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Individual Learning Accounts

Case study - Estonia

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Content

Abstract

In Estonia, despite a rhetoric praising ‘private initiative’ and portraying education as something anyone must strive for, the state plays a key role in the provision of adult learning. The latter is achieved by the large role of organisations of the public formal education system as the providers of both formal and non-formal adult learning. The state relies mainly on provider-mediated/supply side strategies for providing financial support for adult learning, including public procurement. Recent elements added – such as the initiative to provide free training opportunities based on ESF funding – expand this system. The ‘Training with a Training Card’ run by PES is one of the few examples of participant-mediated/ demand-side instruments supporting participation in adult learning. Overall, individual choice in access to adult learning is mainly supported via a database which provides an overview of available learning opportunities provided for no or low fees. In sum, a variety of support instruments are already in place that work towards achieving the goals of the Council Recommendation, albeit predominantly by a substantially different institutional set-up. Therefore, the fit between a potential individual learning account and current overall funding arrangements based on supply-side funding approaches might be considered as limited. Moreover, certain features of the adult learning system were found as not fully developed to allow a smooth implementation of an ILA-type instrument. Against this backdrop, working towards some goals of the ILA Recommendation within established structures of the adult learning system, and improvements perceived as required prior to implementing novel support instrument for individuals related to the ILA Recommendation, have been considered central. This includes measures to mitigate differences in participation in adult learning across socioeconomic groups, better align available learning offers with the current or future needs of the labour market and improving the quality of provision in all segments of the adult learning market, including those currently outside any form of state oversight.

Chapter 1. Introduction

1.1 Objective and the approach for country case studies on the response to the Council Recommendation on ILA

This case study on Estonia is part of a broader Cedefop study on individual learning accounts (ILAs). The study aims to explore the potential for developing ILAs in selected EU Member States and provide support to policymakers, social partners, and other stakeholders in designing and implementing ILAs. Based upon the Council Recommendation on ILAs and existing academic and applied research literature, the study proposes an analytical framework that identifies the key functions of an ILA and the elements of the 'enabling framework' (including career guidance, validation of non-formal and informal learning, paid training leave, etc.) needed for successful ILA implementation and use. Using the developed analytical framework as a reference, the case studies - Austria, Germany, Netherlands, Ireland, Estonia - examine in-depth the countries' current financing policies/instruments available to support individual learning as well as the 'enabling framework'. The country analysis provides a better understanding of the strengths and challenges of the current arrangements relevant for ILAs in selected countries, and of the potential actions that would need to be taken for the development of ILAs (or ILA relevant arrangements). The case studies draw on desk research as well as primary data collection and build on input from national stakeholders/experts (collected via interviews, focus group discussions and validation workshop). Policy developments were followed until 31st of March 2023 (cut-off date for data collection). The case studies provide a description of the overall socio-economic context of the country and status quo regarding its adult learning system, including an overview of all main funding instruments and existing arrangements of the enabling framework. Based on the analytical framework, one selected ILA-relevant national-level key instrument is reviewed in detail per country and studied to what extent it fulfils ILA functions, which is followed by a review of this instrument implementation in two skills ecosystems (e.g. sectors and/or regions) and/or a review of an additional sectoral/regional instrument. Based on the identified strengths and weaknesses of the system, three policy sketches (with SWOT analysis) considered as realistic (at least in the long run) for implementing ILA (or ILA relevant arrangements) and the enabling framework are presented for each country. Building on these findings, country-specific policy reflections for implementing ILA (or ILA relevant arrangements) are formulated.

1.2 Case of Estonia – an introduction to the case study

Estonia has been attracting considerable international attention for its steep progress in the field of adult learning (OECD, 2020) and for its good performance in cross-country comparative assessment in education more generally (Mehisto & Kitsing, 2022). The success story of the adult participation in lifelong learning complements the strategic decision of the Ministry of Education to brand the country as #Education Nation, following its high scores and leading results in PISA study of 8th-graders. By contrast, PIAAC, 'the PISA for adults' has highlighted

that the generally highly educated workforce tends to gain less new skills and capabilities during their working years, compared to the similar groups in other countries. The public belief in the relevance of education – and to a lesser extend CVET/training – is indeed a national pursuit and fits well into the neoliberal-leaning policy priorities that put emphasis on the individual's responsibility for achieving employability and improving one's labour market prospects.

Following reinstatement of independence, Estonia has actively pursued reforms to its education system, including the adoption of one of the earliest Adult Education Acts (1993) in the EU. It could also build upon an already well-developed qualification system for adult educators, the latter leading up to degree programmes. Furthermore, among the Estonian public, there is a strong belief in the economic benefits of adult learning and that education and learning are relevant for the society as well as for the individual. Individuals' skills and qualification are seen as human capital and therefore a national treasure. In consequence, in addition to the individual responsibility, the state as well as and employers are regarded as having a key role in securing access to learning opportunities.

Against this backdrop, it is little surprise that despite the many structural transformations in society and the position among the countries with lower than average level of GDP per capita, Estonia belongs to the EU countries which have a particular focus on adult learning in the use of its European Social Fund resources (Ecorys & Ismeri Europa, 2020). Between 2014 and 2018, 35% of all ESF contributions were used for supporting education and training, of which 44% were spent on adult learning, the latter equal to 107 EUR Mio (including national contribution), reaching some 35 000 adults. The framework of active labour market policy makes important and increasing contributions to adult learning in Estonia (OECD, 2021). However, by comparison, the investments in the training of the unemployed and the employed are still comparably low.

When the European Commission published the Recommendation on Individual Learning Account, as stated by the experts interviewed for this case study, this did not warrant much national attention in Estonia apart from the professional spheres of policy implementation. Whereas the wider national debate specifically on ILA recommendations had not happened by the Fall of 2022, experts in the field had come to well informed opinions about the pros and cons of an ILA approach.

The current case study analyses to what extent existing financial instruments in Estonia are already working towards the goals identified by the ILA Recommendation and to what extent established policies are providing the required 'enabling framework'. Furthermore, the study provides insights on the questions of how existing financial instruments might be best expanded or novel instruments might be introduced to make further steps towards the goals of the ILA Recommendation. The case study is based on a literature review and desk research and input from national experts. Ongoing policy processes summarised in the report were followed up till the 31st of March 2023. Field work for this case study was implemented between October 2022 and March 2023, with results from 21 expert interviews and two focus group discussions (with, respectively, 8 and 5 participants). Interim findings were shared with research participants in May 2023, including a stakeholder workshop, for gathering further feedback.

This case study is structured as follows. In Chapter 2, an overview on the Estonian socio-economic context as relevant for adult learning is provided. Chapter 3 reviews the core features of the Estonian adult learning system, starting with an overview on participation patterns in adult learning. Next, particular attention is paid to the governance structures for adult learning. Chapter 4 explores funding arrangements for adult learning and in particular, the role of the state in funding adult learning. Chapter 5 reviews the essential elements of the system which are decisive for taking up adult learning and are identified in the ILA Recommendation as the 'enabling framework'. Chapter 6 explores two key funding arrangement in more detail (Labour Market Training with a Training Card; Supply-side funded adult learning) and explores the question about the role of regional disparities in the use of national level policies. Estonia is a small and highly centralised state, however regional diversity in both provision of learning opportunities, in participation patterns as well as the underlying factors should not be underestimated. Chapter 7 summaries the features of Estonian adult learning system against the backdrop of the ILA Recommendation. Chapter 8 discusses three policy sketches, exploring the opportunities to improve the 'enabling framework' and analyses why the introduction of a new funding scheme may be a challenging endeavour. Chapter 9 provide lessons learnt for policy making relevant for Estonia and for other Member States.

Chapter 2. Estonia's socio-economic context and its relevance for adult learning

Estonia belongs to the rich world at a global scale, with a real GDP per capita in 2022 of EUR 16 905 (Eurostat, nominal expenditure per capita, table prc_ppp_ind [31.05.24]), ranking 17 among the 27 EU Member States. The economy has shown outstanding growth rates over the past decades, which can be traced back to Estonia's business friendly policies (ranking first in the EU in the Index of Economic Freedom (see Figure 5 in the Annex). Overall, Estonia's level of economic performance would be typically associated with some limitations regarding adult learning, however, with its high level of participation, it represents an outlier among the group of countries with comparable economic levels.

For the past decade, Estonia saw low to moderate levels of inflation between 0.1 and 4.2 per cent, however, in 2022, inflation jumped to 19.4%, the highest value in the EU (EU average: 9.2) (Eurostat – TEC00118 [24.2.23]). This high inflation rate needs to be seen as a source of pressure for the public funding for the adult learning system.

Estonia's unemployment rates were markedly reduced from comparatively high levels after the 'Great Recession' (2008 onwards) up to the strike of the Covid-19 pandemic. Its unemployment rate has been below EU-average in the past decade, however with an increase to around the EU average beginning with the pandemic (6.2% in 2021, EU average: 7.0). A similar pattern is visible in the youth unemployment rate (2021: 16.7%, EU average: 16.6%). Reduced levels of unemployment have increased the PES leeway of funding training for the employed along the lines of the support for the unemployed (see Section 5.1; see also (OECD, 2021)).

After independence, Estonia's population had been shrinking mainly due emigration, adding to a substantial diaspora of Estonian decent, with a loss of 12.6 per cent of the population between 1993 and 2014. Since the beginning of 2015, Estonia's overall population has been slightly growing, accounting for 1.33 Mio (Eurostat – demo gind [1.12.22) over the past years, with the returning Estonian emigrants being the main factor. Overall, international immigration plays – with e.g. 4 900 immigrants in 2019 – only a minor role for the current society and the Estonian adult learning system. Only since the onset of Russia's war against the Ukraine (Feb. 2022 onwards), a higher inflow of Ukraine citizens has marked a change, the latter facilitated by the Ukraine minority in Estonia, being the third largest ethnic group.

Estonia's population is highly educated. In the past decade, the share of the population with educational attainment of upper secondary-level or above has remained relatively constant (2012: 83.2; 2021: 83.3), well above the average of the EU-27 (2012: 70,2; 2021: 75.1) (Eurostat – EDAT LFS [15.2.23]. The share of the population with educational attainment at tertiary level has risen from the already high level of 32.1% in 2012 to 36.0% in 2021, also above the EU-27 average of 29.5% (2021) and in the expansion of HE segment is still ongoing. Education is mainly state provided and free in Estonia, except for a private higher education segment for young people not making it into the selective state sector (Saar & Unt, 2012). The share of households' expenditure (mostly tuition fees) on total expenditures for primary to post-secondary non-tertiary educational institutions accounts for 3% in Estonia, which is below the 5% average of the 22 EU states captured in the dataset (OECD, 2022).

Undergraduate and graduate students in study programs in Estonian language are exempt from study fees if they achieve 30 ECTS per semester and 60 ECTS per year, for each ECTS under this threshold, fees can be applied by the HE institution (up to 120 EUR per credit) (European Commission; EACEA and Eurydice, 2021). Around 13% of students in undergraduate studies pay such fees. Part-time students and students in programs in other languages (7.3% of all students) can be charged fees too (European Commission; EACEA and Eurydice, 2021). Overall, the formal education sector, including schools and universities, plays an important and manifold role in providing opportunities for adult learning in Estonia and forms an important point of reference when public funding of adult learning is discussed (see Section 3.4).

Estonia's industrial relations are often considered to be fragmented and state-centred, with the state having organised the transition to a market-economy and the dismantling of the previously communist industrial relations system (Ebbinghaus and Visser, 1997; European Commission, 2008). The country consequently shows a very low level of trade union density (6% in 2019) and collective bargaining coverage (6.1% in 2018) (OECD and AIAS, 2021). Employer organisation density is moderate and accounted for 50.5% in 2018. Bargaining takes place predominantly at the company level, with some coordination of bargaining via peak associations. Neither the employer side, nor the employee side run CVET providers of systemic importance for the adult learning system.

Chapter 3. Adult Learning in Estonia: a systematic overview

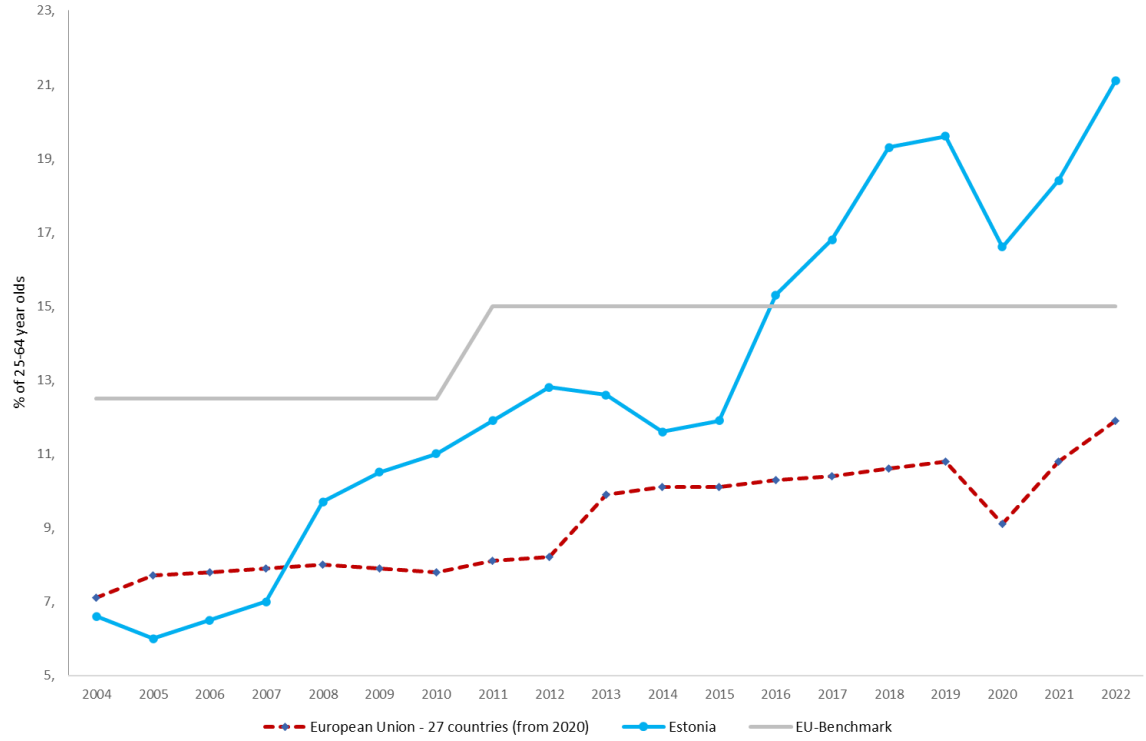
3.1 Participation patterns in adult learning

In the following, key indicators on patterns of participation in adult learning are discussed, mostly sourced from the extensive infrastructure of surveys implemented as part of the EU System of statistics on adult learning (Cedefop 2015).

Participation in adult learning is measured by two main surveys, using considerably different approaches, the latter having consequences for the revealed level of inequality across socio-economic strata (for an introduction see the methods section in (Cedefop 2015). The main measure for adult learning used to be the indicators for participation in any (organised) learning activity within the past four weeks, based on the European Labour Force Survey (ELFS). The ELFS based measure for participation excludes important forms of non-formal learning activities guided on-the-job-learning, which in consequence reduces the visibility of the effects of workplace on participation. Moreover, by using the reference period of four weeks, longer educational spells have more impact on the aggregated figures (e.g. the participation in formal adult learning). The indicators based on the Adult Learning Survey (AES) are based on a much more detailed exploration of learning activities and a 12-month reference period and are particularly well suited to capturing job-related learning activities (workshop and seminars, guided-on-the-job training), which are not covered by the current ELFS. In turn, the effects of the workplace play out stronger within the AES data. For policy making, the regularly available indicators of the ELFS are more often used in Estonia, however, it is important to take into consideration the messages of both sources to gain a more complete picture. Finally, based on statistical models, studies try to disentangle whether an observed disadvantage in participation in adult learning is linked directly to the variable of observation or only in a mediated form. In the latter case, a group might be at a disadvantage in accessing adult learning, however, this real disadvantage can be traced back to the effects of other factors (e.g. women might be disadvantaged due to the gendered distribution of men and women across workplaces offering more or less access to adult learning). In short, the results of multivariate analysis presented towards the end of the chapter do not deny the observed disadvantage by the descriptive statistics but help to rightly attribute the reasons for this observed disadvantage to various components. To conclude, in the following section data from ELFS and AES, but also results from statistical modelling are presented to achieve an overall more balanced picture.

