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A Memorandum on Lifelong Learning

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1. INTRODUCTION

The European Council held in Lisbon in March 2000 marks a **decisive moment for the direction of policy and action in the European Union**. Its conclusions affirm that Europe has indisputably moved into the Knowledge Age, with all that this will imply for cultural, economic and social life. Patterns of learning, living and working are changing apace. This means not simply that individuals must adapt to change, but equally that established ways of doing things must change too.

The conclusions of the Lisbon European Council confirm that the move towards **lifelong learning must accompany a successful transition to a knowledge-based economy and society**. Therefore, Europe's education and training systems are at the heart of the coming changes. They too, must adapt. The conclusions of the Feira European Council invite the "Member States, the Council and the Commission ... within their areas of competence, to identify coherent strategies and practical measures with a view to fostering lifelong learning for all".¹ This Memorandum takes up the Lisbon and Feira European Councils' mandate to implement lifelong learning. Its purpose is to **launch a European-wide debate** on a comprehensive strategy for implementing lifelong learning at individual and institutional levels, and in all spheres of public and private life.

The Commission and the Member States have defined lifelong learning, within the European Employment Strategy, as all purposeful learning activity, undertaken on an ongoing basis with the aim of improving knowledge, skills and competence.² This is the working definition adopted in this Memorandum as a starting-point for subsequent discussion and action.

Lifelong learning is no longer just one aspect of education and training; it **must become the guiding principle** for provision and participation across the full continuum of learning contexts. **The coming decade must see the implementation of this vision**. All those living in Europe, without exception, should have equal opportunities to adjust to the demands of social and economic change and to participate actively in the shaping of Europe's future.

The implications of this fundamental change in perspectives and practices deserve and justify the debate proposed here. **The Member States**, who are responsible for their education and training systems, **should lead this debate**. It should also be conducted in the Member States, and not only at European level. Lifelong learning concerns everyone's future, in a uniquely individual way. The debate should take place **as close as possible to citizens themselves**. **The Commission intends to draw up a report in autumn 2001 based on its outcomes**. This report will be taken up within the framework of the open method of co-ordination agreed by the Lisbon European Council.³

¹ Feira European Council conclusions, paragraph 33.

² The European Employment Strategy was initiated at the November 1997 Heads of State European Council in Luxembourg. This strategy established a monitoring and reporting procedure for all Member States, based on annually revised Employment Guidelines. The Employment Strategy rests on the four pillars employability, entrepreneurship, adaptability and equal opportunities.

³ Lisbon European Council conclusions, paragraph 37. The new open method of co-ordination involves fixing European guidelines and timetables for achieving specific agreed goals, establishing (where appropriate) indicators and benchmarks in order to compare best practice, translating European guidelines into specific targets and measures adapted to fit national and regional differences, and establishing mutual learning processes based on regular monitoring, evaluation and peer review of progress. As stated in paragraph 38, "A fully decentralised approach will be applied in line with the

This Memorandum opens by stating the case for implementing lifelong learning. Section 2 argues that promoting active citizenship and promoting employability are equally important and interrelated aims for lifelong learning. Member States agree on its priority, but have been slow to take concerted action. Section 3 argues that the scale of current economic and social change in Europe demands a fundamentally new approach to education and training. Lifelong learning is the common umbrella under which all kinds of teaching and learning should be united. Putting lifelong learning into practice demands that everyone work together effectively – both as individuals and in organisations.

In response, Section 4 highlights **six key messages** which **offer a structured framework for an open debate** on putting lifelong learning into practice. These messages are based on experience gathered at European level through Community programmes and the European Year of Lifelong Learning (1996). Each key message includes a set of questions, the answers to which should help to clarify priority areas for action. The key messages suggest that a comprehensive and coherent lifelong learning strategy for Europe should aim to:

- guarantee universal and continuing access to learning for **gaining and renewing the skills** needed for sustained participation in the knowledge society;
- visibly **raise levels of investment** in human resources in order to place priority on Europe's most important asset – its people;
- develop effective **teaching and learning methods** and contexts for the continuum of lifelong and lifewide learning;
- significantly improve the ways in which learning **participation and outcomes** are **understood and appreciated**, particularly non-formal and informal learning;
- ensure that everyone can easily access good quality **information and advice** about learning opportunities throughout Europe and throughout their lives;
- **provide lifelong learning** opportunities **as close to learners as possible**, in their own communities and supported through ICT-based facilities wherever appropriate.

A framework of partnership should help to mobilise resources in favour of lifelong learning at all levels; this Memorandum closes, in Section 5, with examples of how European level actions can assist Member States to make progress. Working together to put lifelong learning into practice is the best way forward

- **to build an inclusive society which offers equal opportunities for access to quality** learning throughout life to all people, and in which education and training provision is based first and foremost on the needs and demands of individuals;
- **to adjust the ways in which education and training is provided**, and how paid working life is organised, so that people can participate in learning throughout their lives and can plan for themselves how they combine learning, working and family life;
- **to achieve higher overall levels of education and qualification** in all sectors, to ensure high-quality provision of education and training, and at the same time to ensure that

principle of subsidiarity in which the Union, the Member States, the regional and local levels, as well as the social partners and civil society, will be actively involved, using variable forms of partnership”.

people's knowledge and skills match the changing demands of jobs and occupations, workplace organisation and working methods; and

- **to encourage and equip people to participate more actively** once more in all spheres of modern public life, especially in social and political life at all levels of the community, including at European level.

The key to success will be to build on a sense of shared responsibility for lifelong learning among all the key actors – the Member States, the European institutions, the Social Partners and the world of enterprise; regional and local authorities, those who work in education and training of all kinds, civil society organisations, associations and groupings; and, last but not least, individual citizens themselves. Our shared aim is to build a Europe in which everyone has the opportunity to develop their potential to the full, to feel that they can contribute and that they belong.

2. LIFELONG LEARNING – TIME TO TAKE ACTION

Why is this debate so urgent? Why is putting lifelong learning into practice a top priority for the European Union? There are two equally important reasons:

- Europe has moved towards a knowledge-based society and economy. More than ever before, access to up-to-date information and knowledge, together with the motivation and skills to use these resources intelligently on behalf of oneself and the community as a whole, are becoming the key to strengthening Europe's competitiveness and improving the employability and adaptability of the workforce;
- today's Europeans live in a complex social and political world. More than ever before, individuals want to plan their own lives, are expected to contribute actively to society, and must learn to live positively with cultural, ethnic and linguistic diversity. **Education, in its broadest sense, is the key to learning and understanding** how to meet these challenges.

