Austria will expand their regional and local learning centres. Under new legislation, 10% of the adult education budget in Denmark is set aside for course curricula based on local interest and needs. Further proposals focus on local activities in favour of guidance and counselling (Spain, Austria, United Kingdom), basic skills (Italy), and socially and geographically disadvantaged groups (Austria and Iceland).

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Cedefop (European Centre for the Development of Vocational Training)

**Consultation process on the European Commission's Memorandum on lifelong learning:
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Following publication of the European Commission's Memorandum on Lifelong Learning, a wide consultation process was conducted, in the first half of 2001, among citizens and key actors responsible for implementing lifelong learning at local, regional, national and European levels.

The Directorate-General for Education and Culture asked Cedefop to undertake a review of the Memorandum consultation reports received from the Member States and the EEA countries. This document presents the outcome of that review, which is intended as accompanying background information to the European Commission's follow-up Communication on lifelong learning. The first section of this report provides a succinct overview of the main trends in the reports. This is followed by thematic analyses for each of the Memorandum's six Key Messages, preceded by a short introduction. In the interests of contributing to further discussion, the report concludes with an epilogue on some issues that might have been addressed more fully, whether in the Memorandum or in the reports.

Consultation process on the European Commission's Memorandum on lifelong learning

Analysis of national reports



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