During the Covid-induced crisis in 2020, participation in adult learning in Estonia remained well above the EU average. Adults within the 25-64 age group in Estonia continued to actively participate in learning at almost double the rate of the EU average, with 17.1% participation in 2020 compared to 9.2% in the EU. However, participation in learning schemes for the low-qualified dropped to 6.6% in 2020 from 9.2% in 2019, and participation of the unemployed also slightly decreased to 20.5% compared to 22.3% in 2019, but nevertheless remaining above the EU average of 10.6%. Participation rates broadly recovered during the second year of the pandemic and further increased during 2022 (Figure 1)

Figure 1. Participation rate of 25-64 year olds in education and training (last 4 weeks) (Labor Force Survey) – 2004-2022



Source: *Own development based on Eurostat Version of: 14.09.2023*

Table 1 presents a selection of descriptive indicators on the inequality in participation, based on the LFS (measuring participation in formal or non-formal adult learning within the four weeks prior to the survey). Men (14.4 %) participate less in adult learning than women (22.5 %). The differences in participation according to educational attainment are moderate by international comparison (ISCED11 0-2 8.6%; ISCED11 3-4 12.7%; ISCED11 5-8: 27.6%). Adults born in Estonia have a substantially higher participation rate than those born outside. Participation is declining with age (25-34: 26.3%; 35-54: 18.3% 55-64: 10.5 %). The unemployed (22.2%) participate more than the employed (19.6 %) and adults out of the labour force (11.6%).

Table 1. Indicators on inequality in participation in adult learning (formal/non-formal) – LFS, 4 weeks prior to the survey – 2021 - Estonia

		Participation	Percentage	Compared to
Sex	men	14.4	-56.3%	Women
	women	22,5		
Educational attainment	ISECD11 0-2	8.6	-221%	ISCED 5-8
	ISECD11 3-4	12.7	-117%	ISCED 5-8
	ISECD11 5-8	27.6		

		Participation	Percentage	Compared to
Place of birth	in the country	19.2		
	outside the country	13	-47.7%	in the country
Age	25-34	26.3		
	35-54	18.3	-44%	25-34
	55-64	10.5	-150%	25-34
Employment	employed	19. 4		
	unemployed	22.2	12.6%	Employed
	outside labour force	11.6	-67.2%	Employed

Source*: Eurostat – TRNG LFS 01 [15.2.23]*

Table 2 presents a selection of above-mentioned descriptive indicators on the inequality in participation based on the AES data (measuring participation in job-related non formal adult learning 12 months prior to the survey). Same as in the LFS data, men (30.5 %) participate less in adult learning than women (40.7 %). The differences in participation according to educational attainment are also moderate in international comparison (ISCED11 0-2 18.2%; ISCED11 3-4 27.2%; ISCED11 5-8: 51.4%). Participation decreases in particular for the age group of 55–64-year-olds (25-34: 38.8%; 35-54: 38.3% 55-64: 26.7%). In contrast to the LFS data, participation of the employed (43.8%) is higher than for the unemployed (10.9%), reflecting AES strength in capturing workplace related non-formal adult learning.

Table 2. Indicators on inequality in participation in job-related non formal adult learning– AES, 12 months prior to the survey – 2016 – Estonia

		Participation	Percentage	compared to
Sex	men	30,5	-33,4%	Women
	women	40,7		
Educational Attainment	ISECD11 0-2	18,2	-182%	ISCED 5-8
	ISECD11 3-4	27,2	-89%	ISCED 5-8
	ISECD11 5-8	51,4		
Place of Birth	in the country			

		Participation	Percentage	compared to
	outside the country			in the country
Age	25-34	38,8		
	35-54	38,3	-1%	25-34
	55-64	26,7	-45%	25-34
Employment	employed	43,8		
	unemployed	10,9	-301,8%	Employed
	outside labour force	8	-447,5%	Employed

Source*: Eurostat – TRNG AES 121 [2.12.20]*

Data based on a 12-month observation period have already been adopted as the basis benchmarking in Estonia. Estonia has set a target of 52.3% of adults participating in learning every year by 2030, contributing to the EU target of 60%. Additionally, Estonia aims to have 25% of adults participating in learning in the last month by 2035, up from 20% in 2019.

As levels of inequality according to single socio-economic variables do not capture the interaction of determinants of participation, we provide information from a multivariate analysis of the adult education survey (Cedefop, 2015). The model applied controls for gender, age, country of birth, presence of 0–4-year-old children in the household, educational attainment, employment status, occupation, industry, firm-size, and full or part-time work. According to the controls applied, there is no significant difference based on gender. Rather, the strongest predictors are educational attainment (those with higher educational attainment participating more), employment status (the employed participating more), occupation (the already high skilled participating more), country of birth (migrants participating less), industry (with those in the social sector participating most), and to a certain extent age (with the 55–64-year-old being at disadvantage). This analysis shows – in line with comparable research – that educational attainment and the type of work done are the key sources of inequality in participation in job-related non-formal adult learning. Moreover, it also works as a reminder that descriptive statistics would be insufficient to trace the sources of inequality, as the levels of inequality might be determined by compositional effects (e.g. the distribution of men and women across occupations).

3.2 Governance of adult learning

In Estonia, the public responsibility for supporting adult learning is concentrated at the national level. The related responsibilities are shared between the Ministry of Social Affairs and the Ministry of Education and Research. The role of the Unemployment Insurance Fund, administered by the Ministry of Social Affairs, is to map the target groups in need of participation in further or higher education, and the role of the Ministry of Education and

Research is to ensure the quality of education. Both institutions have a shared responsibility to ensure access to learning, resulting in approaches for funding of adult learning of the two bodies (see Chapter 4).

Overall, the key responsibility for participation in adult learning is assumed to be with the individual. The state is considered mainly in the role of financing the participation of disadvantaged groups, while participation in adult learning for the purpose of increasing or maintaining individuals' competitiveness in the labour market is considered as to be funded by the individual. However, employers are expected to invest in up-skilling their employees as well.

Organised business and labour have a role to play in the design/management of adult learning systems. The social dialogue for full employment and social progress came under increased pressure after the 2008 economic crisis, and the European Commission initiated a new start for a weakened social dialogue due to the decline in decentralisation and collective bargaining coverage. Overall, the Social Partners' role in steering adult learning needs to be considered in Estonia as limited by comparison to other EU Member States.

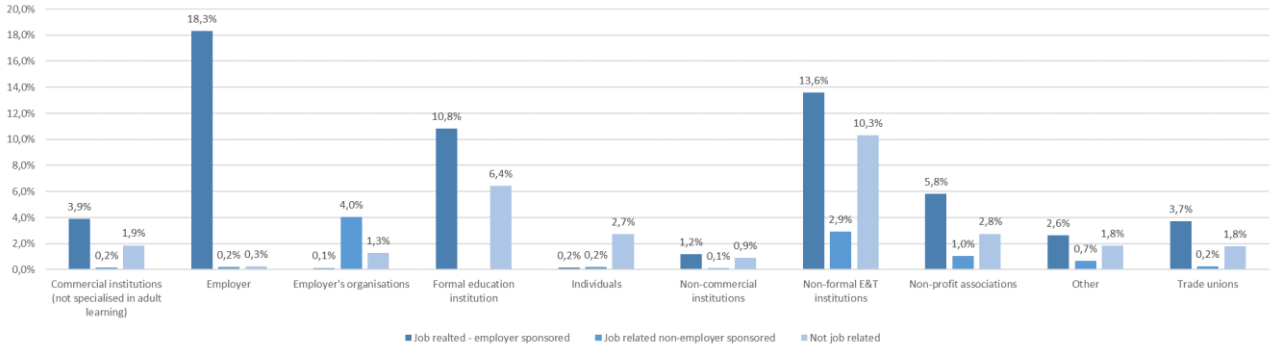
The provider structure for formal and non-formal adult learning is well-developed and encompasses a wide range of institutions and organisations, with an overall strong role of public educational institutions providing adult learning in addition to their activities in initial education. Formal adult learning is primarily delivered through vocational education and training (VET) institutions, which offer a variety of vocational programs and qualifications to meet the demands of the labour market. Higher education institutions (HEIs) also play a significant role in formal adult learning, offering bachelor's, master's, and doctoral degree programs. Adult gymnasiums provide opportunities for adults to complete their secondary education and obtain a general education diploma. Both VET and HE (provided in Estonian language) in Estonia are easily accessible and free of charge. Notably, in 2019, there were 21 VET institutions, 19 public HEIs, and 13 private HEIs operating in Estonia. Educational opportunities provided through the public organisations funded with public money are regulated and eligible for some form of quality control, however, in case of non-governmental and for-profit training paid by the learners, quality control is voluntary and non-binding. Representatives of employment policy and education system point out that there still are marked differences, whether it is possible to get trainings in some specific field or in some specific language.

Based on AES data for 2016, the overall picture can be further refined. Overall, in Estonia 59% of all hours in adult learning were spent in formal programmes, mainly provided by public institutions free of charge. This is significantly more than in the EU27 average (43%) and the second highest share for formal adult learning in the EU (second to Sweden with 67%). Figure 2 displays the importance of types of providers for the remaining 41% of all hours in adult learning (i.e. spent in non-formal adult learning).

Overall, 60.3% of hours in non-formal adult learning were captured as job-related and employer-sponsored, only 9.6% as job-related but not sponsored by the employer, and 30.2% as non-job-related, but related to general education or to leisure activities. Formal adult learning institutions play a significant role in non-formal education too (with overall 17.3% of all hours delivered. Only the own employer (18.8% - as a provider of adult learning/internal

training) and specific non-formal education and training institutions play a somewhat larger role (26.8%) than organisations belonging to the formal system.

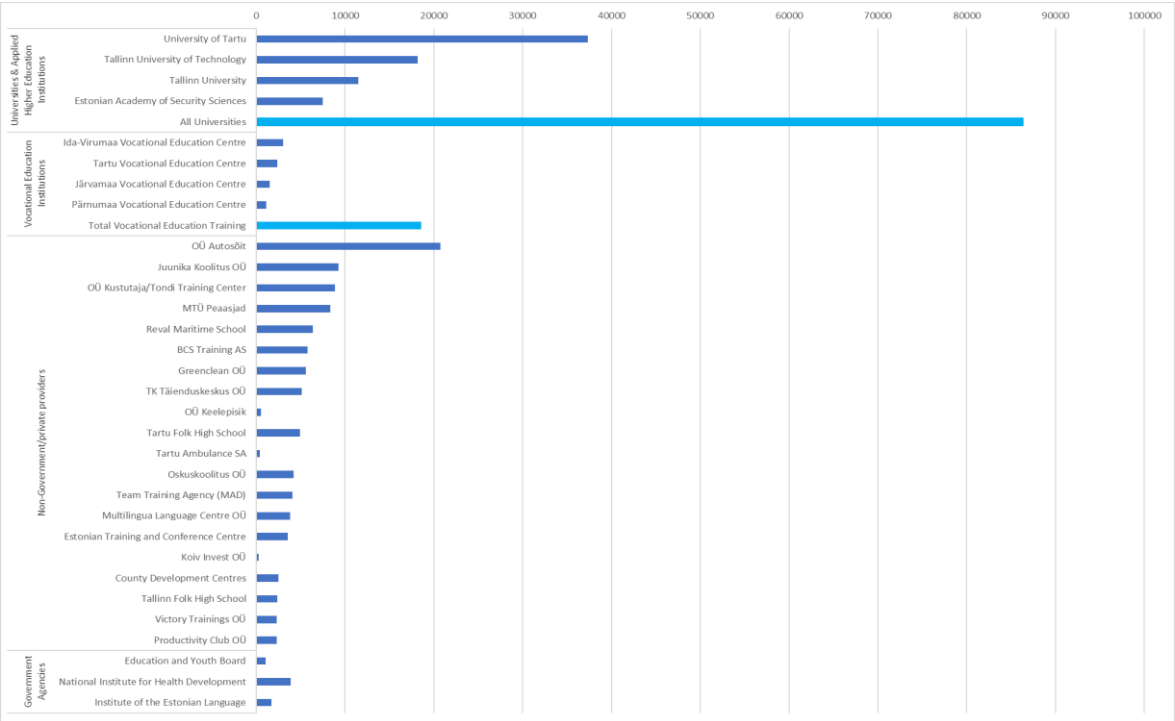
Figure 2. Estonia - Structure of providers of non-formal adult education – AES 2016



Source: AES – Special Data Extraction by Eurostat on behalf of the European Commission, own calculation Molyneux, Jenny, Cutmore, Matthew, & Biundo, Irene. (2020). Adult learning statistical synthesis report - A synthesis report drawing on statistical data relating to participation in, and the financing of adult learning in the European Member States. Luxembourg: Publications Office of the European Union.

An even more detailed account can be given based on the participant data registered in the JUHAN system (see Section 5.2 and 6.1), clearly showing the key importance of the university and the VET sector in providing non-formal adult learning in Estonia, with learning opportunities mainly for free or provided at low fees.

Figure 3. Participants of non-formal courses captured by the JUHAN database broken down for the largest providers across groups of providers



Source: Own development based on TÄIENDUSKOOLITUSED 2022. AASTAL

There is only limited evidence available on the staff teaching in adult learning in Estonia (Jõgi & Gross, 2012; Pata, Maslo, & Jõgi, 2021). Given the high importance of the formal

school system for delivering adult learning, the conditions identified for teachers in secondary and tertiary initial education partly apply also for the provision of adult learning (OECD, 2016). Moreover, professional standards for teachers in adult learning have been established and further developed over time (Eurydice database, initial education for teachers and trainers working in adult education and training in Estonia).

In Estonia, there has been a long-standing policy concern that there is a poor match between the education routes taken, the qualification provided and the skilled acquired within the education system versus the current or future needs of the labour market. In 2015, the forecast unit OSKA has been created. OSKA stands for 'Occupational Skills, Competences and Qualifications Anticipation System' (in Estonian: *Oskuste, kompetentside ja kvalifikatsioonide ennetamise süsteem*, an organisation working on behalf of the Estonian Qualification Authority (*Kutsekoda*). Its goal is to anticipate the future skill demands across socio-economic sectors, so that educational providers can update their curricula and young people and adults alike can be guided into learning activities providing skills which will be high in demand in future. More details on the ongoing discussion on making the skill needs forecasts binding for steering decisions on providing support for adult learning are discussed in Section 8.5 in this report. Compared to some other countries, the outcome of the skill forecast exercises are taken more seriously, with support provided by the Public Employment Service expected to follow the recommendations provided by the forecasts when providing support to the employed and the unemployed. For the support for adult learning provided by the Ministry of Education, no binding use of the outcomes of the forecasts have been established so far (OECD, 2021). Overall, there are ongoing debates to what extent forecast should inform the provision of public support to adult learning (see Section 8.2).

3.3 Recent policy developments on adult learning

Recent developments include two main issues. Firstly, in 2021, the Estonian government issued the Estonian Education Strategy 2021-2035 as the follow up strategy to the Lifelong Learning strategy 2020 (issued in 2014). According to the analysis of the Unesco (UNESCO, 2023), in this new strategic document, the conception of lifelong learning applied put strong emphasis on job-related learning activities and the acquisition of skills needed in the labour market. Regarding learning of adults, difficulties highlighted includes:

- the level of inequality in participation across socio-economic groups, with the achieved increase in participation in adult learning not sufficiently reducing gaps in participation for specific groups;
- the perceived low level labour market relevance of continuing vocational education in particular

Secondly, a stronger role of skill forecast is promoted, provided by OSKA. More details on the ongoing discussion on making the skill needs forecasts binding for steering decisions on providing support for adult learning are discussed in Section 8.5 in this report.