These two features of contemporary social and economic change are interrelated. They underlie **two equally important aims for lifelong learning: promoting active citizenship and promoting employability**. Active citizenship focuses on whether and how people participate in all spheres of social and economic life, the chances and risks they face in trying to do so, and the extent to which they therefore feel that they belong to and have a fair say in the society in which they live. For much of most people's lives, having paid work underpins independence, self-respect and well-being, and is therefore a key to people's overall quality of life. Employability – the capacity to secure and keep employment – is not only a core dimension of active citizenship, but it is equally a decisive condition for reaching full employment and for improving European competitiveness and prosperity in the 'new economy'. Both employability and active citizenship are dependent upon having adequate and up-to-date knowledge and skills to take part in and make a contribution to economic and social life.

Change can only come about in and through the impetus of the Member States, with Community-level support and facilitation where appropriate. It is the Member States who, in the first instance, are responsible for their education and training systems – each according to their institutional circumstances. In practice, the achievements of these systems are dependent upon the input and commitment of a wide range of actors from all walks of social and economic life, including the Social Partners – and not least upon the efforts of individuals themselves, who, in the last instance, are responsible for pursuing their own learning.

The importance of lifelong learning for Europe's future has now been endorsed at the highest level. The Heads of the Member States agree that in the next decade, the European Union should set an example for the world. Europe can – and must – show that it is possible both to achieve dynamic economic growth and to strengthen social cohesion. Emphasising that *“people are Europe's main asset and should be the focal point of the Union's policies,”* the conclusion is that, above all, education and training systems must adapt to the new realities of the 21st century and that *“lifelong learning is an essential policy for the development of citizenship, social cohesion and employment.”*⁴

These messages are the natural outcomes of a decade during which lifelong learning has once more risen to the top of national and international policy agendas. In the early 1990s,⁵ Europe's economies had to come to terms with sharply changing production, trade and investment patterns. This threw labour markets out of balance, resulting in high levels of structural unemployment alongside increasing skills gaps and mismatches. To help resolve these problems, patterns of education and training provision and participation demanded more attention. The 1996 European Year of Lifelong Learning (EYLL) showed just how much interest and commitment exists at all levels for lifelong learning, and this helped to influence policy thinking in the Member States.⁶

By the mid-1990s, it was agreed not only that education and training throughout life helps to maintain economic competitiveness and employability, but it is also the best way to combat social exclusion – and this means that teaching and learning must place individuals and their needs at the centre of attention.⁷ On this basis, lifelong learning became the common guiding principle for the new generation of Community education, training and youth programmes.⁸ Since 1998, the Employment Guidelines have stressed the importance of lifelong learning for employment but the assessment of their implementation has shown that little progress has been achieved so far in promoting a comprehensive strategy on lifelong learning.⁹ The European Parliament strongly supports the view that lifelong learning is the key to ensuring social integration and to achieving equal opportunities.¹⁰ On the international stage, recent G8 Summits have underlined for the first time the importance of lifelong learning for everyone in the ‘new economies’ of the Knowledge Age.¹¹

⁴ European Council Presidency Conclusions, Lisbon, 23-24 March 2000, paragraphs 5, 24 and 25, pp. 2 and 8; European Council Presidency Conclusions, Santa Maria da Feira, 19-20 June 2000, paragraph 33, p. 6.

⁵ Growth, Competitiveness and Employment, European Commission White Paper, 1993.

⁶ Implementation, results and overall assessment of the European Year of Lifelong Learning (1996), Report from the Commission of the European Communities, COM(1999)447 final, 15 September 1999.

⁷ Teaching and Learning – towards the learning society, European Commission White Paper, 1995. The 1997 Amsterdam European Community Treaty subsequently introduced the provision, in its Preamble, *“to promote the development of the highest possible level of knowledge for their peoples through a wide access to education and through its continuous updating.”*

⁸ Towards a Europe of Knowledge, Communication from the Commission of the European Communities, 12 November 1997 (COM(97)563 final); Council Decision establishing LEONARDO II (1999/382/EC, 26 April 1999) and Decisions of the European Parliament and of the Council establishing SOCRATES II (253/2000/EC, 24 January 2000) and YOUTH (1031/2000/EC, 13 April 2000)

⁹ Guidelines for Member States' Employment Policies 2001, Communication from the Commission, COM(2000)548, 6 September 2000; Joint Employment Report, COM(2000)551, 6 September 2000.

¹⁰ Report on the European Commission report on the implementation, results and overall assessment of the European Year of Lifelong Learning (1996), European Parliament, Committee on Culture, Youth, Education, the Media and Sport, 14 July 2000 (A5-0200/2000 final), p. 20.

¹¹ Cologne Charter – Aims and Ambitions for Lifelong Learning, G8 Summit Meeting, Cologne, June 1999; Education in a Changing Society, Chair's Summary of the G8 Education Ministers Meeting, Tokyo, 1-2 April 2000; G8 Summit Conclusions, Okinawa, 21-23 July 2000. In addition, at the World

The Union's Member States have clearly found a large measure of consensus on their shared interest in lifelong learning, but this has not yet been translated into effective action. The time has come to do so.

3. A CITIZENS' EUROPE THROUGH LIFELONG LEARNING

3.1. Knowledge societies: the challenge of change

Today's Europe is experiencing change on a scale comparable with that of the Industrial Revolution. Digital technology is transforming every aspect of people's lives, whilst biotechnology may one day change life itself. Trade, travel and communication on a world scale are expanding people's cultural horizons and are changing the ways in which economies compete with each other. Modern life brings greater chances and choices for individuals, but also greater risks and uncertainties. People have the freedom to adopt varied lifestyles, but equally the responsibility to shape their own lives. More people stay in education and training longer, but the gap is widening between those who are sufficiently qualified to keep afloat in the labour market and those who are falling irrevocably by the wayside. Europe's population is also ageing rapidly. This will change the make-up of the labour force and the patterns of demand for social, health and education services. Last but not least, European societies are turning into intercultural mosaics. This diversity holds great potential for creativity and innovation in all spheres of life.

This Memorandum cannot provide an in-depth analysis of the changes summarised so briefly immediately above. But they are all part and parcel of the overall transition to a knowledge society, whose economic basis is the creation and exchange of immaterial goods and services. In this kind of social world, up-to-date information, knowledge and skills are at a premium.

People themselves are the leading actors of knowledge societies. It is the human capacity to create and use knowledge effectively and intelligently, on a continually changing basis, that counts most. To develop this capacity to the full, people need to want and to be able to take their lives into their own hands – to become, in short, active citizens.¹² Education and training throughout life is the best way for everyone to meet the challenge of change.

3.2. A continuum of learning throughout life

The knowledge, skills and understanding we learn as children and as young people in the family, at school, during training and at college or university will not last a lifetime. Integrating learning more firmly into adult life is a very important part of putting lifelong learning into practice, but it is, nevertheless, just one part of the whole. Lifelong learning sees all learning as a seamless continuum 'from cradle to grave.' **High quality basic education for all, from a child's youngest days forward, is the essential foundation.** Basic education, followed by initial vocational education and training, should equip all young people with the new basic skills required in a knowledge-based economy. It should also ensure that they have 'learnt to learn' and that they have a positive attitude towards learning.