Chapter 4. Role of public funding for adult learning in Estonia

4.1 Introduction – principles and the public share of funding of adult learning

By Spring 2023, no comprehensive estimates have been established on the overall spending on adult learning in Estonia, broken down for the contributions made by the state (including the spending of the PES and the contributions of European Funding Sources), the contributions of the employers and the contributions of the households. However, based on the available evidence, the profile of the funding landscape can be sketched.

The state plays a key role in funding adult learning with public investments made via three main channels. Firstly, by providing access to formal education in schools and universities for adults free of charge. Given the key importance of these organisations in providing adult learning (see 3.2), this needs to be taken as the main form of public investment in adult learning. Secondly, mainly based on ESF funding, non-formal adult learning activities are funded mainly based on a provider-mediated, supply-side approach (see 6.1 for details). The ESF plays a key role as a source for financing adult learning, with about EUR 106 Mio earmarked for related activities for the 2014-2020 period (TOP10 EE Case Study). Thirdly, the Public Employment Service provides adult learning to the unemployed as well as (since 2017) to target groups among the employed (see. 6.2). From what is known, one can assume that the public investments in adult education might be of similar importance to the employers' contributions and might grossly exceed the spending on adult learning from private households.

Enterprises play – as everywhere – an important role in funding job-related non-formal adult learning, both providing internal training (accessible only for their own employees) and by contributing to the cost for external training. Based on CVTS5 (2015) data, the employers contributions to the direct costs (excluding the personnel costs during participation in training) can be estimated roughly between EUR 60 and 80 Mio (based on average costs per employed across enterprises of EUR 126 (Source: Eurostat - trng_cvt_17n2). Overall, enterprises training performance has remained – despite progress made since 2000 – somewhat below the EU average and it certainly is not the main driver behind the strongly expanding participation in adult learning shown in Section 3.1.

Households necessarily contribute to the costs of adult learning even in cases where their payments of fees for courses are considerably low (e.g. by covering travel costs, costs for learning materials, foregone income during participation). However, when focusing on the households' spending on fees for courses within non-formal adult learning exclusively, Estonian households contribute comparatively little as they can rely on learning opportunities either paid by the state or by their employer. Estimates based on AES 2016 data (Molyneux at al. 2020) indicate that less than one in five adults contribute themselves to the fees for non-formal adult learning in Estonia (the same is true for formal adult learning). Total spending of

households' spending for fees related to non-formal adult learning were estimated to be about EUR 24 Mio in 2016.

To summarise, public sources are of key importance for financing adult learning, with the PES and European Union funding lines adding to investments made by the provision of services by organisations belonging to the formal education system. Employers play a significant role in providing funds for adult learning, while households spending for fees are considered as low by comparison, reflecting the strong role of the state in providing adult learning opportunities provided at no or low fees for the users.

4.2 Role of provider-mediated (supply-side) funding for adult learning

Public funds for adult learning are mainly distributed by a variety of provider-mediated (supply-side) funding arrangements. Support can be summarized under two main groups.

Firstly, adults can participate in the formal education and training system free of charge, with formal adult education becoming a main delivery mechanism. Provision includes the lower secondary, upper secondary and higher education sector (Eurydice 2021) ([1]). As shown in 3.2, organisations of formal education and training contribute strongly to the provision of adult learning. Overall, 59% of all measured course hours in adult learning were classified as formal in 2016, according to AES data.

Secondly, adults can participate in (non-formal) courses for free, preselected by the responsible agencies, and presented to adults via dedicated databases, but also via a centralized approach. Details on the related approaches are presented in Section 5.2 and particularly in Section 6.1 and 6.2.

Overall, the provider-mediated (supply-side) funding approach is clearly the main strategy for distributing public funds to support adult learning.

4.3 Participant-mediated (demand-side) funding for adult learning

Public funding for adult learning is provided mainly supply-side funding mechanism, as far as the funding of the provision of adult learning opportunities are concerned, with participant-mediated, demand-side schemes playing a complementary role only. However, public contributions to the living costs during participation of adults in extended learning spells as well as rights of employees for paid and unpaid training leave play an important role (see Section 5.4 for details). Demand-side policies supporting individuals, overall, are much more frequent

[1] 'Estonia has several initiatives led through the Ministry of Education and Research covering basic, general and vocational education and training. Basic education programmes reached 626 participants in 2019/20, vocational education and training support (levels 2 and 3) reached 1,056 participants in the same time period and the general upper secondary programme reached 4,950 participants. General secondary education for adults in the non-stationary form of study is the most significant measure for adults without an upper secondary qualification in Estonia. About one sixth of all upper secondary school students are enrolled in an adult upper secondary school, principally learners who are in work or who have dropped out of full-time education.' (European Commission, 2022).

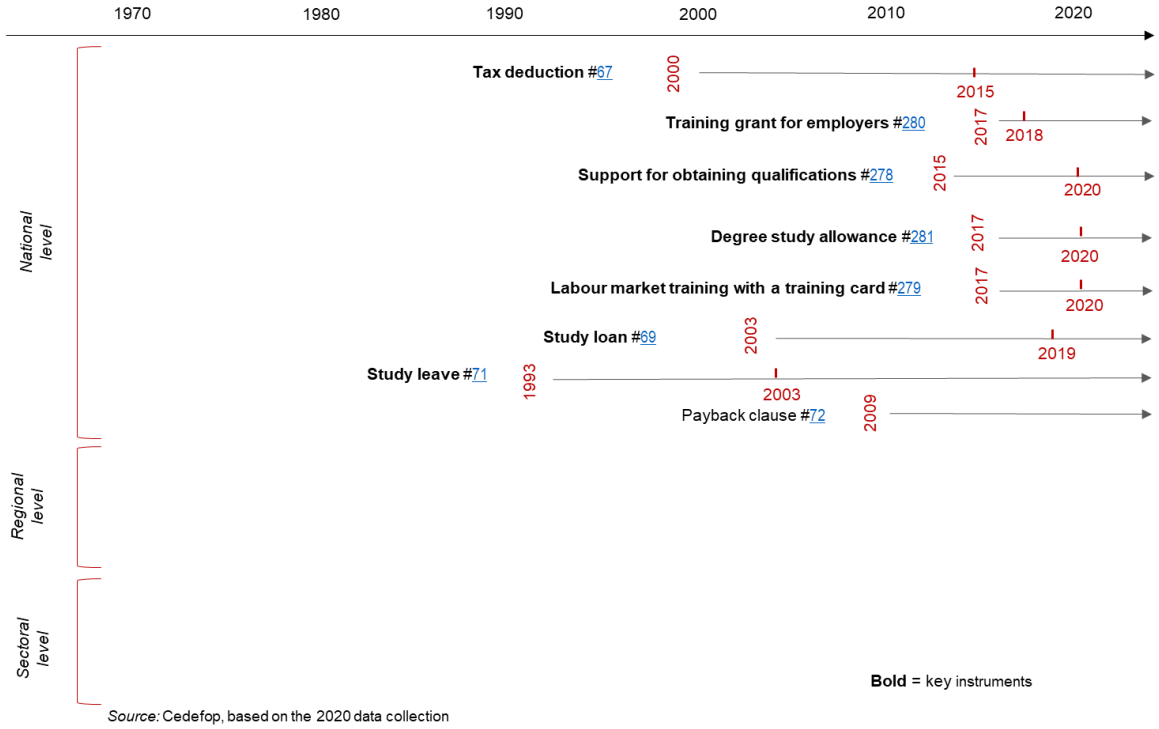
than instruments targeting employers. Figure 1 provides an overview on the evolution of instruments over time, pointing out that most of the demand-side funding instruments for individuals had been introduced only in 2017, so they are a recent addition to the system.

Since 2017, there have been new instruments providing a wage replacement payment (#278) to individuals working towards a qualification for up to 36 months. Moreover, the Labour Market Training with a training card – discussed in detail in Chapter 6.2 – provides a contribution to the costs of preselected course work for up to EUR 2 500 over three years (#279). Adult students are eligible to the degree study allowance (#281), targeting both employed and unemployed persons who have trouble finding work due to insufficient or outdated education or skills or who are at risk of losing their job. Furthermore, adults enrolled in higher education are eligible to student loans (#69) similar to their younger peers.

As discussed in more detail in Chapter 5.5, employees have the right to use a (partly paid/partly unpaid) study leave (#71) (max 30 days per a year) to participate in education and training. Employees can also benefit from a tax deduction of training costs for formal education (#67). However, considerable limitations apply.

Compared to instruments targeting individuals, the schemes targeting enterprises are limited in number and scope. Employers have been supported by training grants since 2017, (#280), which covers training costs, transport costs related to participation in the training and wage costs in the rate of minimum hourly wage for the time the employee participates in the training. Maximum support equals to EUR 1 250 per employee. Moreover, employers can agree with their employees on a payback clause (#72).

Figure 1. Historic evolution of demand-side cofunding instruments and cost-sharing arrangements in Estonia



Source: Based on https://www.cedefop.europa.eu/files/financing-adult-learning-overview-2020-ee.pdf; Numbers refer to the entries in Cedefop's Data base on Financing Adult Learning https://www.cedefop.europa.eu/en/tools/financing-adult-learning-db

To conclude, with a bulk of new instruments introduced in 2017, there had been an attempt to complement a policy framework mainly relying on provider-mediated, supply-side funding arrangements with some participant-mediated, demand-side instruments. However, the budget applied for the new instruments is limited compared to the prolonged schemes using a supply-side approach (see Section 6.2 and 6.3).

4.4 Conclusion – the space left for a novel type of ILA.

Given the strong role of public funding delivered by supply-side strategies and the overall limited role of households in financing adult learning activities by paying participation fees for courses not paid by public sources or the employers, the space left for introducing an Individual Learning Account providing funds to individuals for paying their course fees needs to be considered as limited on short notice.

However, there are strands of provision of adult learning which are offered at a purely market-based, fee-taking basis, which are complementing the range of course work funded by public sources (and are more frequently used by enterprises for their employees than by individuals). In principle, for these segments, an ILA would allow individuals to enter them as well. However, the related forms of provision are currently not regulated or quality assured in any way, so introducing an ILA would also call for the establishment of an encompassing quality assurance approach for any form of provision eligible for the use of ILAs. Another challenge stems from the fact that market-based offers are currently not required to stay within costs limits set by the relevant agencies responsible for funding. This implies that the relevant unit costs for providing adult learning are considered as – at least for an important fraction of the provision – much higher than for offers funded via a ‘supply-side’ funding approach. There is a considerable concern that by adding public support via demand-side strategies, the achieved level of performance in the established approaches would be compromised. The latter might be the case, e.g., when similar activities enjoy higher levels of public support via the ‘demand-side’ ILA channel than by the more strictly governed ‘supply-side’ channels. Related concerns are further explored in Section 8.

Chapter 5. Enablers for taking up adult learning ('Enabling *framework*')

5.1 Introduction

In the following, key aspects of Estonia's adult learning system are explored, following the key elements identified in the ILA Recommendation as the element of the 'enabling framework'.

5.2 Digital Portal for accessing information and support

Estonia is acknowledged as having successfully developed one of the most advanced digital societies. For example, 46.7% of Estonians use Internet voting and 99% of public services are available online (E-estonia, 2019). It is therefore not surprising that in the governance of Estonia's skill system, digitalisation plays an important role.

A key building block at the state level in Estonia's skills system is the Estonian Education Information System (*Eesti hariduse infosüsteem*, EHIS). Since 2004, this database has collected data on students, schools, study materials, examinations, curricula and teaching staff. As schools are required to enter the data directly into the system, the data are deemed reliable. EHIS is a personal-identity-based database, which means that each person is registered with an individual identification number. All events related to studies, for example grades and successfully completed certificates, are stored in EHIS. This individual-based approach allows tracking of each student's development over time. The database is managed by the Ministry of Education and Research. The online platform Educational Eye (HaridusSilm in Estonian) makes aggregated data available to the public.

Individuals in Estonia have free access to a wide range of web-based services and aggregated databases on training and educational opportunities. The main ones are the following: EHIS, JUHAN, List of Free Training Courses, Education Portal.

Continuing Education Information System (JUHAN) is the e-solution for continuing training and a tool to manage the whole training processes both for the learner and the training provider. It facilitates aggregation, transmission, dissemination, processing, accessibility, and storage of information on continuing training, and allows the linking of continuing training to a competency model. The system allows issuing of certificates of attendance and the maintenance of a register of certificates. It facilitates feedback and enables the production of summaries for training accounting purposes.

JUHAN allows interested parties to find and participate in continuing training opportunities, and for continuing training institutions to manage the whole training process, from setting up the training to signing the certificate. The CVET information system aggregates curricula and allows individuals to search between scheduled and on-demand training opportunities and apply for them. Training options are linked to occupational classifications and describe potential target groups. JUHAN is maintained collaboratively by the Education and Youth Board, and the Ministry of Education and Research and is free of charge for the training provider.

The webpage of the Ministry of Education lists free training courses funded by the ESF. It is an aggregated database and allows a detailed search by language, location, field of study, educational establishment, etc. However, the enrolment for a specific course is done on the training provider's web pages.

The Education Portall allows individuals to search and compare different types of formal degree level training (incl. vocational training). It brings together information on all formal education and training institutions. It aggregates specific descriptions of occupational descriptions and labour market sectors, and links them to skills descriptions (provided by OSKA), employment forecasts, and learning opportunities at specific education providers. This online environment is maintained by the Ministry of Education.

Based on the interviews with research participants, some critical reflections can be added. Acknowledging that the existing web-based services facilitate a wide range of services useful for both the learner and the training provider, however, from the end user's perspective, the websites and online-services are rather fragmented. To be able to access the full functionality of the available services scattered across different online platforms, the end-users (or the career guidance personnel) must be very well informed about the different nuances of the types of functions provided by each platform and retrieve each piece of information or functionality from source separately. These web-based platforms assume a high-level proficiency of Estonian language (to understand the professional terminology of the field) and advanced ICT skills to navigate in these environments. Not everyone in Estonia has a basic level of digital literacy. People's perceived digital skills gap, their need for training, and their willingness to participate in training have not been studied and a comprehensive overview of these limitations does not exist. While there is a general move towards better targeting of training needs, the digital skills training needs of the adult population have not been mapped. The target group most in need of improving digital literacy is people who are reluctant to participate in training. Therefore, more work (including information) is needed to reach this target group (*Elukestva õppe strateegia vahehindamine*, 2019).

5.3 Lifelong guidance/ career guidance

Lifelong guidance and career guidance for groups beyond the unemployed have been added at a systemic level recently in Estonia.

Career counselling for adults as a formal service for the unemployed has existed since 2000 (Juske et al. 2004:54). The Employment Agency offered career counselling to understand which labour market training would be suitable for the client. In 2009, organisations, the Employment Agency and Unemployment Insurance Fund were merged and renamed as Estonian Unemployment Insurance Fund, with all previous services and allowances continued under the new umbrella. In 2015, based on a new reform in career services, Estonian Unemployment Insurance Fund started to offer career counselling also for the employed. With the latest reform in career guidance services in 2019, all services including career guidance in schools, were concentrated within Estonian Unemployment Insurance Fund. Different career services are offered for free, including career counselling and career information for all people.

There are sites providing guidance services across Estonia and it is possible to receive counselling via video conferencing software.

In addition, there is career guidance established in vocational schools and in universities, which is free of charge for the users. Moreover, there are also many guidance providers in the private sector. Career counsellors or companies from the private sector offer their services mainly for adults, but their fees are considerably high.

Although much emphasis is given to the accessibility of career guidance across Estonia, the goal that everyone is aware of and is using the related opportunities is not fully met. According to the latest related survey on guidance services (Kallaste et. al. 2021), across socio-economic categories, between 29% and 45% of adults reported a need for career counselling. While 45% of the unemployed have used individual career counselling, only 10% of the employed report the use or relevant services. Among the respondents of the same survey, about 20% proclaimed that they could not identify information about career guidance services. The provision of guidance services for the employed by the organisation responsible for the unemployed had been identified as a potential barrier for the employed to using the services offered. The findings of the study confirm that there is space for further improvement in the provision of educational and career guidance services, the latter also displayed in the Adult Education Survey 2016, with only 4.2% of the 26–64-year-olds reporting involvement in face-to-face guidance (EU27 average: 8.4%). This finding, however, needs to be balanced by above average use of computer-based applications as a source of guidance (8.4% in Estonia compared to 2.8% in the EU27 average – all figures from Eurydice 2021, p. 144-145).

In 2002, The Association of Estonian Career Counsellors was founded. The association is a certified organisation for awarding and recertifying occupational qualifications of career counsellors from 2006 and career information specialists from 2013 (https://kny.ee/). However, the professional standards and underpinning qualifications of the career specialists have remained unregulated. There are no accredited basic training programmes preparing career guidance specialists at the public universities, however, non-formal courses preparing for the occupation exist. Research participants for this case study – in particular representative from educational policy making and representatives from business interest organisations – pointed to a perceived lack in the quality of career guidance provision.

Moreover, there is the observations that career guidance practitioners are bound to overemphasising aspects of employability, however, pay too little attention to an adults' needs beyond the world of gainful work. When guidance practitioners identify a relevant gap in vocational skills, public funding is secured for the related upskilling. However, the range of activities supported remains too narrow and limit the options for reaching out to disadvantaged learners. Where outreach work exists, it is funded on a project-base only, threating the sustainability of approaches developed. Moreover, while it is intended to promote the acquisition of key competencies (e.g. learning to learn) and basic skills, members of the relevant target group find course work providing these skills in isolation not attractive. (*Elukestva õppe strateegia vahehindamine*, 2019).

5.4 Validation of non-formal and informal learning

In Estonia, the required standards for implementing validation of non-formal and informal education have been created, with mainly vocational schools, universities and adult learning centres in charge of validating the skills and competencies incoming learners already have. Approaches towards the acquisition of a full qualification based on the accreditation of prior learning are foreseen, but relevant practices are scarce. Overall, despite frameworks being in place, validation is overall all considered as a less developed component of the adult learning system.

Since 2010, there has been a framework to validate and to consider previous studies and work experience, including non-formal education and informal learning — the VÕTA framework ([2]). Previous experience is defined as previous studies in educational institutions, further training or independent study, knowledge, and skills acquired through work, and other experience. The VÕTA framework can be used to meet the conditions for school admission, for the continuation of studies in progress, to change the study program (also within the institution), and to apply for professional qualifications. At the national level, the VÕTA framework is regulated by the Universities Act, Law on Universities of Applied Sciences, Vocational Education and Training Institutions Act, higher education standard, and Vocational Education and Training Act. In addition, educational institutions and organisations providing professional qualification assessments have established their own regulations for applying the VÕTA framework. In the 2018/2019 academic year almost 4 500 students made use of the VÕTA validation framework. Although research participants reported VÕTA to be a good starting point for validation, they stressed out that further development would be required. Representatives of education system and actors in the field of employment say that the rules and principles of VÕTA need better explorations.

In the renewed legal framework of TäKS ([3]), the responsibility for the validation and the quality of the learning outcomes of non-formal education is bestowed upon the non-formal education providers themselves. There is a lack of data on the actual practice of measurement of outcomes of non-formal learning, as well as a lack of a national holistic definition and an overview of the terms. This leads to a lack of common understanding on the role of validation in the adult learning sector. It is difficult to assess what is learned in non-formal education, which leads to a weak link between working life and the labour market, e.g. the VÕTA measure is not utilised to its potential (ICF, Praxis, TLÜ & Civitta, 2022). Non-formal learning has been ascribed a variety of societal roles, the necessity and fulfilment of which are also subject to different perceptions (Põlda et al, 2021).

Formal and non-formal learning are not sufficiently integrated in Estonia (ICF, Praxis, TLÜ & Civitta, 2022). One potential difficulty in integrating non-formal and formal learning is that the field of non-formal learning is diverse, leading up to quite different ways of usage of the term in Estonia, but this diversity is largely undocumented and non-conceptionalised (Karu et al., 2019). From the interviews, a representative from the education field points out that formal validation of qualifications against a professional yet mainly academic standard is becoming less important for employers, and they now place more value on practical skills, the latter

[2] Stands for Varasemate Õpingute ja Töökogemuse Arvestamine/ Recognition of Prior Learning and Work Experience VÕTA https://haridusportaal.edu.ee/artiklid/võta

[3] Täiskasvanute koolituse seadus/ Adult Education Act

playing a minor role in the accreditation procedures. However, formal validation systems still serve a practical purpose in quantifying educational success.

5.5 Training leave and contributions to subsistence costs/ wage replacement

Employees enjoy a right for study leave supporting both the participation in formal education and in non-formal adult learning.

The right to study leave is established by the Employment Contracts Act (EA) ([4]), which give employees the right for study leave under the conditions and in accordance with the procedure laid down in the Adult Education Act (TäKS) ([5]). The Adult Education Act (TäKS) first came into force in Estonia in 1993. It established the right for every person to access opportunities for lifelong learning and continuous self-improvement throughout their life and instill obligations of the state, including local authorities to support adult learning. Moreover, employers were obliged to take part in the provision of adult learning. Finally, the act also regulated the terms for paid study leave to employed adult learners.

Study leave is available to part-time or full-time employees with a formal employment contract. Eligibility to the study leave is not bound to any specific form of study — an individual participating in any form (e.g. full-time, part-time, distance) of degree study at any level of education (e.g. basic, secondary, or higher education, vocational training etc.) is entitled to provision of the study leave. Study leave needs to be granted for 30 days per calendar year for the purpose of attending degree study or further professional training. Moreover, individuals are also entitled to an additional 15 calendar days one time for the purpose of completing a level of education or for taking entrance examinations. Individuals can request the provision of study leave at any time throughout the calendar year. An employee is entitled to take the maximum duration of study leave either at once or split up in shorter periods, and they have the right to take study leave with more than one employer (if they have more than one employer).

During the period of study leave granted for the purpose of attending further training for professional development or continuing degree study, the employer is mandated to pay the employee an average daily rate of salary for the 20 calendar days (paid training leave component), hence 10 days of the total 30 days of study leave are unpaid leave. If the employee wants to engage in training that is neither work-related (the decision of whether training is work-related or not is at the discretion of the employer) nor leading to a degree, they are still entitled to take 30 calendar days of study leave for non-work-related further education, however, than the whole of 30 days are unpaid. Employees taking entrance exams to degree study programs are also entitled to study leave, however, unpaid leave only.

Securing access to paid study leave has been a significant part of Estonia's labour legislation over the last three decades. Thereby, training leave has become an accepted component of the Estonian study and work culture. The lack of political contestation and the absence of major reforms since 1993 could be interpreted as a sign that study leave is broadly

[4]Employment Contracts Act https://www.riigiteataja.ee/en/eli/ee/505052017002/consolide/current
[5] Adult Education Act https://www.riigiteataja.ee/en/eli/523052019003/consolide

perceived as an effective policy meeting the interest of the learners and their employers. However, it is an expensive measure with the cost borne by the employers. This could be seen as a weakness as it creates a burden for businesses, particularly small and medium-sized enterprises for whom temporarily losing an employee might result in major disruptions. Interviewees within our sample representing business interest organisations confirmed the assessment that study leave provision can be challenging for SMEs as they have more difficulties to fill the gap during the employees' absence. They reported on the practice of agreeing on a middle ground where employees continue some of their work responsibilities despite being formally on leave. A representative from the education policy system points out that the duration of paid study leave is too short to effectively support the completion of formal programs.

Nevertheless, Estonia's long history of implementing paid study leave suggests that it has proven to be a valuable investment in human capital development. Overall, the paid study leave measure has been a crucial part of Estonia's labour market for an extended period. While it may have certain limitations, there are reasons to believe that it is an effective tool for promoting learning and development among employees. In stark contrast to the overall acceptance of the study leave, no statistical data on the use of study leaves were collected and no formal evaluation of the effects of the study leave arrangements are available.

Finally, the availability of short paid training leave that supports the completion of long stretches of formal part-time education should not obscure the fact that Estonia currently lacks a scheme providing contributions to subsistence costs or wage replacement payments for extended periods of full-time education.

5.6 Quality Assurance Framework for adult learning provision

Since 2015 the quality assurance of adult training has been regulated by the legal framework of the Adult Learners Act (TäKS[6]) (versions 2015 & 2019) and the accompanying regulation 'Standard for continuing education' ([7]). According to §3 of TäKS, the operator of the continuing training institution shall establish the basis for the organisation of continuing training and the basis for ensuring the quality of the continuing education. This is expected to be replaced with an updated law in Spring 2024 ([8]). It is expected that in the updated legal framework, the organisations providing training would be obliged to allow a stricter quality inspection, particularly for companies who have submitted a business activity report. The latter is a prerequisite for the organisation to be a recipient of funding from the Unemployment Insurance Fund as well as – insofar fees are required – a condition for the participants to receive an income tax rebate in line with the fees paid.

[6] The draft legislation on updating TäKS had been finally issued by the 4th of July 2024. Adult educators have become obliged to provide evidence for the competence in teaching in the adult learning sector. Adult education providers have been required to develop and to showcase their approach to quality management. A transition period has been granted up to 1st of January 2026 to comply with the new regulations.

[7] Täiendkoolituse standard 2017 https://www.riigiteataja.ee/redaktsioonide_vordlus.html?grupiId=1030034&vasakAktId=126062015009&paremAktId=111112016002

[8])

Regarding the quality of online training, in 2008 the quality of online learning working group of the Education Information Technology Foundation (HITSA) developed a framework for a quality label for online courses/training ([9]). From 2020, the Estonian Education Quality Agency (HAKA) coordinates the award of the quality label.

In the (by the time of the writing) latest version of TäKS (2022), §3 states that the assessment of the quality of continuing training consists of a self-assessment by the continuing training institution and an assessment by independent experts of the adequacy of the resources needed to deliver the training in the learning unit, the adequacy of the requirements of the adult educators and the compliance of the curricula with the continuing training standard. The conditions and procedures for the assessment of the quality of continuing training shall be established by the Minister responsible for the field by regulation, and the body responsible for the assessment shall be designated by regulation. Decisions of the quality evaluation processes are made public in the Estonian Education Information System (EHIS).

Since 2018, the Estonian Quality Agency for Education (HAKA) ([10]) has also been assessing the quality of continuing education in Estonia. HAKA assesses the curricula of the continuing education institutions and learning development activities based on curricula. HAKA assesses whether and how the curricula, teaching, and learning development activities offered in the selected curriculum group meet the following conditions: the principles of quality of continuing training as defined in the Adult Education Act (TäKS) and the Continuing Training Standard; the national and international standards and development trends; the quality criteria set for evaluation. The evaluation will enable institutions to obtain a label of quality by HAKA. The quality label is valid for the same length of time as a positive evaluation, i.e. five years ([11]). Furthermore, between 2022 and 2023, HAKA had planned to carry out the quality assessment of learning modules provided by the partners of the Estonian Unemployment Insurance Fund's Training Card (see Section 6.2).

Adult education providers (including private tutors) who are privately funded by learners who pay for their own training, are not subject to any of these quality assessment processes.

Despite of the measures taken the question whether formal and non-formal provision of adult learning is meeting the required quality standards remain a key concern for Estonian adult learning policy making and has been addressed when discussing strategies for future developments (see Section 8).

5.7 Outreach and awareness raising activities.

Estonia registers some long-standing initiatives concerning outreach and awareness raising activities in the field of adult learning.

The outreach and awareness raising activities of most topics related to promoting adult learning in Estonia have been assigned to the Association of Estonian Adult Educators (ANDRAS). Since 2013 ANDRAS is an official and recognized partner organisation of the Ministry of Education and Research and oversee coordinating an outreach project called

[9] https://haka.ee/e-kursuse-kvaliteedimark/

[10] Eesti Hariduse Kvaliteedi Agentuur https://haka.ee/en/organization/

[11] TÄIENDUSKOOLITUSASUTUSE ÕPPEKAVARÜHMA KVALITEEDI HINDAMISE JUHEND https://haka.ee/wp-content/uploads/Taienduskoolituse-hindamisjuhend_2023-1.pdf

Implementation of the European Agenda for Adult Learning (AGENDA). The project raises general awareness about lifelong learning and carries out various activities and campaigns, including a broadly campaigned Adult Learners Week every year in October. Target group of the project involves people with low levels of education (without secondary education) and without professional education, as well as the respective group of the non-Estonian-speaking population. The project is co-funded by the Erasmus+ Programme. In the period of 2015–2018 the Ministry of Education and Research implemented a project 'Promoting adult learning and expanding the range of learning opportunities' funded by the European Social Fund ([12]). They are doing campaign videos on television and websites as well as posters in the cities and newspapers. To promote lifelong learning ANDRAS has in every district a volunteer (with the job title adult education coordinator), who organises different events, e.g. adult learning week. ANDRAS also successfully cooperates with other public partners, e.g. with the network of libraries, with learner ambassadors (in adult upper secondary schools and vocational schools, a volunteer supporting other learners) and with Kodukant, the Estonian Village Movement to raise awareness about the importance of lifelong learning.

In addition, the Estonian Unemployment Insurance Fund has implemented specific campaigns in support of subsequent new services. Also, for the 'work and study' services they have had several campaigns: in 2018 two, in 2019 three and also in 2021 three campaigns (Töötust ennetavad teenused 2022). In 2023, PES launched a renewed career portal minukarjaar.ee and supported this launch by campaigns through different channels. They receive coverage on television (both in Estonian and Russian, including channels like ETV+), have posters displayed in cities, and banners on internet sites. PES utilizes various channels and platforms to raise awareness about the different services they offer.

Despite the efforts reported, there is still the concern that the awareness raising and outreach activities are insufficient to reach out to groups of adults with the least probability to engage with organised learning. Among the experts and stakeholder interviewed, representatives of organised business, as well as stakeholders in the employment, and education policy field all problematize that members of specific target groups remain unaware of the learning possibilities at their disposal. The need for developing effective outreach strategies is therefore highlighted despite the activities taken.

[12] https://www.andras.ee/en/projects-0

Chapter 6. Exploration of the implementation of public funding instruments against the backdrop of the goals set by the ILA recommendation.

The EU Council Recommendation on ILAs understands individual learning accounts as a specific form of an individual training entitlement which should contribute to making the individual right for deliberately choosing and accessing adult learning at any point of time across the life course a reality, irrespective to an adults' socio-economic background (European Council, 2022). The Council Recommendation acknowledges that any new instrument should 'complement other measures already in place' and should be implemented by Member States 'in accordance with their national needs and circumstances'. This implies that functions of an ILA as defined in the Council Recommendation can also be fulfilled by pre-existing instruments alternative to the specific set-up proposed in the Council Recommendation ([13]).

Consequently, in this section, we come back in more detail to the aforementioned two most important frameworks of public funding for adult learning, namely the ESF backed supply-side funded courses (Section 6.1) offered free of charge and the demand-side scheme Labour Market Training with a Training Card (Section 6.2), both fulfilling some functions also covered by ILAs in line with the Recommendation. Both frameworks are also intertwined with components of an enabling framework, which are discussed in further detail in the two sections. However, one should bear in mind that further education activities offered by formal education institutions, the universities in particular, are provided to a substantial degree for free or at comparably low fees.