Education Forum held in Dakar in April 2000, 182 countries committed themselves to six goals to meet the basic learning needs of all. These goals include improving adult literacy rates levels and equitable access to basic and continuing education for all adults.

¹² Education for active citizenship in the European Union, OPOCE, Luxembourg, 1998.

People will only plan for consistent learning activities throughout their lives if they *want* to learn. They will not want to continue to learn if their experiences of learning in early life have been unsuccessful and personally negative. They will not want to carry on if appropriate learning opportunities are not practically accessible as far as timing, pace, location and affordability are concerned. They will not feel motivated to take part in learning whose content and methods do not take proper account of their cultural perspectives and life experiences. And they will not want to invest time, effort and money in further learning if the knowledge, skills and expertise they have already acquired are not recognised in tangible ways, whether for personal reasons or for getting ahead at work. Individual motivation to learn and a variety of learning opportunities are the ultimate keys to implementing lifelong learning successfully. It is essential to **raise the demand for learning as well as its supply**, most especially for those who have benefited least from education and training so far. Everyone should be able to follow open learning pathways of their own choice, rather than being obliged to follow predetermined routes to specific destinations. This means, quite simply, that education and training systems should adapt to individual needs and demands rather than the other way round.

There are three basic categories of purposeful learning activity.

- **Formal learning** takes place in education and training institutions, leading to recognised diplomas and qualifications.
- **Non-formal learning** takes place alongside the mainstream systems of education and training and does not typically lead to formalised certificates. Non-formal learning may be provided in the workplace and through the activities of civil society organisations and groups (such as in youth organisations, trades unions and political parties). It can also be provided through organisations or services that have been set up to complement formal systems (such as arts, music and sports classes or private tutoring to prepare for examinations).
- **Informal learning** is a natural accompaniment to everyday life. Unlike formal and non-formal learning, informal learning is not necessarily intentional learning, and so may well not be recognised even by individuals themselves as contributing to their knowledge and skills.

Until now, formal learning has dominated policy thinking, shaping the ways in which education and training are provided and colouring people's understandings of what counts as learning. The continuum of lifelong learning brings non-formal and informal learning more fully into the picture. Non-formal learning, by definition, stands outside schools, colleges, training centres and universities. It is not usually seen as 'real' learning, and nor do its outcomes have much currency value on the labour market. Non-formal learning is therefore typically undervalued.

But informal learning is likely to be missed out of the picture altogether, although it is the oldest form of learning and remains the mainstay of early childhood learning. The fact that microcomputer technology has established itself in homes before it has done so in schools underlines the importance of informal learning. Informal contexts provide an enormous learning reservoir and could be an important source of innovation for teaching and learning methods.

The term 'lifelong' learning draws attention to time: learning throughout life, either continuously or periodically. The newly-coined term 'lifewide' learning enriches the picture

by drawing attention to the spread of learning, which can take place across the full range of our lives at any one stage in our lives.¹³ **The ‘lifewide’ dimension brings the complementarity of formal, non-formal and informal learning into sharper focus.** It reminds us that useful and enjoyable learning can and does take place in the family, in leisure time, in community life and in daily worklife. Lifewide learning also makes us realise that teaching and learning are themselves roles and activities that can be changed and exchanged in different times and places.

However, lifelong learning is still defined in a variety of ways in different national contexts and for different purposes. The latest available policy reviews¹⁴ suggest that definitions remain largely informal and pragmatic, wedded more closely to action than to conceptual clarity or legal terms. The driving force that brought lifelong learning back onto policy agendas in the 1990s has been the concern to improve citizens’ employability and adaptability in the face of high levels of structural unemployment, hitting the poorest qualified hardest. The prospect of a sharply ageing European population means that the need for up-to-date knowledge and skills cannot be met by relying mainly on new entrants to the labour market, as happened in the past – there will be too few young people and the pace of technological change is too fast, particularly the accelerating shift to the digital economy.

Today, a noticeable shift towards more integrated policies that combine social and cultural objectives with the economic rationale for lifelong learning is taking place.¹⁵

New ideas about the balance of rights and responsibilities of citizens and public authorities have begun to take hold. More people have become more confident about claiming distinctive identities and ways of life. There is now widespread demand for decisions to be taken as close as possible to people’s daily lives, and with their greater participation. For these reasons, attention has turned to the need to modernise governance at all levels of European societies.¹⁶ At the same time, gaps have widened between the mainstream of social life and those who are at risk of long-term social exclusion. Education and training have become more important than ever before in influencing people’s chances of ‘getting in, getting on and getting up’ in life. The increasingly complex patterns of young people’s initial transitions between learning and working may be an indication of what lies in store for people of all ages in the future. Employability is obviously a key outcome of successful learning, but social inclusion rests on more than having paid work. Learning opens the door to building a satisfying and productive life, quite apart from a person’s employment status and prospects.

3.3. Working together to put lifelong learning into practice

Although comprehensive and coherent strategies have not yet been developed by the majority of Member States, all recognise that working together in **a variety of partnerships is an essential** means of putting lifelong learning into practice. These partnerships include co-operation between ministries and public authorities to develop co-ordinated policies. They systematically integrate **the Social Partners** in the development and implementation process,

¹³ For example, see: Lifelong Learning and Lifewide Learning, National Agency for Education, Stockholm, January 2000.

¹⁴ EURYDICE European Unit, The challenge of lifelong learning for the education systems of European Union Member States, Brussels, 2000; CEDEFOP, An Age of Learning, Thessaloniki, 2000; ECOTEC, The Contribution of Community Programmes, Funds and Initiatives to Lifelong Learning, Report to the European Commission, Education and Culture DG, August 2000.

¹⁵ Kearns, P. et al. VET in the learning age: the challenge of lifelong learning for all, Vol. 1, National Centre for Vocational Education Research (NCVER), Kensington Park, Australia, 1999, p. 25.

¹⁶ This includes the European level; a White Paper on European Governance will be published by the Commission in 2001.

in conjunction with public-private initiatives. Partnerships thrive, above all, through the active involvement of local and regional bodies and civil society organisations, who provide services that are close to the citizens and are better adapted to the specific needs of local communities.¹⁷ European Community education, training and youth programmes, for their part, have proved their worth in supporting transnational co-operation, partnership and exchange to develop good practice.

The continuum of lifelong *and* lifewide learning also means that the different levels and sectors of education and training systems, including non-formal domains, must work in close concertation with each other. Here, **working together effectively** will mean going beyond existing efforts to build bridges and pathways between different parts of existing systems. Creating a person-centred network of lifelong learning opportunity **introduces the vision of gradual osmosis between structures of provision** that remain, today, relatively disconnected from each other. Current debates in the Member States on the future of universities are an example of how policy thinking is beginning to grapple with the practical implications of this vision. Opening university studies to new and wider publics cannot be achieved unless higher education institutions themselves change – not only internally, but also in their relations with other ‘learning systems’.¹⁸ The vision of gradual osmosis brings a dual challenge: firstly, appreciating the complementarity of formal, non-formal and informal learning; secondly, developing open networks of opportunity and recognition between all three learning settings.