Figure 2 provides a map on the role of public funding for the provision of non-formal adult learning. As discussed in Section 5.2, all course offers are represented in the JUHAN portal, covering 90 000+ courses (2022: 95 415 2021: 90 891 ([14])) and – as established by the monitoring – with 422 884 registered participation cases in 2022 (up from 415 000 in 2019 (OECD, 2021)). A significant share of all courses – about one quarter – is provided for free and funded via supply-side funding, reaching about 90 000 to 100 000 participants via this mechanism. As already mentioned, users can find the free courses in the general database or can refer to a dedicated database covering only fee-free courses under the ESF-funded 'Free course' scheme. An overall much smaller, yet significant part of all courses, is funded by the PES, mainly for the unemployed. However since 2017, also selected groups among the employed have access to these courses (Labour market training with a Training Card). Here, the PES select providers and courses, however, the supported adults receive a budget to be used for paying for the training offers selected from the database of eligible offers. Course work accessible via the Training Card – both for the unemployed and the employed – is organised in a stand-alone data basis ([15]) but also featured in the JUHAN database.

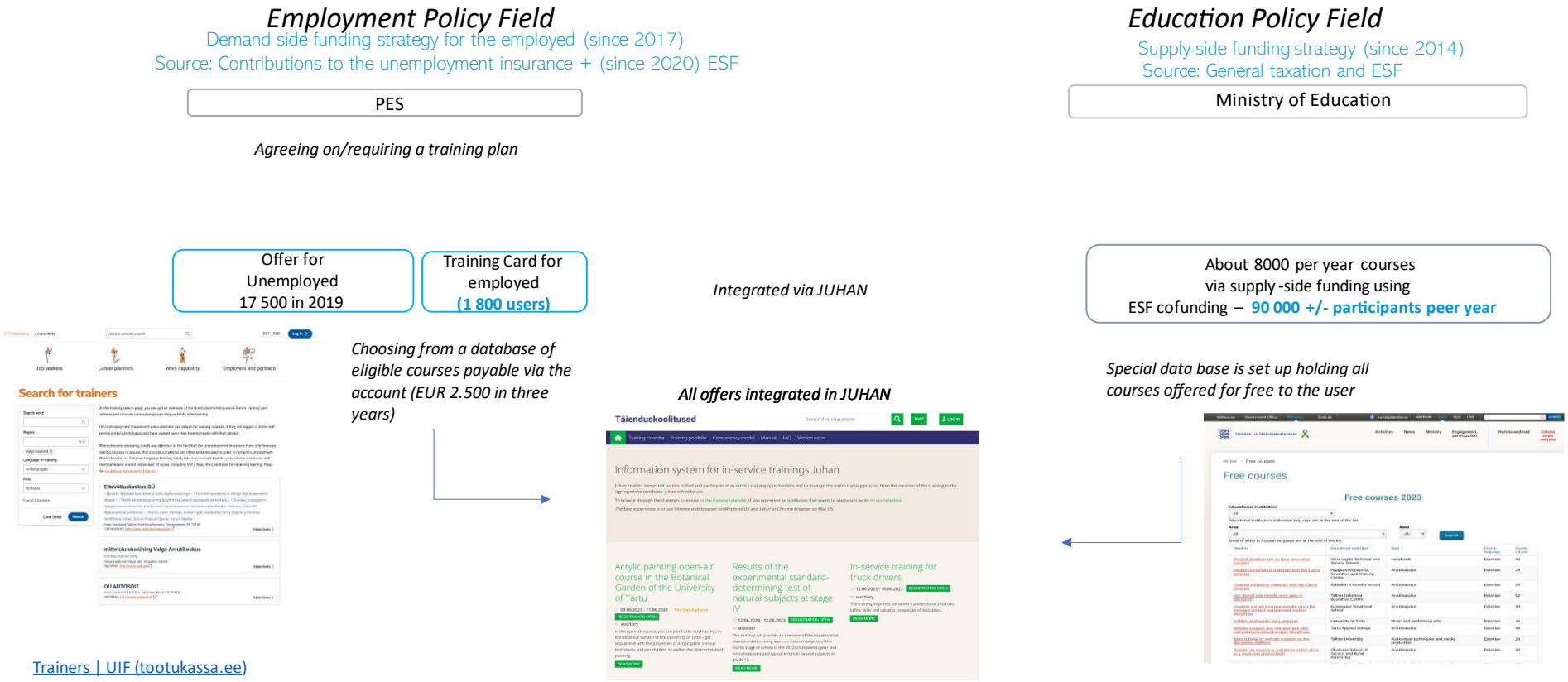
13 An 'individual learning account is a delivery mode of individual training entitlements. It is a personal account that allows individuals to accumulate and preserve their entitlements over time' (European Commission, 2021)

14 All data updated based on TÄIENDUSKOOLITUSED 2022. AASTAL. https://www.hm.ee/sites/default/files/documents/2023-11/Tegevusnaitajad_2022.pdf

15 https://www.tootukassa.ee/et/koolitajad

Quantitatively speaking, this user-mediated (demand-side) funding approach is much smaller than the supply-side route, however, the sources earmarked for each person (2020: EUR 2 500 over the multiple year period) are quite substantial (paying for e.g. 10 or more courses). More details about these two approaches of providing public funding for adult learning are reported in Section 6.1 and 6.2.

Figure 4. The role of provider-mediated/ user-mediated public funding for non-formal adult learning



The adult user can see all courses in JUHAN and can register – beyond fee-paying courses and courses provided free by organisations of the formal system - both courses free of charge or in courses accessible via the Training Card; The data base includes 90 000+ courses; in 2022, 422,884 participation cases were registered.

1

Source: Own development

Section 6.3 touches a marginalised but important topic, namely the regional disparities in service provision in adult learning. Given the high degree of centralisation of the Estonian Adult learning system and the role of Tallinn and some other cities as hubs for adult learning, the topic of regional disparities typically attract little attention, however, is reviewed based on examples (Ida-Virumaa in the North-Eastern part of Estonia; and Hiiumaa, a remote island in the Western part of Estonia) in the respective section. It is important that the local level lacks policy instruments of its own, so no particular eco systems can emerge around sets of local policies as observed in countries with a decentralized approach in adult learning policy making.

6.1 Frameworks for provider-mediated (supply-side) funded CVET/adult learning

Since 2014, the Ministry of Education has used ESF funding to pay for the provision of adult learning courses free of charge for the participants. The framework has been continued in the ESF 2021-2027 funding period ([16]).

The goals set for ESF-funded CVET programs and adult learning courses in Estonia for the funding period 2014-20 (implemented between 2015 and 2023) were multi-faceted. One of the primary objectives of ESF-funded CVET and adult learning has been to promote adult learning and widen learning opportunities for more target groups. The quantitative target set for this funding period was to reach about 86 500 adults (6.6% of the population) and allow them to successfully complete a chosen program and receive a certificate of completion. Adult learning opportunities were free of charge for the participants, aimed not only at upskilling and reskilling the adult population but also creating sustainable collaborative models that would enable individuals with lower levels of education to access further learning opportunities later, with the funded programs working as a bridge towards the established formal programmes. Moreover, the goals included raising awareness about learning opportunities and fostering a greater willingness to learn among the adult population in general. The plan also sought to enhance the quality of training provision and the quality assurance systems of the providing institutions, ensuring that they meet rigorous standards. ESF-funded learning opportunities are offered by a variety of educational institutions, including non-stationary general education institutions, vocational training institutions, higher education institutions, and adult education providers. Additionally, the objectives aimed at increasing awareness of opportunities for credit transfer based on prior learning and work experience (VÕTA), thus promoting the use of VÕTA as a valuable pathway to education and skills development. In 2023, the courses were focused on developing digital skills.

In Estonia, the ESF-funded CVET system is steered mainly by the Ministry of Education and Science. The selection of eligible courses is informed by the OSKA skill forecasting approach, which assesses the country's labour market needs and identifies skill gaps and

[16] 1. 'It would be of key importance to provide statistics on the funding applied (should be available in the ESF reporting)' sources to consider
https://ec.europa.eu/european-social-fund-plus/en/support-your-country/esf-estonia
https://www.fin.ee/riigi-rahandus-ja-maksud/valistoetused
https://www.rtk.ee/toetuste-ulevaated-ja-oigusaktid/euroopa-liidu-valisvahendid/rakendusperiood-2021-2027
https://ec.europa.eu/employment_social/esf/docs/et_country_profile_et.pdf (old, but shows discourse/priorities)
https://ec.europa.eu/esf/main.jsp?catId=377 – also outdated, last refreshed 2021

priorities and informs the decision processes within the Ministry of Education and Science. OSKA's data-driven analysis guides the decision-making process for determining which courses and training programs should receive funding. Eligible courses are typically offered by a range of educational institutions, including non-stationary general education institutions, vocational training institutions, higher education institutions, and adult education providers. These institutions play a crucial role in designing and delivering training programs that align with the identified skill demands and priorities. The public tender system is a key mechanism for allocating ESF funds to eligible training providers. Through a competitive process, educational institutions and training providers can submit proposals for courses and programs that address the identified skill gaps, labour market needs, geographical and target group coverage. These proposals are then evaluated based on their alignment with the OSKA forecasts and the specific objectives of the ESF-funded initiatives. Participation in the public tender system is typically open to a wide range of educational and training providers, however, training providers who want to offer training under this program are subjected to substantially higher levels of quality control, compared to the providers offering courses on the free market.

From a learner's perspective, accessing suitable CVET courses in Estonia is a straightforward process with two main avenues. Firstly, individuals can visit the Ministry of Education and Science's website, where they will find an extensive and searchable database listing available and upcoming courses. This user-friendly database allows prospective learners to refine their search according to parameters such as the training provider, teaching language, and course topic. Detailed curriculum descriptions and registration conditions are readily available, often linking directly to the training providers' websites for further information. Importantly, these curriculums are standardized, ensuring consistency and quality across the educational landscape. Alternatively, potential learners can choose to search for the courses in the JUHAN database or explore courses directly on the training providers' websites.

The evaluation of educational courses funded by the ESF and those offered in the open market highlights several important considerations related to quality, depth, and content range. Firstly, ESF-funded courses, which are free for participants, often prioritize specific social and economic objectives, such as improving employability or addressing skill gaps in priority sectors. Consequently, these courses may have a strong emphasis on meeting these objectives, ensuring that participants acquire the skills and knowledge needed for their target industries. However, there might be questions regarding the depth of the content provided by these courses. Due to their focus on specific outcomes, they may not always offer in-depth explorations of more complex skillsets and subjects. This can be seen as both a strength and a limitation, depending on the learner's goals and needs. On the other hand, courses available in the open market, which learners typically pay for, often offer a broader range of topics and greater flexibility in terms of content. These courses cater to a diverse set of interests and skill development needs, allowing participants to explore a wider array of subjects. However, the quality of these courses can vary significantly, as they are subject to market competition and may not always adhere to the same rigorous standards ESF-funded courses must promise to comply within public procurement. Furthermore, it should be emphasized (see Section 3.2) that formal education institutions and in particular universities are by far the most significant providers of adult learning, further complementing available non-formal education offers.

The approach to the provision of free courses will be continued in the following ESF funding period. Moreover, During the 2021-2027 ESF funding period in Estonia, several key initiatives have been planned to enhance education and skill development. These measures are designed to align with the changing needs of the labour market and the goals of students. They include guiding students' educational choices in vocational and higher education through programs like the Technological Program (also known as the Engineering Academy). The funding also supports the development of vocational and higher education programs to meet labour market demands, exemplified by the PRÕM+ program. Funding also supports the improvement of IT education and digital skills. Additionally, efforts to enhance higher education quality, promote internationalisation, and support doctoral programs are integral components of these measures. For the 2021-2027 period, a substantial allocation of about EUR 87 Mio has been designated to support these initiatives, with the aim of strengthening Estonia's education and training systems.

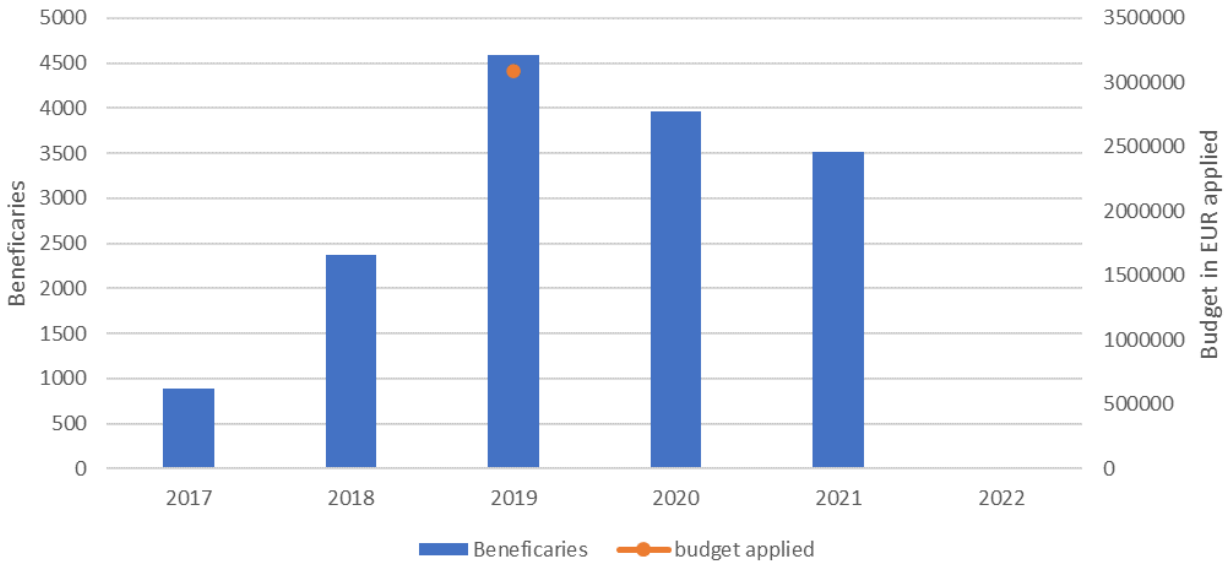
6.2 Estonian Labour Market Training with a Training Card (Tööturukoolitus koolituskaardiga)

The section introduces into the scheme Labour Market Training with a Training Card for the employed (*Tööturukoolitus koolituskaardiga*), with targeted employed (those without upper secondary qualification or the low wage earners) receiving a budget which can be used for educational offers selected from a database of over a period of three years.

In 2017, the decision has been made to expand the group of eligible (unemployed) adults receiving support for CVET by the PES to selected groups of employed as well. By this decision, Labour Market Training with a Training Card has become one strand of support available for the employed, who can use the same overall framework as the unemployed. Support for training opportunities via this scheme complements the provision of adult learning opportunities free of charge run by the Ministry of Education, discussed in detail in 5.1.

For the comparatively small scheme, a (also changing) set of criteria is used for defining eligibility. Employed from 16 till retirement can apply in case they lack a vocational qualification, belong to the group of low wage earners (threshold in 2019: EUR 16 764 per year), are older than 50, or face health limitations threatening the continuation of their employment. Beyond some further criteria for inclusion, limited labour market prospect due to a (too) low level of capacity to communicate in Estonian forms a particular important one, with support for language courses – mainly for members of the Russian speaking minorities – being an important aspect of the scheme. Individuals agree with the PES on an educational plan including course work, for which a budget of up to EUR 2 500 can be used within up to three years. Only courses and providers listed in a dedicated data base are eligible for co-funding. Money is directly transferred to the training provider in case the required attendance rate has been met. The scheme had been funded by national PES means in the beginning, had been co-funded by the ESF for one period and is continued based on national funding.

Figure 3. Evolution of Labour market training with a training card for employed (Tööturukoolitus koolituskaardiga töötavatele) – 2017 onwards



Source: Based on Töötust ennetavad teenused 2022

From May 2017-October 2021 approximately 11 000 employed people have used the Training Card (Töötust ennetavad teenused 2022).