4. TAKING ACTION ON LIFELONG LEARNING: SIX KEY MESSAGES

4.1. Key Message 1: New basic skills for all

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

This is the essential foundation for active citizenship and employability in 21st century Europe. Economic and social change are modifying and upgrading the profile of basic skills that everyone should have as a minimum entitlement, enabling active participation in working life, family life and all levels of community life – from local through to European. The new basic skills included in the Lisbon European Council conclusions (paragraph 26) are IT skills, foreign languages, technological culture, entrepreneurship and social skills. This is not necessarily an exhaustive list, but it certainly covers key areas. Nor does the list imply that the traditional basic skills of literacy and numeracy are no longer important. But it is important to note that this is not a list of subjects or disciplines as we know them from our schooldays and beyond. It specifies broadly defined areas of knowledge and competence, all of which are interdisciplinary: learning foreign languages, for example, involves acquiring technical, cultural and aesthetic capacities for communication, performance and appreciation. General, vocational and social skills hence increasingly overlap in content and function.

As a starting-point for discussion, **this Memorandum defines new basic skills as those required for active participation in the knowledge society and economy** – in the labour

¹⁷ The European dimension of education: its nature, content and prospects. Information report, Economic and Social Committee, Section for Employment, Social Affairs and Citizenship, 13 June 2000 (SOC/019 final). See also the Committee of the Regions Opinion on Citizenship (accessible via: http://www.cor.eu.int/coratwork/avis_32plen/226-99/226-1999_EN.doc)

¹⁸ Responding to challenges for European Universities – Implementing changes in institutional and disciplinary co-operation, F2000 European Higher Education Forum, EUCEN (European Universities Continuing Education Network), Liege, July 2000.

market and at work, in real-time and in virtual communities and in a democracy, and as a person with a coherent sense of identity and direction in life. Some of these skills – such as digital literacy – are genuinely new, whereas others – such as foreign languages – are becoming more important for many more people than in the past. Social skills such as self-confidence, self-direction and risk-taking are also increasingly important, because people are expected to be able to behave much more autonomously than in the past. Entrepreneurial skills release capacities both to improve individual job performance and to diversify company activities; they also contribute to job creation, both within existing enterprises – especially SMEs – and for self-employment. Learning how to learn, to adapt to change and to make sense of vast information flows are now generic skills that everyone should acquire. Employers are increasingly demanding the ability to learn and acquire new skills rapidly and to adapt to new challenges and situations.

A solid command of these basic skills is crucial for everyone, but it is only the beginning of a continuum of learning throughout life. Today's labour markets demand ever-changing profiles of skills, qualifications and experience. Skills gaps and mismatches, particularly in ICT, are widely recognised as a significant reason why unemployment levels are persistently high in particular regions, industrial branches and for disadvantaged social groups. Those who have not been able, for whatever reason, to acquire the relevant basic skills threshold must be offered continuing opportunities to do so, however often they may have failed to succeed or to take up what has been offered so far. Member States' formal education and training systems – whether initial, further/higher or adult/continuing – are responsible for ensuring, as far as possible, that each and every individual acquires, updates and sustains an agreed skills threshold. Non-formal learning domains also have a very important role to play in these respects. This all requires the assurance of high quality learning experience and outcome for as many people as possible. It equally demands continuous review of basic skills reference levels, so that what is educationally provided matches what is economically and socially needed.

Questions for debate

- School and college curricula everywhere are already overloaded with ceaseless demands to incorporate new content and new skills. What can be done to relieve this pressure? What principles should inform curriculum organisation and content in the Knowledge Age?
- Can an individual right for all citizens to acquire and update skills through lifelong learning be envisaged?
- The eLearning initiative has set the target that, by 2003, all pupils leaving school should be digitally literate. What are the priority areas for action for those groups of citizens – young and old – on the wrong side of the emerging digital divide?
- How might a shared European framework for defining the new basic skills required for active participation in the knowledge society and economy be developed as proposed in paragraph 26 of the Lisbon conclusions?
- The proposal for Employment Guidelines 2001 (Guidelines 3, 4 and 6) calls on Member States to ensure that young people complete compulsory education and to improve adult access to learning, especially for older workers, those in part-time or temporary employment, and the unemployed. What kinds of measures would be appropriate and effective to achieve these aims as well as the aim of skills updating, more generally?

- What could be effective ways to monitor and meet new emerging skills needs – and prevent skills mismatches and recruitment difficulties – through lifelong learning provision in line with the proposal for Employment Guidelines 2001 (Guideline 7)? How can testing and self-assessment tools for basic skills be further developed?

4.2. Key Message 2: More investment in human resources

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

The Lisbon European Council conclusions set clear aims for all concerned to increase the annual per capita investment in human resources, and the Employment Guidelines (13, 14 and 16) invite Member States to set corresponding targets. This means not only that **current investment levels are regarded as too low to ensure the replenishment of the skills pool**, but that **it is necessary to re-think what counts as investment altogether**. Taxation regimes, accounting standards and company reporting and disclosure requirements in the Member States differ. For this reason alone, no single solutions are feasible – as in the case of treating company investment in human resources on an equal basis as capital investment. But neither would they be desirable: respect for diversity is the guiding principle of Community action. One way forward could be for Social Partners to establish framework agreements on lifelong learning generally, setting targets for continuing training (based on best practice) and introducing a European award for particularly progressive companies. There is equally a need to make investment in human resources more transparent.

At individual level, however, there is no doubt that incentive measures must be more fully developed. The idea of individual learning accounts is an example, by which people are encouraged to contribute to the cost of their own learning through special savings and deposits that attract matching or supplementary grants and benefits from public and private funding sources. Company schemes that give employees an amount of time or money to pursue learning of their own choice or agreed to be vocationally relevant is another example. In some Member States, rights to subsidised study leave have been negotiated for employees, and the unemployed, too, have rights to training opportunities. There are, furthermore, examples of companies that provide opportunities for employees on parental leave to participate in skills updating courses during their leave period or before they return to work again. As far as workplace-based or work-related learning is concerned, particular attention will have to be paid in the coming decade to those aged over 35. This is partly because demographic trends will increase the strategic importance of older employees. Participation in continuing education and training also currently falls off sharply for older workers, most especially for the less qualified and those in lower level jobs.

Employers have registered a rising demand to move to part-time contracts, not simply for family-related reasons but also in order to pursue further studies. This remains, in many cases, difficult to organise in practice, although levels of voluntary part-time working do vary markedly between Member States – room for exchange of good practice clearly exists. More generally, the **Social Partners have an important role** to play in negotiating agreements for co-funding of learning for employees and more flexible working arrangements that make participation in learning practically feasible. Investing in human resources is therefore also question of enabling people to manage their own 'time-life portfolios' and making a wider range of learning outcomes more visible for all concerned. Creative and innovative approaches to investing in human resources are an integral part of developing learning organisations.