The evolution of the scheme can be traced back to a trade unions initiative aiming at developing 'work and study' services for the employed, with the Training Card as one measure among others. Trade unions first vision referred to the idea that every person should have an opportunity to participate in further education at least once in a 5-year period, thereby applying the philosophy of an individual learning account, where everyone can rely on the availability of support for training according to defined rules. However, when designing the measure, it had become clear that the involved costs for a general entitlement would go beyond the budget lines which could realistically be made available by the time of the implementation. Therefore, the group of eligible employees had been strongly limited.

For accessing the scheme, clients need to see a career counsellor of the Estonian Unemployment Insurance Fund (PES), who assess the training need and check a client's eligibility of support. The menu of eligible training opportunities, as offered in the dedicated database, is informed by the labour market intelligence provided by OSKA studies and is therefore thought as being in line with the anticipated labour market needs. Only people with health problems can choose from a wider variety of training offers ([17]). For each client there is a maximum amount of EUR 2 500 available for covering of training fees over three years. The process of gaining access to the support is modelled against the backdrop of the applied process for the unemployed, the later reaching, however, much more clients and including more mandatory elements.

By Spring 2023, no big reforms had been planned for the instrument with only minor changes having been made. Recent changes include the exclusion from eligibility of certain economic subsectors (hairdressing, cosmetology etc.) and of certain types of activities seen

[17] People with health issues (disabilities, reduced work capacity) have a wider selection of training (not limited by OSKA studies), however still 54% of the people using this service have chosen specific labour market training (Töötust ennetavad teenused 2022).

as mainly providing support for self-development. Representative of PES said that PES regularly assess target groups and their training needs in relation to the labour market needs, and minor adaptations will be constantly made to achieve a satisfactory fit between skills provided and skills needed. In the long-term view, Training with a Training Card has shown to affect the chance to start employment and also get better income (Töötust ennetavad teenused 2022).

6.3 A marginalised topic – regional disparities in service provision in a highly centralised adult learning system

The topic of regional disparities is less reflected in overall policy discourse on adult learning provision in Estonia. This low level of attention for regional differences in adult learning provision reflects several particularities. Estonia is a small and highly centralized country. Legal competencies for supporting adult learning lie almost exclusively with the central state and are not devolved, for example, to the municipal level. The population is concentrated within the larger cities, Tallinn in particular. The capital together with other 14 cities with more than 10 000 inhabitants concentrated 60% of Estonia's population in 2021. Tallinn itself is comparatively easy to reach from most places within Estonia, with practically the whole country with a 200-kilometer distance from the capital. Nevertheless, there are regional differences with some regional entities facing significant disadvantages when it comes to adult learning. In the following, two examples for regions within specific difficulties are presented.

There are a few areas within Estonia, which are at a disadvantage when it comes to easy access so Estonia's bigger cities and their adult learning provisions. In the following, one example is discussed in more detail. Hiiumaa island is located in the Baltic Sea and is the second largest island in Estonia with a population of about 11 000, making up for about 0.7% of Estonia's total population (2022). Despite efforts to increase participation in adult learning through support services for transportation and childcare, participation figures are still below Estonia's average, with lower participation among older individuals, mothers with small children, and those living in dispersed settlements. The limited availability of training providers in these areas also contributes to a limited range of training offers, which limits potential participation. However, successful cooperation initiatives have been established between local organisations and regional policy documents put emphasis on further extension of adult learning provision. New challenges often appear when decisions are made at the national level which have particularly negative consequences for more isolated regions. For example, changes in the PES funding approaches for providing funding to individuals for choosing courses on their own further limits the accessible range of support adult learning opportunities. Overall, there is a lack of standardized approaches in the cooperation between local and national level institutions, so that decisions need to be made on an ad hoc basis. On a more general basis, the overall funding arrangements in Estonia, where education providers compete for bids in public procurement, puts regions with a small population at a disadvantage, as for education providers, it is economically much easier to deliver adult learning services in cities than in rural areas.

Moreover, border regions have much higher proportions of adults belonging to the Russian speaking minorities. This implies differences in the importance of delivering CVET both in Estonian and Russian language. An example in this regard is Ida-Virumaa, an industrial region in the eastern part of Estonia, which shares a land border with the Russian Federation. The population of Ida-Virumaa is about 130 000 and consequently makes up for about 11% of Estonia's total population (2022). Historically the region has been heavily dependent on the oil shale industry and related businesses, and therefore has a significant Russian-speaking minority population, which comprises about 40% of the region's total population. There is a notable discrepancy between Estonian speakers and Russian speakers in terms of the availability of training opportunities, with fewer options offered in Russian. Moreover, marketing activities for adult learning are typically not targeted towards Russian speakers. Interviewed experts emphasised that this could put Russian speaking adults in a disadvantage within learning opportunities funded via the ESF, in particular those that have not acquired citizenship (for which command of the Estonian language is a prerequisite). Experts have stressed a need for a more comprehensive dissemination of information about learning opportunities made available by the PES and its services targeting the working population, rather than just those who are unemployed. Despite these challenges, one of the strengths of this area is the accessibility of training centres in the urban centres of the Ida-Virumaa region and good public transportation connections across the region.

Overall, the questions related to the regional disparities in support for adult learning remain a topic requiring further examination in Estonia.

Chapter 7. Country level assessment against the analytical framework on ILAs

Summarising the strengths and weaknesses of the Estonian adult learning system against the backdrop of the ILA recommendation shows that a variety of support instruments are already in place that partially contribute to the goals of the Council Recommendation, albeit by a substantially different institutional set-up than proposed. In Estonia, the state plays a key role in the provision of adult learning, the latter mediated by the outstanding large role of organisations of the public formal education system both as the providers of formal and non-formal adult learning. The state therefore relies mainly on provider-mediated supply side strategies for providing financial support for adult learning. Recent elements added – as the initiative to provide free training opportunities based on ESF funding – complement the given system with a supply-side funding approach. While the reported 'Training with a Training Card' is an example for a participant-mediated, demand-side instrument, nevertheless, it takes part in the established framework with the PES predefining the 'menu' from which adults can choose based on their 'budget'. Overall, the recent initiatives do not alter the overall dominating funding patterns routed in supply side funding.

Estonia's tax-sourced educational budget provides the backbone of public funding in adult learning, grossly extended by funding from the ESF, based on a governmental decision to use a substantial share of the available funding for education, and adult learning. Funds from the unemployment insurance complement the menu, creating a by comparison stable arrangement. For offers implemented by supply-side funding arrangements, everyone in need of a particular type of learning opportunity is eligible, so this comes somewhat close to universal access. The tradition of providing formal education mainly free of charge for adult learners leaves less demand for demand-side funding arrangements covering high fees. Recent policies added mainly deal with expanding the provision of comparatively short learning activities (typically much below the threshold of formal adult learning, that is half a year of full-time education). Access to the 'Training with a Training Card' is limited to specific target groups. Overall, public decisions made on what offers should be selected for demand side funding determine what is accessible to the individual, with decisions deliberately bound to the outcomes of skill demand forecasting exercises (the OSKA approach). This might limit the range of opportunities, forcing adults to purchase services on the market for anything they need or are interested in but that is not included in the system of public provision.

The overall week position of the social partners in the decision-making for the explored schemes reflect their overall week position within Estonia's politics. The perceived lack of attunement between the needs of employers and the labour market and the provision of skills and qualifications by the education system, including the adult learning system, can be traced back to a limitation of interest aggregation and the articulation of the Social Partners in steering decision making on education and adult learning policies. Improving the alignment of educational offers and employers (and employees) needs remains thereby a key issue in adult learning policies.

Regarding the enabling framework, Estonia has an integrated and quite effective portal solution displaying adult learning opportunities available and allowing for entering the courses.

It is effective in connecting courses offered for free and adults searching for opportunities. In addition to the integrated portal, the two policies investigated are both supported by a dedicated stand-alone database bases supporting adults' choice.

The provision of guidance beyond the group of the unemployed had been extended to all groups of adults, nevertheless, there seems to be a gap in the provision of various forms of counselling and services provided by the PES which are most likely not in the position to meet the whole range of needs in place. The two measures under review (supply-side funding for adult learning and Labout market training with a training card) are both not linked to specific guidance offers, however, access to the 'Training with a training card' even requests the consultation with a PES counsellor.

Regarding 'making time' for adult learning by taking time off gainful work, the situation is mixed. Overall, there is not a generous tool providing contributions to the subsistence costs during extended spells of education. By 2017, the introduced degree study allowance provides contributions to the subsistence cost (#71) ([18]) a least for an overall restricted group of adults for a predefined number of (longer) adult learning program. The lack of support for the living costs during extended spells of education is somewhat eased by the rather generous access to paid training leave (up to 20 days), which clearly facilitates not only entering short spells of adult learning but facilitates the completion of long spells of education as well, with the combination of (some) gainful work and participation in formal education being frequent pattern.

Validation is overall well developed for earning credits within formal adult learning, at higher education level in particular. There is much room for extension when it comes to using validation for earning a vocational qualification. The two schemes studied are not linked in a particular way to approaches for validation.

The quality assurance system relies mainly on the certification of organisation participating in calls for service provision. Given the large role of formal education organisation in adult learning, established professional standards for the staff in these organisations also support the quality of service in adult learning provision. Both funding schemes studied particularly rely on the overall approach for quality assurance (see Section 5.7) However, a perceived lack of quality, or even more, of relevance of adult learning provision for the needs of the labour market remains a key concern across broad groups of stakeholders, the latter also reflected in by the research participants of this project. Moreover, given that fee-based provision is currently outside any quality assurance approach, there is even more concern to provide individual's a budget to buy service on the market within the current system, relying so strongly on organisations receiving public support in exchange to the promise to meet quality standards.

Overall, when the main patterns of providing public financial contributions are considered, with opportunities for adult learning mainly offered free of charge for the users, the criteria for describing approaches selected in line with the ILA recommendation are often not well suited or applicable. For example, with courses provided for free, there is no need for accumulation of entitlements, and there is no space for making any entitlement portable, as free opportunities can be used independently from any employer. Against this backdrop, the introduction of an

[18] #[number] refers to https://www.cedefop.europa.eu/en/tools/financing-adult-learning-db

ILA in line with the Recommendation would mark either a break with the current arrangements or would work only in a supplementary segment, however, which is regarded as outside of the reach of the established mechanism for quality assurance. Patterns where individuals pay the full costs for their adult learning themselves are not widespread with adults more accustomed to choosing from a menu of opportunities accessible for free or at low fees.

In sum, an Individual learning account offers no ready-made fit to the overall structures established for Estonian adult learning system. There might be possibilities to develop specific ILA arrangements, which would have good fit with the current situation (e.g by expanding the available courses provided for free, however, combine this with some limitations for using courses work in line with the idea of having a particular 'budget' available within a given time frame). However, there are other main concerns as highlighted by consulted experts, including the (a) observed difficulties to raise the participation in adult learning among vulnerable target groups, (b) the perceived lack of relevance of skills provided by adult learning and the skills needs of the labour market and the (c) level of quality of adult learning provision, which is considered as insufficient despite the implemented formal procedures for quality assurance. All three concerns can be also understood as pointing towards improvement required prior to implementing novel support measures for individuals related to the ILA Recommendation. These three perceived areas where improvements are required are explored in the three policy sketches provided in Section 8.

Figure 16. Summary table following the analytical framework

	Instrument/Skill Ecosystem level		**Country level summary**
Short	(a) 'Free Training' provided via an ESF cofounding Framework by the Ministry of Education	(b) Labour Market Training with a Training Card (Tööturukoolitus koolituskaardiga)	
Interplay of demand & supply side funding	Supply-side strategy, with calls for proposals among providers (eligible due to their quality assurance procedure)	Mix out demand-side strategy (beneficiaries receive a 'budget'), however, range of offers is prearranged between PES and providers (the later complying with quality assurance procedures)	Strong reliance on supply-side mechanism (free provision by organisations of the formal education system; 'Free Training' initiative; demand-side component only complementary
Unconditional individual entitlement	No restriction, but selection of offers mainly in line with the anticipated needs of specific target groups	Members of the target groups only (only employees with no vocational qualification, being low wage earners, age 50 or older)	Broad selection of adult learning opportunities (as opportunities in formal adult education) are free of charge, and open to everyone; limited further forms of unconditional support (e.g. tax incentives).
Stable funding source & cost-sharing	Lack of stable funding, however use of ESF funding for a second period; Main source: ESF funding (however, reuse of the funding)	Stable funding source from the unemployment insurance contributions (supplemented by ESF funds)	Stable funding via the public funding for formal education institution, the latter playing a key role for adult learning; use of PES funds; constant use of large parts of ESF funding mainly for education/adult learning.

	Instrument/Skill Ecosystem level		Country level summary
Eligibility & inbuilt targeted support	Coursed offered selected with the aim to support disadvantaged groups	Limited to the target groups, no further preferential treatment	Targeted support mainly by decisions with regard to supply-side funding
Short/long training spells	Mainly short(er) spells (formal programs are offered for free anyway)	Mainly short(er) spells (formal programs are offered for free anyway)	Access to formal adult education is free of charge and play a particular important role; organisations of the formal education system are important providers for non-formal learning (often at no or low fees); (a) and (b) the key additional frameworks
Support for direct costs	No fees for participants	100% funding of fees within the established budget	Provision at now or low fees the main support mechanism
Accumulation	Not required/required	Not required/possible	No regime in place where entitlements need to be/can be accumulated
Independent from employer & portable entitlement	No link to the employer whatsoever	No link to a given employer (however, only employed are eligible)	Supply-side strategies dominate and they are mainly independent of the support by a given employer/can be access with based on any (future) employer
Collective governance/ social partners	Marginal role (mainly via their participation in OSKA used for selecting offers put on offer)		Organised business and labour are considerably week plays in adult learning/skill formation, reflecting the overall weak position of the Social Partners in Estonia and the Estonian politics.
Portal/ information	Dedicated database, but also integrated in JUHAN	Dedicated database, but also integrated in JUHAN	Centralised database informing on learning opporrunities (JUHAN)
Guidance	No specific provision; all adults can receive guidance from PES	Required for receiving access; provided by PES	
Training Leave/ subsistence costs	Training leave rights are applicable (up to 20 days of paid, 10 days of unpaid leave per year)	Training leave rights are applicable (up to 20 days of paid, 10 days of unpaid leave per year)	Training leave rights applicable for supporting short spells of adult learning; Leave supports also formal programs at critical junctures.
Validation	No specific provision	No specific provision	Important provision for shorting formal programs, limited provision for accessing vocational education
Outreach	no specific provision	Media campaign at the time of introduction	Some outreach activities (‘Learners’ weeks’), media campaigns
Quality Assurance	Providers need to be certified for participation	Providers need to be certified for participation	Providers are subject to quality assurance in case they participate in bids; no quality assurance for providers working only based on fees

Source: Authors’ summary

Chapter 8. ‘Policy Sketches’ for working towards the goals of the ILA recommendation and their reception.

8.1 Introduction

The project’s methodology has foreseen the development of ‘Policy Sketches’ for relevant policies reforming one part or several parts of the adult learning system which would allow to make substantial progress towards the goals outlined by the ILA recommendation. Policy Sketches were drafted by members of the research team, typically by taking into considerations the results of early consultations with experts in the countries, and used as common points of reference within the (remaining) expert interviews and the focus group discussions, so that research participants can share their assessment for the sketches under scrutiny. As a common starting point, Policy Sketches are formulated with the goal to represent a range of policies, starting with less demanding ones, and including large-scale reforms with the introduction of an ILA as a potential example.

Policy Sketches were developed to achieve broadly realistic proposals, with similar policies being among the candidates for introduction in the foreseeable future. The introduction of an ILA in line with the key criteria laid out in the ILA Recommendation was considered as one of the Policy Sketches in case desk research and early expert interviews suggested that such a policy development can be regarded as a realistic option for the years to come. Wherever possible, existing policy proposals (e.g. as included in work programs) were taken into consideration when formulating the sketches. In most cases, the research team suggested detailed sketches, so that research participants interviewed can relate to a well-rounded suggestion (for more details on the approach, see the main report).