Whatever the particular measures devised in individual Member States, industries, occupational sectors or individual companies, the important point is that raising investment in human resources requires moving towards a culture of shared responsibilities and towards clear co-financing arrangements for participation in lifelong learning.

Questions for debate

- How can investment in learning be made more tangible and transparent for the individual and for the employer or enterprise, in particular by strengthening financial incentives and removing disincentives? What are promising ways to encourage and enable individuals to co-fund and take control of their own learning (for example, through individual learning accounts or competence insurance schemes)?
- A concerted research-based initiative in the Member States and at Community level could help to clarify the social and economic benefits of investing in lifelong learning, including developing more transparent input and output measures. Is there sufficient collective will to do so, and how might this initiative be best launched and carried through?
- How could the Structural Funds, and in particular the European Social Fund, be effectively used to target investment in the infrastructure of lifelong learning, most particularly for establishing local learning centres and installing up-to-date ICT equipment? To what extent can these resources and measures help to ensure that the quality of publicly-funded education and training does not fall behind that of privately-funded alternatives?
- In what kinds of ways do progressive employers provide time and flexibility for taking part in lifelong learning, including arrangements that assist parents and carers to fit learning with their family as well as work responsibilities? How can best practice be made more accessible to enterprises throughout Europe? How might government and public service employers become effective models of good practice in these respects?

4.3. Key Message 3: Innovation in teaching and learning

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

As we move into the Knowledge Age, our understandings of what learning is, where and how it takes place, and for what kinds of purposes, are changing. We increasingly expect teaching and learning methods and contexts to recognise and adapt to a highly diverse range of interests, needs and demands, not only of individuals but also of specific interest groups in multicultural European societies. This implies **a major shift towards user-oriented learning systems with permeable boundaries across sectors and levels**. Enabling individuals to become active learners implies both improving existing practices and developing new and varied approaches to take advantage of the opportunities offered by ICT and by the full range of learning contexts.

Quality of learning experience and outcome is the touchstone, including in the eyes of learners themselves. But little effective change and innovation can take place without the active involvement of professionals in the field, who are closest to the citizen as learner and are most familiar with the diversity of learning needs and processes. **ICT-based learning technologies offer great potential** for innovation in teaching and learning methods, although practising educationalists insist that, to be fully effective, these must be embedded in 'real time' contexts and relationships between teachers and learners. New methods must also take

account of the changing roles of tutors and teachers who are separated from their students by distance and time.¹⁹ Furthermore, **most of what our education and training systems offer is still organised and taught as if the traditional ways of planning and organising one's life had not changed for at least half a century.** Learning systems must adapt to the changing ways in which people live and learn their lives today. This is especially important for achieving gender equality and catering to an increasingly active 'Third Age' citizenry. We still know and share too little, for example, about how to generate productive self-directed learning, whilst remembering that learning is ultimately a social process; how senior citizens best learn; how to adjust learning environments to enable integration of the disabled; or what the potential for mixed-age learning groups could be for cognitive, practical and social skills development.

Improving the quality of teaching and learning methods and contexts will mean significant investment by Member States to adapt, upgrade and sustain the skills of those working in formal and non-formal learning environments, whether as paid professionals, as volunteers or as those for whom teaching activities are a secondary or ancillary function (for example, experienced skilled tradespeople in the workplace or community development workers). Education and training practitioners work in a wide variety of establishments and with very different kinds of learners. Quite often, the fact that their work has to do with teaching and learning goes unrecognised – including by themselves, as in the case, for example, of those working in youth organisations.²⁰ This all means, above all, thoroughgoing review and reform of initial and in-service teacher training, so that it genuinely caters to the full range of learning contexts and target groups.

Teaching as a professional role faces decisive change in the coming decades: **teachers and trainers become guides, mentors and mediators.** Their role – and it is a crucially important one – is to help and support learners who, as far as possible, take charge of their own learning. The capacity and the confidence to develop and practise open and participatory teaching and learning methods should therefore become an essential professional skill for educators and trainers, in both formal and non-formal settings. Active learning presupposes the motivation to learn, the capacity to exercise critical judgement and the skill of knowing how to learn. The irreplaceable heart of the teaching role lies in nurturing precisely these human capacities to create and use knowledge.

Questions for debate

- How can the development of ICT-based pedagogies be effectively combined with the search for improvement and innovation in human-based pedagogies? How can technical specialists and teachers/trainers work together more effectively to produce quality learning materials and resources? Given the growing scale of commercially-produced learning materials and resources, how can their quality and appropriate use be best monitored, including through co-operation at European level?
- What would be the best way to monitor and analyse the outcomes of transnational projects with a view to producing a report on effective lifelong learning methods for specified contexts, purposes and types of learner? What are the prospects for developing meaningful qualitative benchmarks drawing on comparative case-studies in this area?

¹⁹ For example, see Study Circles in Targeted Intelligence Networks, JRC/IPTS, Sevilla, 2000.

²⁰ Lifelong Learning – A Youth Perspective, European Youth Forum/Free University of Brussels, Brussels, December 1997.

- Training courses and qualifications for education and training practitioners working in non-formal sectors (such as youth and community work), in adult education or in continuing training are underdeveloped everywhere in Europe. What can be done to improve this situation, including through European co-operation?
- What should be the priority themes for applied educational research in the Member States and at Community level in the coming decade? How can the added value of research effort be raised through greater transnational co-operation and exchange? What could be done to support action research in education more effectively, which works closely with practitioners themselves but which is frequently undervalued in the research community?

4.4. Key Message 4: Valuing learning

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

In the knowledge economy, developing and using human resources to the full is a decisive factor in maintaining competitiveness. In this context, diplomas, certificates and qualifications are an important reference point for employers and individuals alike on the labour market and in the enterprise. The rising demand for qualified labour by employers and increased competition between individuals to gain and keep employment is leading to **much higher demand for recognised learning than ever before**. How best to modernise national certification systems and practices for new economic and social conditions has become an important policy and professional issue in all parts of the Union.

Education and training systems provide a service to individuals, to employers and to civil society as a whole. Ensuring that learning is visibly and appropriately recognised is an integral element of the quality of service that is provided. For an integrated Europe, both an open labour market and citizens' rights to free movement to live, study, train and work in all Member States demand that knowledge, skills and qualifications are both more readily understandable and more practically 'portable' within the Union. Valuable progress has been achieved in transparency and mutual recognition agreements, especially in the higher education sector and for regulated professional and technical occupations.