Based on results of early interviews it had become clear that the introduction of an ILA in Estonia has been deemed an unlikely scenario and that overall, a substantial expansion of public funding for adult learning by entering policy-wise uncharted territory (and not only extending alongside established lines) is not seen as a top priority on the policy agenda (see Chapter 7). In consequence, the topics of the three Policy Sketches have been chosen from the current policy debates on adult learning. They should be understood either as working towards some goals of the ILA Recommendation within currently established structures of the adult learning system (Policy Sketch 1), or as areas of improvement perceived as required prior to implementing novel support measures for individuals related to the ILA Recommendation (Policy Sketch 2 and 3). The sketches include:

- Extending current policies to better support access to formal and non-formal learning for underrepresented groups (Policy Sketch 1)
- Strengthening the link between skill demand and supply via recalibrating the role of OSKA and its corresponding mechanism (Policy Sketch 2)
- Sustained public funding for adult learning conditional to improved quality assurance (Policy Sketch 3).

8.2 Policy Sketch 1: Extending current policies to better support access to formal and non-formal learning for underrepresented groups

Policy Sketch 1 proposes to use additional public funding for systematising and extending existing policies supporting adult learning in favour of three main target groups, namely

- Adults who have been out of the labour market for some time (e.g. due to care obligations), however, who are lacking the skills for re-entering
- Adults (typically belonging to the Russian speaking minorities, but also others) who have only a low(er) level of command of the Estonian language.
- Adults with no upper secondary or tertiary qualification in case, they are aiming at returning to education for studying to a higher level of educational attainment.

All three groups (adults disconnected from the labour market, adults without high levels of proficiency in Estonian language, non-graduates) are known to be at a disadvantage in access to adult learning provision. As highlighted during the discussions in preparation of the new Labor Market Measures Act ([19]), it could be an effective strategy to review and reform all existing support and cofounding instruments to better reach out to members of the three groups disadvantaged in access to adult learning.

First, there are only a few established measures supporting participation in adult learning of those who have been out of the labour market for extended periods of time. Existing instruments supporting people disconnected from the labour market, parents of young children in particular, are typically project based only, however, they could be established on a permanent basis.

Second, against the backdrop of current reforms in the Education system[20], it is expected that adult learning provision available in foreign languages will further decrease – in particular in Russian, as provision in English plays only a minor role. Using more resources for supporting the acquisition of Estonian (in B2 level particular required for higher education programmes) as well as approaches allowing the joint acquisition of Estonian language skills and vocational skills would allow for mitigating the disadvantage of adults who have only a low(er) level of command of the Estonian language within the Estonian labour market and adult learning system. This also needs to be considered in the context of the recently strongly extended share of Ukrainian nationals in Estonia[21] because of Russia's war of aggression against the Ukraine, many of which speak Ukrainian as well as Russian. Also, for adults from Ukraine, alternatives to adult learning provided only in Estonian seem required.

[19] Act of labor market measures in Estonian 'Tööturumeetmete seadus 735 SE', proposal for the Act was launched Nov 7th, 2022 and was approved after three rounds of reading in parliament on Feb 15, 2023, and sent on Feb 17, 2023 to President for final acceptance

[20] In December 2022, it has been decided to mandate Estonian as the main language of instruction in all schools, to become effective by the school year 2024/25. This shift is attributed to a growing consensus within society regarding the expectation that individuals residing in Estonia should have the capability to access all essential services, including education, in the national language, which is Estonian.

[21] Currently there are more than 50 000 Ukrainian refugees in Estonia, see https://migrant-integration.ec.europa.eu/library-document/estonia-unhcr-refugee-integration-assessment-and-recommendations_en

Third and finally, for adults with no upper secondary or tertiary qualification, facilitating access to second chance routes would be required. This can include an abolishment of fees for part-time studies (considering a kind of exception of a pattern where access to formal programs is offered for free) and an extension of contributions to the living costs during phases of full-time or part-time education. The latter approach has already been followed up upon with the new act on employment measures (2023) ([22]), which established that those in full-time programs in vocational education or within academic upper secondary education may be eligible for unemployment benefits if they are 16 years or older and have previously been employed for at least 180 days a year. Via such an extension of contributions available to the living costs, the number of low qualified adults who are working towards a higher level of education attainment is expected to be increased soon.

To conclude, Policy Sketch 1 refers to:

- The deliberate extension of existing funding support schemes (mainly supply-side funded provision, but also the Labor market training with a training card scheme);
- the extension of contributions to the living costs during participation (via the instrument of unemployment benefits) for members of the three aforementioned target groups, insofar they are currently not included among the eligible beneficiaries.
- The removal of limitations in accessing higher education institutions (fees for part-time studies) for adults and supporting those engaged in studies.

Instead of introducing a novel individual learning account, a defined additional tax-based budget would be used to cover the increased public costs for a rise in the number of beneficiaries in the established schemes and for paying for the extended schemes, respectively, a loss in income from abolished fees (for part-time studies).

Table 2. Summary of the SWOT analysis of Policy Sketch 1 (against the backdrop of the analytical framework)

Alignment of policy sketch with analytical framework	Strengths	■ Building on established frameworks while expanding the groups of beneficiaries ■ Reaching larger parts of the population via a supply-side funded (free-of-charge) offer (unconditional universal access) ■ Strengthening access to HE for adults ■ Expanding the contributions to the living costs (unemployment benefits during participation) to a broader selection of adults (enabling framework)
	Weaknesses	■ Insecure public funding base (danger of cuts in time of high demands/squeezes of public finances) ■ No individual entitlement (access depends on the availability of study places/spells open in course work) ■ Individual choice might remain limited (a lack of places in preferred areas of course work might not be avoided) ■ Employers do not contribute to the costs (cost sharing opportunities limited) ■ Courses offered for free might continue to see high dropout rates (effectiveness of provision not secured)

[22] approved by the Estonian parliament in February 2023

		▪ Little additional motivational element for participation (compared to 'making good use of an individual entitlement')
Desirable/ undesirable effects if implemented; complementarity with other instruments	Opportunities	▪ Strengthening existing framework by removing identified limitations – broadening access ▪ Strengthening of formal adult learning and VET within the policies
	Threats	▪ Foreseeable future reduction of the funds made available by the ESF (national sources required) ▪ Some of the underlying proposals (e.g. eliminating fees for part time studies, sustaining Estonian as the main language of instruction in CVET) are contested ▪ Existing policies might already elicit much of the potential of participation among the target groups, limiting the opportunities for further expansion of the support

Employee representatives suggested that policies to ease re-entrance to the labour market, and policies for those with lower command of Estonian, are already broadly in place or are currently under development. However, they emphasized that while B2 level of Estonian is required for higher education programmes, the PES funds only course work up to the level B1, so that a major gap in provision has emerged. Furthermore, they emphasized that support for those aiming at returning to formal education for studying to a higher level of educational attainment would need to be further strengthened. Employee representatives, however, emphasized that Policy Sketch 1 could work only when being complementary to broader labour market policies, increasing the demand for qualified workers. More specifically, they highlighted the relevance of regional labour market needs, as potential learners might be mainly motivated by expected future increases in wages based on strong regional demands for skilled work, and not by more generous support arrangements for entering adult learning alone.

Employer representatives confirmed the positive effects of participation in formal programmes and the support for Estonian as a second language for the employability of workers, thereby expressing support for Policy Sketch 1. They also argued that some employers may not support learning not immediately required for a current workplace, implying that workers would need to take a break from gainful work for entering adult learning. Therefore, employer representatives put emphasis on the option to participate based on contributions to the living costs made available when gainful work need to be paused.

The **employment policy** representatives agreed that employers currently do not provide sufficient support to their employees. They emphasized the need for designing better support schemes for those in formal education. However, they emphasized that low-skilled re-entrants and those with low level of knowledge in Estonian are already well covered by existing support instruments, with little further potential for expansion.

Concerning the field of **education policy,** state representatives stressed that the mentioned target groups are already targeted by various measures, including those in formal education (especially at the bachelor level), however, with varying degree of success. They noted a need to better inform about the support available to take up studies and a further need

to support studies at the Master level in higher education. The representatives of the field of adult education (further education) suggested that there is a need for further awareness building among hard-to-reach target groups. They highlighted that language learning should be designed as part of vocational learning programs, as courses supporting language learning in a stand-alone fashion have difficulties to attract and motivate learners. Furthermore, they suggested that schemes supporting employer-provided training should be promoted and supported, particularly at the regional level, as a way of complementing the existing policy strategies mentioned in the Sketch 1.

Regional-level actors representatives welcomed the emphasis on widening public support to those in formal education, acknowledging that employers on average provide too little support for extend participation spells. Direct public contributions to employers' costs during spells of absence due to participation in adult learning are also considered as a way forward. Scepticism has also been aired as existing forms of support might have already exploited the potential for participation among the target groups, so novel line of delivery would be required to make progress. Support for second language acquisition has been highlighted as of particular importance in regions with large Russian speaking minorities.

8.3 Policy Sketch 2: Strengthening the link between skill demand and supply via recalibrating the role of OSKA and its corresponding mechanism

Following the responses of Estonian experts and in the light with the recent policy development, it has become clear that any further expansion of public funding for (non-formal) adult learning – irrespective whether via an extension of the supply-side arrangements or via an demand-side strategy of as an ILA – poses the question in what ways and to what extent public funding for adult learning provided should be made conditional to a proven relevance of the expected learning outcomes for the labour market.

As described in Section 6.1 and 6.2, public funding for adult learning is reserved for preselected courses provided by carefully selected providers. Decisions are expected to be rooted in OSKA forecasts. Support is not available for the whole range of providers and courses on offer, but only for a selection. However, there are calls for an even tighter link between the public funding arrangements for adult learning and the forecasted skill needs present in labour market. According to this perspective, public support made available should be made conditional to a positive assessment of the likeliness that an individual applicant will manage to successfully acquire the intended skills and apply these skills in the workplace. Estonia's recent policy making has put emphasis on a 'skill-based approach', with the support of the OSKA approach as its main outcome. Accordingly, there are calls to foresee an even stricter link between public funding and evidence provided by the OSKA system.

In case public funding can be made conditional to a proven need of learning outcomes in the labour market, valid at least for the individual case under review, the overall range of learning opportunities supported could be expanded. This could further increase individual motivation and could mitigate inequality, as currently, adults from economically strong households can buy freely from the whole 'basket' of fee-taking learning offers according to

their preferences, while less affluent adults are facing a cost barrier and are therefore limited to the range of pre-selected free-of-charge offers. For this expansion, both strategies could be considered, supply-side funding or demand-side funding strategies. Individuals are expected to be more motivated to participate in case they can select from a much broader range of (supported) learning opportunities. Moreover, they might use counselling for deciding about the pathway to choose and they might use properly the information on future skill needs.

For Policy Sketch 2, variations were discussed, which would try to achieve a tradeoff between the extension of the range adult learning offers eligible for public funding and the reinforcement of procedures safeguarding that learning outcomes can be achieved and are in demand in the labour market. For eligibility for public funding, offers would need to contribute to learning outcomes forecasted as being high in demand, with the results of the OSKA forecast becoming the yard stick to be applied. In an even more directive approach, individual counselling might be made mandatory with public funding conditional to agreeing on a career plan (echoing the current practice with the Labour Market Training with a Training Card). In this more directive arrangement for establishing eligibility for public funding, even the perception of the current employer might be taken into consideration. In short, the extension of eligibility of public funding to a broader range of learning opportunities would be balanced by stricter requirements to be met when applying for the support.

To conclude, any expansion of public support (as for example via an individual learning account) is discussed as requiring a tougher governance of eligibility criteria for support. While improved governance mechanism would allow for expanding the range of activities eligible for funding, this expansion might be limited by policies taking away some of the expanded choice for the sake of a better match between skill supply and demand.

Table 2. Summary of the SWOT analysis of Policy Sketch 2 (against the backdrop of the analytical framework)

Alignment of policy sketch with analytical framework	Strengths	■ Moving to a more universal entitlement, by expanding overall public funding and the range of eligible forms of adult learning provision ■ Strengthening of labour market relevance
	Weaknesses	■ Limiting access to support (by criteria beyond individual control) ■ Large efforts required to establish the eligibility of support by assessing the individual's adult starting position (likeliness to succeed; anticipated skill needs in the current/in an accessible future job); high costs for 'red tape'; Decisions for/against support are likely to be contested, transparency of decisions might be difficult to achieve ■ Remaining quality issues in the provision of adult learning might undercut the intended stronger link between adult learning and labour market needs.

Desirable/ undesirable effects if implemented; complementarity with other instruments	Opportunities	■ Increasing motivation by achieving overall higher returns from participation (positive reinforcement) ■ Higher public returns help to secure financial sustainability of support.
	Threats	■ Forecast might be inaccurate/invalidated by unforeseeable developments ■ Decisions for/against individual access to support might be biased/might limit access for members of vulnerable groups (suffering from 'statistical discrimination')

Unsurprisingly, the equation 'more public funding conditional to tighter public control' has been commented differently across stakeholder groups.

Employee representatives are not in favour of a directive approach; to the contrary, they supported the idea that individuals should select freely among lifelong learning opportunities, as acquired skills are likely to find their useful application at a later stage anyway. Eligibility criteria for public funding should be defined based on general principles only, and not depending on the implementation of individual agreements deemed as overly bureaucratic. Adult learning opportunities funded based on public sources should be openly communicated and there should be no limitations in access (e.g. based on the likeliness of successful completion).

Employer representatives supported the idea of a better alignment between course work supported and labour market needs, however, mainly expressed the need for expanding the support overall and for career guidance and on-the-job mentoring/coaching in particular, the latter seen as more helpful than formal, bureaucratic procedures installed with the main goal to decide for or against the provision of formal support. Individual coaching opportunities would be seen as a desirable, however, also costly extension of the available services.

The state level representatives of the **employment policy** field stressed the usefulness of career counselling for deciding on what type of CVET – in which subfield, at which level – should be selected to support an adult's individual goal. In case that the use of career counselling as the base of decision making could be effectively strengthened, the range of eligible learning opportunities could be either kept or even further expanded. The counselling would effectively secure the match between the skills acquired and the skills need in the labour market and for achieving such a match, a broader range of eligible offers would be desirable.

Within the **education policy** field, state representatives are clearly supporting an approach allowing for a much tighter governance of the provision of financial support for adult learning. They see a clear need to increase efficiency of support and to reduce the public funding requirement as such, so that the system can be prepared for the situation where the resources available from EU funds will be less generous. Binding support to a proven usefulness for individual career development is seen to reduce the overall burden on public funding, without losing too much of the positive effects available from adult learning. The skill-based approach is thereby seen as instrumental for 'achieving the same with less'. The approach is not considered as preparation for expanding state-funding for adult learning.

In contrast, representatives of adult education (further education) promoted the idea of universal and unconditional access to adult learning opportunities funded by the state and therefore opposed the idea of making support conditional to a positive assessment of the likeliness that skills acquired will be used in the workplace in the foreseeable future.

8.4 Policy Sketch 3: Sustained public funding for adult learning conditional to improved quality assurance

The current stage of the approach for quality assurance in adult learning has been put forward as a limitation for introducing an individual learning account in Estonia. Quality assurance is delivered on one hand within the provision of adult learning provided by institutions belonging to the public education system. On the other hand, where public procurement is used (see Section 6.2 and 6.3), the process can be used to establish quality standards and mandate providers to promise to meet these standards. However, for adult learning providers offering their service based on fees only, there are currently no quality assurance systems in place. In case, individuals would receive funding to buy course work of their choice (for example via an individual learning account), many providers currently outside the established routes for quality assurance would come into the picture and would be the secondary beneficiaries of public funding. Currently, there is no approach available which would limit an exploitative behaviour of for-profit organisations, which might specialize in non-intended ways to gain a share in the public support made available to individuals.