There is broad consensus, however, that we need to do much more in this area for the benefit of much wider segments of the population and the labour market. Explicit recognition – in whatever form – is an effective means to motivate 'non-traditional learners' as well as those who have not been active in the labour force for some time due to unemployment, family responsibilities or illness. Innovative forms of certification for non-formal learning are also important for widening the recognition spectrum altogether, regardless of the type of learner at hand.

It is absolutely essential to develop high quality systems for the Accreditation of Prior and Experiential Learning (APEL), and to promote their application in a wide variety of contexts. Employers and admissions tutors in education and training institutions also need to be persuaded of the worth of this kind of certification. APEL systems evaluate and recognise individuals' existing knowledge, skills and experience gained over long periods and in diverse contexts, including in non-formal and informal settings. The methods used can uncover skills and competencies that individuals themselves may not have realised they possess and can offer to employers. The very process requires the active participation of the candidate, which in itself raises individuals' confidence and self-image.

Diverse national terminology and underlying cultural assumptions continue to render transparency and mutual recognition a hazardous and delicate exercise. In this area, recourse to technical expertise in designing and operating reliable and valid recognition systems is essential. This must be accompanied by **greater involvement of those who ultimately validate credentials in practice** and who are closely familiar with the ways in which individuals and enterprises use credentials in everyday life. The Social Partners and relevant NGOs are therefore no less important than are official authorities and professional educators.

Questions for debate

- Innovative forms of assessment and recognition are a priority area for action. What needs to be done to establish working APEL-type systems in all Member States? In what ways might systematic information on their use and acceptability be developed and exchanged between countries? How can appropriate systems be developed to recognise competencies gained in non-formal and informal contexts, such as youth and community associations?
- With the support of the Community education, training and youth programmes, a number of assessment and recognition instruments have been co-operatively developed. These include ECTS (European Credit Transfer Scheme) and the European Diploma Supplement (in the higher education sector), EUROPASS (recognition for work-linked training), the EVS certificate (participation in the European Voluntary Service scheme), the ECDL (European Computer Driving Licence) and various automated self-assessment tools (European pilot projects). A European diploma for basic IT skills will be developed through the eLearning initiative. How can these various instruments be extended and developed in coherent ways? What scope might there be for a broad credit-based initiative linked to the development of a common format for a 'European cv' as proposed in paragraph 26 of the Lisbon conclusions?
- The proposal for Employment Guidelines 2001 (Guideline 4) calls on Member States to improve the recognition of knowledge, qualifications and skills to facilitate mobility and lifelong learning. What measures should be undertaken to do so? How might the existing European Forum on the Transparency of Qualifications²¹ be developed in service of these aims, and what kinds of similar initiatives could enhance the development of common approaches and the dissemination of good practices for assessing and recognising competencies?
- How can communication and dialogue between the Social Partners, enterprises and professional associations be improved in order to raise mutual confidence in the validity and utility of more diverse forms of recognition?

4.5. Key Message 5: Rethinking guidance and counselling

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

In the past, moving between education, training and the labour market happened only once in most people's lives – as young people, leaving school or university to find a job, perhaps with one or more periods of vocational training in between. Today, we may all need information and advice on 'what to do next' at several times in our lives, and perhaps quite unpredictably. This is an integral part of planning and carrying through a life project as an ongoing process,

²¹ This Forum was set up as a joint initiative by the European Commission and CEDEFOP.

in which paid work is but one component, however important that might be. Weighing up the options and making decisions certainly demands relevant and accurate information, but professional advice can frequently help to clarify one's mind.

In this context, a new approach is needed which envisages **guidance as a continuously accessible service for all**, and which overcomes the distinction between educational, vocational and personal guidance, and which reaches out to new publics. Living and working in the knowledge society calls for active citizens who are self-motivated to pursue their own personal and professional development. This means that systems of provision must shift from a supply-side to a demand-side approach, placing users' needs and demands at the centre of concern.

The practitioner's task is to accompany individuals on their unique journey through life, by releasing motivation, providing relevant information and facilitating decisionmaking. This includes developing a more proactive approach – that is, reaching out towards people rather than simply waiting for them to come for advice, and following up on progress made. It also includes taking positive action to prevent and recoup failure to learn and drop-out from education and training courses.

The future role of guidance and counselling professionals could be described as 'brokerage'. With the client's interests in the forefront, the 'guidance broker' is able to call on and tailor a wide range of information in order to help decide on the best course of action for the future. ICT/Internet-based sources of information and diagnostic tools open up new horizons for improving the range and the quality of guidance and counselling services. They can enrich and extend the professional role, but clearly cannot replace it – and the new technologies bring new potential problems to resolve. For example, guidance and counselling practitioners will have to develop high-level capacities for information management and analysis. They will be called upon to assist people to find their way through the information labyrinth, helping them to search out what is meaningful and useful for their own needs. In a globalised universe of learning provision, people will also need guidance on the quality of what is on offer.

For all these reasons, guidance and counselling services must move towards more 'holistic' styles of provision, able to address a range of needs and demands and a variety of publics. It is self-evident that such **services must be locally accessible**. Practitioners must be familiar with the personal and social circumstances of those for whom information and advice is provided, but must equally know the profile of the local labour market and employers' needs. Guidance and counselling services also need to be linked more firmly into networks of related personal, social and educational services. This would enable the pooling of specific expertises, experiences and resources.

In recent years, it has also been increasingly recognised that a good deal of information and advice is sought and found through non-formal and informal channels. Professional guidance and counselling services are beginning to take these factors into account, not only by developing networks with local associations and voluntary groups but also by designing 'low threshold' services in familiar settings. These are important strategies for improving access for highly disadvantaged target groups.

Traditionally, guidance and counselling have been provided as public services and were originally designed to accompany initial transitions between school and the labour market. Over the past thirty years, market-based services have mushroomed, especially for the highly qualified. In some Member States, many guidance and counselling services are wholly or

partially privatised. Companies themselves have also begun to invest in guidance services for their employees. Nevertheless, **it remains the responsibility of the public sector to set agreed minimum quality standards and to define entitlements.**

Questions for debate

- How can existing initiatives²² and services be enhanced so that guidance and counselling becomes an integral part of an open Europe? What improvements are needed to provide interconnected European databases on learning opportunities throughout life?²³ What are the implications of emerging ‘borderless education’ – that is, learning provided in one country and accessed from another – for guidance and counselling services?
- The eLearning initiative proposes that, by the end of 2002, vocational guidance and counselling services should offer universal access to information on training, labour market and career opportunities in ‘new technology’ skills and occupations. How can this target be achieved? More generally, how can further impetus be given to the development of Internet-based tools for self-guidance?
- What can be done to modernise and improve initial and in-service training and professional development for guidance and counselling practitioners? Where are the most urgent needs for enriched training? What kinds of projects in this field should be prioritised under the SOCRATES II, LEONARDO II and YOUTH programmes?
- There is a clear need to expand service provision at local level, in accessible forms and designed for specific target groups. How can innovative approaches – such as ‘one-stop-shops’ – be applied more widely across Europe? What is the role of marketing strategies in guidance and counselling, and how might they be made more effective? How can inter-agency networks be developed that enable local-level providers, via a pool of specialist sources, to offer genuinely ‘tailored’ services on an individualised basis?
- How can quality of service be best assured in a mixed public and private market for guidance and counselling? Would it be appropriate to develop quality guidelines for guidance and counselling services, including through co-operation at European level?