Policy Sketch 3 responds to the perceived need for a comprehensive quality assurance system which would cover all providers that would like to see their offers eligible for public (co-)funding. Furthermore, the Sketch echoes the – by the time of the writing – ongoing policy discussion about the need for changes in the act of adult education and training ([23]). The reform proposal to update the Act on Adult Education and Training included a new system to assess the quality in provision of micro-credentials, including – following proposals put forward by organised business – the introduction of a feedback system under public control**,** which collect comparable data on quality of provision. The same proposal foresaw a new formal qualification requirement for anyone providing adult learning, that is to demonstrate the required competences in andragogy/adult education.

Going beyond the two mentioned proposal of reform for the Act of Adult Education and Training, Policy Sketch 3 includes the idea that learners might receive the right to withdraw public cofounding (provided for the course selected)/deny payment in case that the quality of provision does not meet the expectations. There are comparable experiments within the field of Estonian as a Second Language, where learning providers receive participation fees only for participants, who were not dropping out from the course (irrespective of their success during later State exams). However, little is known about the effects of this funding conditional to course completion on the quality of course provision.

To sum up, Policy Sketch 3 suggested to improve the quality assurance system by

[23] The proposal to prepare act on changes in Adult Education and Training Act was launched in June 17, 2022 for consultations; several stakeholders submitted their opinions within one month; the Act has yet not seem to have proceeded to the parliament (by March 2024).

- A mandatory formal feedback system collecting relevant data on quality from providers
- Mandatory minimum standards for competences of anyone delivering adult learning
- A strengthening of the rights of participants to withdraw funds/withhold payments in case of low quality of the services delivered.

Table 3 reviews the proposal against the backdrop of the analytical framework. By the attempt of securing quality across all sectors, one anticipated main hindrance for a stronger use of demand-side schemes similar to the ILA approach would be removed, while – as part of the enabling framework – providing an impulse for working towards higher levels of quality across all types of adult learning providers. However, implementation of instruments will contribute – at least in the short run – to increased costs of provision and the required heterogeneity of offers will create difficulties for achieving the intended levels of transparency. In the long run, measures suggested might effectively raise the quality of adult learning provision and strengthen the levels of professionalism of adult educators. However, as for practically any formal regulation, there is a risk that providers will only comply on a symbolic level while adult learning provision might remain broadly untouched by the new regulations imposed.

Table 3. Summary of the SWOT analysis of Policy Sketch 3 (against the backdrop of the analytical framework)

Alignment of policy sketch with analytical framework	Strengths	■ Securing the basis for extended public funding beyond the current level ■ By strengthening quality assurance beyond the area of supply-side funded provision, demand-side instruments could be implemented as a complementary tool ■ Feedback mechanisms and standards of professionalism of provision can increase the quality in adult learning provision (in the long run) ■ Extended rights of participants would strengthen their positions/drive up quality standards of provision over time
	Weaknesses	■ Increased costs of provision due to the required formal procedures/certification requirements of adult educators ■ Heterogeneity of offers in the adult learning market will limit comparability of results of formal evaluation (approaches might fall short to deliver the intended outcomes)
Desirable/ undesirable effects if implemented; complementarity with other instruments	Opportunities	■ Quality of provision would be strengthened even in sectors, which are already under public oversight ■ Facilitating organisational learning across types of provides of adult learning ■ Expanding resources for working towards improved standards of professionalism among adult educators
	Threats	■ Lack of effectiveness of measures proposed due to ‘decoupling’ of formal adherence to the set requirements and day-to-day practices in adult learning provision

Even though the topic of quality assurance emerged as the key topic from the expert interviews, during the focus group, the proposed measures receive only partial or limited support.

To start with opinions shared across research participants, there is a consensus for the goal of expanding quality assurance approaches to all providers of adult learning. However, two of the solutions proposed were rated as inappropriate by most experts. The approach to collect feedback from participants was perceived as inadequate, given that participants might apply different standards, so that more direct approaches for measuring the quality of tutoring would be required to validate students' feedback. The idea of giving the participants the right to deny payment/takeaway public funding in case of perceived lack of quality was also considered mainly impractical. A perceived lack of quality might be the outcome of a poor match between the learners' needs and the courses assigned, so improving the quality of educational and career guidance was seen as a more fruitful way forward.

Among stakeholders of the **employment policy** field, substantial attention has been paid to the question of how the level of competences and professionalism from the various groups of professionals engaged in the provision of adult learning should be improved and how a minimum standard of professionalism should be guaranteed. Various stakeholders explicitly emphasized that minimum qualification standards in andragogy should be part of the solution.

Among representatives of **adult education policy**, at least some support was voiced in favour of a proper institutionalized approach allowing for collecting learner feedback, but overall, the aired scepticism regarding the validity of likely results was shared. Similar to stakeholders from the employment policy field, the solution of introducing minimum qualification standards in andragogy was seen as a favourable way forward.

Employee as well as employer representatives agreed to the idea of imposing minimum qualification standards in andragogy, however, emphasized the need for a procedure of documenting and validating the skills and competences acquired by adult educators active in the various fields. It should be avoided that a formal examination would be the only way to demonstrate the acquired competences in delivering adult learning.

To conclude, the idea of investing in initiatives to improve the quality of adult learning provision and to include those adult learning providers which are currently working outside any public oversight received much support. However, apart from minimum qualification standards in andragogy, the discussed specific means to improve quality are considered as not fit for purpose, with various recent proposals present in government proposals being problematized and receiving only limited support.

8.5 Summary – Closing the gaps: What the implementation of the policy sketches has to offer in fulfilling the goals of the Council recommendation on ILA

In Estonia, the introduction of an Individual Learning Account has been deemed an unlikely scenario by research participants interviewed for three main reasons: Firstly, the required

expansion of public funding for adult learning has been rated as unfeasible, in particular when studied against the backdrop of increased public funding provided in the recent years. Secondly, the individual-mediated, demand-side funding approach has been considered as a poor fit to the overall funding arrangements, mainly building on supply-side strategies. Thirdly, features of the adult learning system were found to be not sufficiently developed to allow a smooth application of an ILA type instrument.

Against this backdrop, the case study has discussed three policy scenarios, which should be understood either as working towards some goals of the ILA recommendation within currently established structures of the adult learning system, or as areas of improvement perceived as required prior to implementing novel support measures for individuals related to the ILA Recommendation. Policy Sketch 1 deals with the question of what can be done about the differences in participation in adult learning across socioeconomic groups by improving existing structures of Estonia's adult learning system. Policy Sketch 2 takes up the passionately discussed question of how adult learning provision can become better aligned with the current or future needs of the labour market. Finally, Policy Sketch 3 concerns the worries about the quality of provision in all segments of the adult learning market, which are currently beyond any form of state oversight, the improvement of which is seen as a prerequisite for expansion of public funding for adult learning.

Policy Sketch 1 foresees the use of additional public funding to cover the public investment for measures supporting specific target group currently underserved by adult learning provision. While some of the measures are already put into law (e.g. opening unemployment benefits as a source for meeting the living costs during the participation in course work allowing the acquisition of upper secondary education), others are proposed to scale up the participation of identified target groups (as e.g. the abolishment of tuition fees for part-time studies). Overall, the idea of reinforcing policies in place or already in discussion in support of specific target groups found broad support among research participants across fields and levels of policy making and on both sides of the industrial divide.

Policy Sketch 2 reflects the option to make public funding for adult learning conditional to the outcome of the skill demand forecast system or even conditional to a positive forecast at the individual level. Here, conflicts of interest clearly become visible, with state representatives from employment and education policy mainly concerned with the need for an option to reduce public funding without losing too much of the positive effects, and employee representatives others concerned that individuals should freely choose among a broad range of possibilities. Overall, using skill forecast techniques for prioritising areas of adult learning enjoy broad support. Moreover, the provision of career counselling is considered an important facilitator as long as access to public support is not made conditional to a high level of likelihood that an adult individually will succeed in the course work or will make immediate use of the skills in the workplace.

Policy Sketch 3 reflects the options at hand for working towards a comprehensive system of quality assurance, also including providers which are currently not receiving any public funding and are therefore perceived as being out of any control by policy making. Proposed measures are also reflected in current proposals for legislative reform, a formalized system of collecting feedback on quality, the implementation of minimum levels of qualification of adult educators, and the extension of rights of participants to deny payment for perceived quality

issues. Overall, while the importance of working towards increased levels of quality in adult learning provision has been confirmed by experts, the set of measures present in recent government proposals has received limited support.

Chapter 9 – Conclusion and reflections for policy making

In Estonia, taking education seriously is a shared preoccupation of policy makers and the public alike. A lot of pride is taken into the success of the education system as demonstrated by the PISA (Programme for International Student Assessment) scores of 15-year-olds, with Estonian students being among the best performing in the world. The PISA results reflect a culture of learning rooted in general education, with a strong focus on the acquisition of formal knowledge and strong support from society to achieve the best results. However, in Estonia, the share of dropouts from vocational education and training and higher education remains about one in five, despite the improvements made in the past. Strong reliance on the state-governed and state funded formal education system is accompanied by overall less well-developed structures of provision of non-formal adult learning, with employers playing a weaker overall role in training provision by comparison to the situation in other EU Member States. Moreover, while there is a widely shared perception that the formal education system across all quarters (general versus vocational) and levels (upper secondary versus tertiary) is insufficiently linked to the needs of the labour market, there is less agreement on how the required coordination can be achieved. Moreover, despite the state's important role in the provision of education and adult learning in particular, investing in one's own further education is seen first and foremost as an individual imperative, that is an individual strategy to make more out of oneself, to secure one's success in the labour market within the wider society. In short, education policy is strongly underpinned by a neoliberal credo of everyone expected to be striving towards individual goals, which works as a hindrance to any bold extension of state support for adult learning, the latter seen mainly as a private responsibility shared by employers and the private households.

Nevertheless, the Estonian adult learning system has seen an expansion of public funding for the provision of adult learning, with European Union sources being a major driving force. New schemes based on income from the unemployment insurance for the employed have been introduced in 2017. ESF funded provision of free courses was expanded between the 2014 to 2021 period and is about to be extended to the ESF funding period up to 2027.

Overall, by the Spring of 2022, Estonian policy discourse has been more preoccupied by securing 'better outcomes' based on what is perceived a substantial increase in public support for adult learning in the past decade. So, there is little appetite to consider a further major extension of public funding for adult learning. While the idea of an individual learning account should link up well with the established credo of putting emphasis on individual responsibility, the demand-side strategy with its reliance on an effective adult education market providing high quality services does not sit well with the established structures of adult learning provision. As demonstrated, in the latter, organisations of the formal system play a vital role in providing non-formal learning as well. Moreover, the largest public funding framework for adult learning by far is using a supply-side strategy, with adults participating in free courses instead of receiving financial contributions enabling them to pay for fees themselves. Furthermore, there is the perception that other problems of adult learning provision need to be worked out first before pouring in more public money. Overall, even experts demonstrating a sympathy for

creating an ILA-type individual entitlement tend to agree, that it might be premature to bring it up into policy considerations for the time being.

To conclude, the Estonian case study provides insight into the policy discussions in a country, which has been proven to be successful in significantly expanding adult learning participation in the past decade, with the extension of public funding having played an important role in this regard. Consequently, further expansion of public funding and the ILA approach in particular have not been met with much enthusiasm. It is safe to state that other preoccupations have been perceived as more urgent in further enhancing the adult learning system of Estonia.

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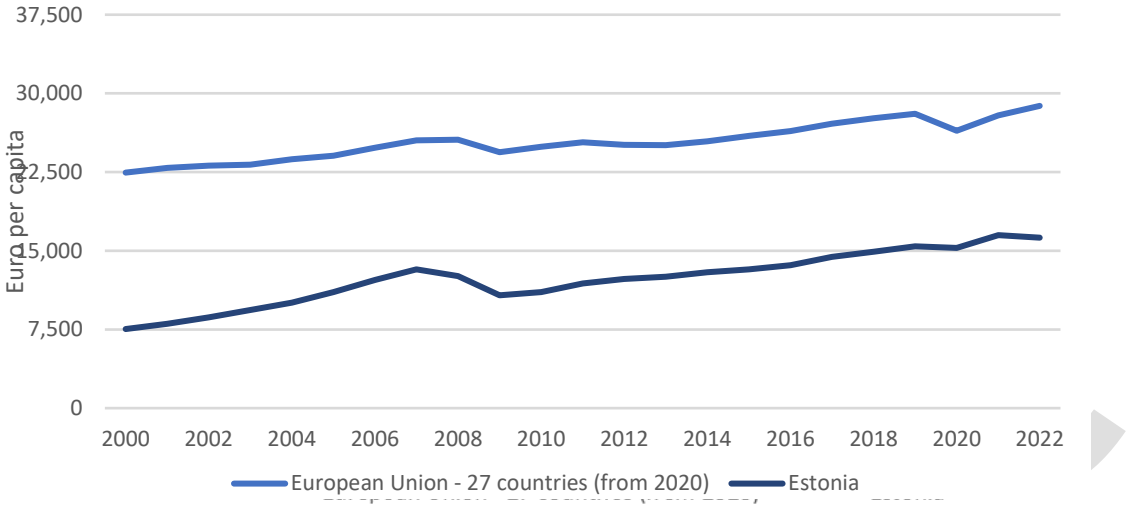
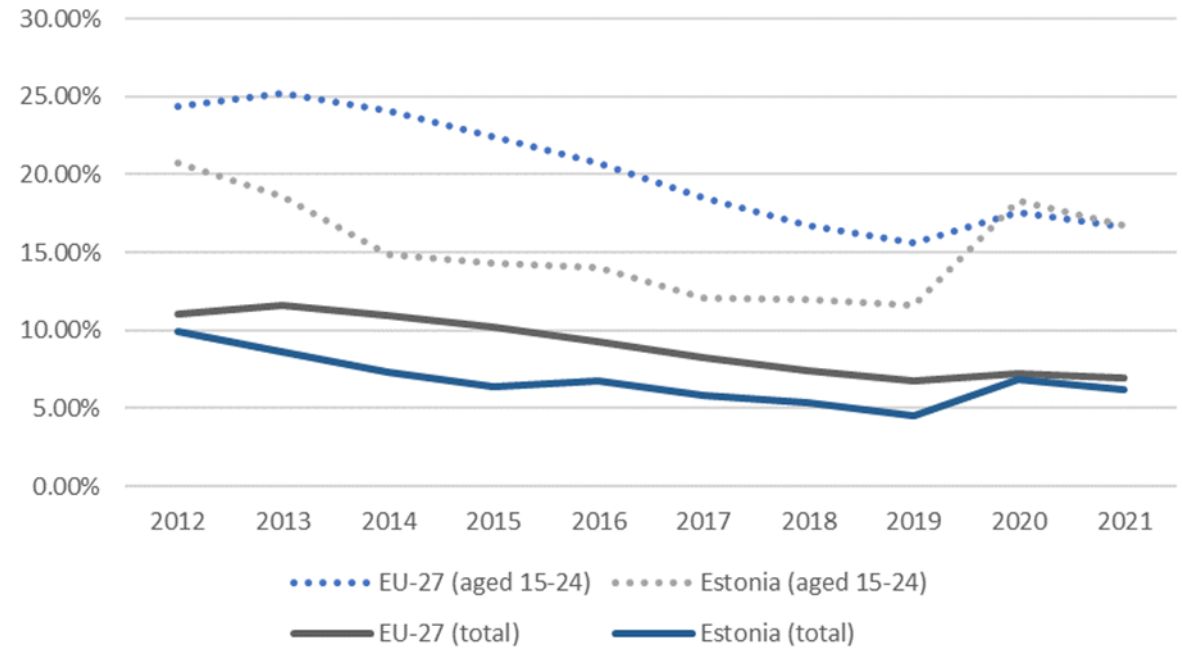
Annex

Figure 5. Real GDP per capita – Estonia, 2000-2022



Source: Source: Eurostat – SDG 08 10 [version: 8.3.23]

Figure 6 Unemployment & youth unemployment rate – Estonia, 2012-2022



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