4.6. Key Message 6: Bringing learning closer to home

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

Regional and local levels of governance have become increasingly influential in recent years in line with intensified demand for decisionmaking and services ‘close to the ground’. The provision of education and training is one of the policy areas destined to be part of this trend – **for most people**, from childhood through to old age, **learning happens locally**. Local and regional authorities are also the ones that provide the infrastructure of access to lifelong learning, including childcare, transport and social welfare services. Mobilising the resources of regional and local authorities in support of lifelong learning is therefore essential. Equally, civil society organisations and associations have their strongest roots at local level, and

²² For example, the Euroguidance network of National Resources Centres for Vocational Guidance, the FEDORA (European Forum for Student Guidance) network, the EURES system and the Internet-based Gateway to the European Learning Area are already established or underway.

²³ For 2001, Employment Guideline 7 seeks to enhance the functioning of labour markets by improving interconnected European databases on jobs and learning opportunities.

typically possess vast reservoirs of knowledge and experience about the communities of which they are part.

Cultural diversity is Europe's distinctive trademark. Particular localities may have different characteristics and problems, but they all share a unique distinctiveness of place and identity. The familiar distinctiveness of people's home community and region gives confidence and provides social networks. These resources are important for lending meaning to learning and for supporting positive learning outcomes.

Varied and locally accessible lifelong learning opportunities helps to ensure that people are not *compelled* to leave their home region to study and train – although they should equally be able to choose to do so, and the experience of such mobility should be a positive learning experience in itself. For some groups, such as the disabled, it is just not always possible to be physically mobile. In such cases, equal access to learning can only be achieved by bringing learning to the learners themselves. **ICT offers great potential for reaching scattered and isolated populations** in cost-effective ways – not only for learning itself, but also for communication that serves to maintain community identity across large distances. More generally, 'round-the-clock' and 'on-the-move' access to learning services – including on-line learning - enables everyone to use their learning time to best advantage, wherever they may physically be at a given moment.

Densely populated urban areas, for their part, can weld multiple partnerships from a hub of diversity, using **lifelong learning as the driver for local and regional regeneration**. The city, meeting-point of constantly changing groups and ideas, has always been a magnet for innovation and debate. Urban environments brim over with learning opportunities of all kinds, from everyday street life to fast-paced enterprises and for young and old alike. Villages, towns and cities have also already built up a range of contacts with partner communities across Europe through town-twinning programmes and activities, many of which are supported with Community funding. These activities provide a basis for transnational co-operation and exchange between communities and localities that have a range of similar characteristics and problems to resolve, and which therefore offer a natural platform of interest for non-formal learning initiatives. ICT expands these opportunities by creating the possibility for virtual communication between local communities physically far apart.

Inclusive partnerships and integrated approaches are better able to reach (potential) learners and respond coherently to their learning needs and demands. Incentive schemes and other support measures can encourage and support a proactive approach to lifelong learning both by individuals themselves and by cities and regions as co-ordinating contexts. Bringing learning closer to home will also require reorganisation and redeployment of resources to create appropriate kinds of **learning centres in everyday locations** where people gather – not only in schools themselves, but also, for example, in village halls and shopping malls, libraries and museums, places of worship, parks and public squares, train and bus stations, health centres and leisure complexes, and workplace canteens.

Questions for debate

- The Lisbon European Council conclusions (paragraph 26) propose turning schools and training centres into multi-purpose local learning centres, all linked to the Internet and accessible to people of all ages. This is a major challenge for all Member States. What kinds of projects and provision already exist that could offer promising ways forward and examples of good practice? What kinds of pilot projects should the Community education, training and youth programmes support to this end?

- How can mutually beneficial learning partnerships between education and training providers, youth clubs and associations, enterprises and R&D centres be profitably developed at local and regional levels? Have locally-organised audits of citizens' learning needs and employers' skills needs proved a positive tool for re-designing lifelong learning opportunities in particular communities and regions?
- The Lisbon European Council conclusions (paragraph 38) strongly favour decentralised and partnership-based implementation strategies. What kinds of incentives will encourage local and regional initiatives – such as learning cities and regions – to co-operate and exchange good practice at multiple levels, including the transnational level? Could local and regional authorities pledge a fixed percentage of their income to lifelong learning?
- What scope is there for promoting decentralised lifelong learning partnerships through developing closer links between European-level institutions (European Parliament, Committee of the Regions, Economic and Social Committee, Council of Europe) that have well-established local and regional links?

5. MOBILISING RESOURCES FOR LIFELONG LEARNING

The debate to be launched through this Memorandum will take place at a crucial point in time for implementing the Lisbon European Council conclusions. The outcomes of the debate will help to define priorities and directions under the relevant Community instruments and programmes. **The new open method of co-ordination will enable a coherent policy development and mobilisation of resources at European and Member State levels in favour of lifelong learning.** At Community level, indicators and policy initiatives are being developed and resources will be mobilised.

Developing indicators and benchmarks

The question of setting appropriate targets and meaningful benchmarks in relation to lifelong learning will be an important aspect of the coming debate, in conformity with the open co-ordination method introduced in the Lisbon conclusions (paragraph 37) and with the methods already used within the Employment Strategy. **Indicators that reflect the full meaning of lifelong learning as defined in this Memorandum are not presently available.** Work has already begun at European level to consider how this can be improved²⁴ and the Education Council has begun to consider how the idea of benchmarking can be applied to the education field whilst preserving the autonomy of the Member States in this policy domain.²⁵ Moreover, a number of indicators on lifelong learning have been specified and used in assessing progress in the implementation of the Employment Guidelines, some of which were considered for inclusion in the list of structural indicators proposed by the Commission for the Annual Synthesis Report.²⁶ A joint effort between Community and Member States is needed, both to develop data relating to the six key messages and to define appropriate quantitative and

²⁴ Indicators concerning teaching and learning in the Information Society are proposed in the Educational Multimedia Report, January 2000 (accessible via: http://europa.eu.int/eur-lex/en/com/pdf/2000/com_2000_0023en0.pdf); 16 quality indicators are proposed in the European Report on the Quality of School Education, May 2000; the Eurostat Task Force on Measuring Lifelong Learning delivers its first report in December 2000; the eLearning initiative plans to develop specific indicators in relation to the Lisbon targets on digital infrastructure and literacy. Annex 2 of this Memorandum considers the current scope for developing and improving European comparative statistics and indicators on lifelong learning.

²⁵ Leiden Seminar on Benchmarking and Open Co-ordination, 27-28 September 2000.

²⁶ Structural Indicators, Communication from the Commission, COM(2000)594, 27 September 2000.

qualitative indicators on lifelong learning, some of which are likely to be new and may well require a new evidential base. (This issue is further dealt with in Annex II – The scope for developing indicators and benchmarks on lifelong learning.)

Current targeted initiatives at European level

At Community level, action is already underway to implement the Lisbon European Council's conclusions (paragraphs 11, 25, 26, 29, 37, 38 and 41).

- The Education Council is currently preparing, in co-operation with the Commission, a first **report on** the common concerns and priorities of **Europe's education systems** in the future, including lifelong learning. This report will be presented to the European Council in Spring 2001 under the Swedish Presidency.
- The new **eLearning initiative, which is part of the broader eEurope initiative**,²⁷ aims to raise levels of digital literacy and equip schools, teachers and pupils with the necessary material, professional skills and technical support to do so. The effective use of ICT will make a significant contribution to implementing lifelong learning by widening access and introducing more varied ways to learn, including through ICT-networked local learning centres open to a wide range of people of all ages.
- A **Gateway to the European Learning Area** is being developed which, together with the EURES database, is intended to provide easy access for citizens to information about jobs and learning opportunities throughout Europe.
- To facilitate mobility and increase the visibility of learning and work experiences, the Commission will make a proposal for developing a common **European curriculum vitae (CV)** format.²⁸
- The Commission has presented a proposal for a **Recommendation to promote mobility**. As an operational complement to this Recommendation, an **Action Plan for Mobility** is being developed on the initiative of the French Presidency.
- The Commission will also continue to work together with established networks and decentralised agencies and within existing mechanisms to develop lifelong learning, such as the **European Forum on the Transparency of Qualifications**.
- The continued implementation of the **Action Plan to promote Entrepreneurship and Competitiveness (BEST)**, which includes actions on education and training for entrepreneurship.

The action programmes SOCRATES II, LEONARDO DA VINCI II and YOUTH

Lifelong learning is the guiding principle for the new Community education, training and youth action programmes, which came into effect in January 2000. The activities they will be funding – networks and partnerships, pilot projects and action research, exchange and mobility activities, Community sources of reference – are therefore prime tools for

²⁷ [eLearning – Designing tomorrow's education](http://europa.eu.int/comm/information_society/eeurope/documentation/index_en.htm), Communication from the Commission of the European Communities, COM(2000)318 final, 24 May 2000. For key documentation concerning eEurope see http://europa.eu.int/comm/information_society/eeurope/documentation/index_en.htm

²⁸ Lisbon European Council conclusions, paragraph 26

developing the European dimension of lifelong learning. The Memorandum's key messages provide the basis for determining priorities in the regular calls for project proposals. The new programmes also provide for joint actions – that is, funded activities of interests and concern to a number of Community action domains. This is of particular interest for lifelong learning, given its cross-sectoral and integrative nature. For example, joint actions could be envisaged for promoting: co-operation between practitioners working in different education and training sectors or in formal and non-formal learning settings, in order to develop innovative teaching and learning methods; co-operation between different kinds of guidance and counselling provision, in order to bridge the gaps between services and encourage multi-specialist networks.

Employment guidelines and recommendations

The Employment Guidelines are proving **an effective framework for promoting structural reforms, setting targets and monitoring progress** in implementing policy initiatives, including in the field of lifelong learning. In the Commission's Proposal for Employment Guidelines 2001, the lifelong learning element has been considerably strengthened. Lifelong learning is now seen as a horizontal aspect of the Employment Strategy, as well as being addressed under several guidelines. All Member States will have to develop policies to implement the new Employment Guidelines for 2001. Most Member States will need to respond to specific policy recommendations in implementing the guidelines on lifelong learning.

Member States have still to develop comprehensive strategies for lifelong learning, which would enable coherent design and implementation of a co-ordinated range of policy measures capable of making lifelong learning a reality for all citizens. The draft European Employment Guidelines 2001 call on Member States to develop comprehensive and coherent strategies for lifelong learning across the full range of their education and training systems. They are also asked to set national targets for increasing investment in human resources and for participation in further education and training, and to monitor progress in achieving these targets.

As these strategies are being developed, partnership-based and decentralised approaches which bring learning 'closer to home' will take on an important role, as the Lisbon Summit conclusions have underlined. The challenge will be to **create and maintain coherence within diversity** at all levels of community life in Europe.

Using the European Structural Funds

The Lisbon European Council conclusions (paragraph 41) underline the need to mobilise the necessary resources, with the European Union acting as a catalyst and adding its own contribution under existing Community policies.

The European Social Fund now has a specific mission to contribute to the actions taken in pursuance of the European Employment Strategy and the Guidelines on Employment. Member States should be vigorously pursuing the development of lifelong learning policies and infrastructure at national, regional and local levels. The new Community initiative EQUAL will address the relevant themes for action in the context of the Employment Strategy, including lifelong learning. There also seems to be **considerable scope for strengthening the links between Youth, Socrates, Leonardo da Vinci and EQUAL, on the one hand, and the Structural Funds, on the other** – in particular in terms of utilising

successful approaches and project results developed under these programmes on a broader basis.

Using the Research Framework Programme

Research relevant to the key messages should be prioritised within the current 5th Framework Programme and taken into account when planning the priorities of the 6th Framework Programme; national research programmes should equally consider prioritising research relevant to implementing lifelong learning. Topics could include, for example, the social and economic benefits of investing in lifelong learning and applied educational research to develop innovative methods of teaching and learning. Under the 5th Framework Programme, one of the key actions under the theme of the user-friendly Information Society already aims to facilitate lifelong learning through the development of multimedia tools and contents.

Follow-up to the Memorandum

The Commission invites the Member States, between now and mid-2001, to launch a consultation process on this Memorandum, close to the citizens and involving the key actors responsible for lifelong learning at all levels. The Commission will collect and analyse the outcomes of these discussions and will also consult the European Parliament, the Economic and Social Committee, the Committee of the Regions, the Social Partners and other key partners to get feedback on this Memorandum. In addition, the Commission will continue its work on developing indicators and benchmarks and identifying examples of good practice. It will also mobilise Community resources for lifelong learning, as discussed above. Finally, the Commission will prepare a report on the outcome of this consultation process by the Autumn of 2001 with a view to proposing specific objectives, concrete points for action and benchmarks for implementing a lifelong learning strategy.

ANNEX I

Examples of lifelong learning good practice

This annex presents a small number of examples of “good practice”, i.e., projects or initiatives that have shown a feasible approach towards putting lifelong learning into practice. Projects have been selected from within the European Union – most of which have received Community funding. There are also examples from countries outside Europe which may, in many cases, face similar challenges when it comes to implementing lifelong learning. The selection has been made based on proposals received from CEDEFOP, EURYDICE, the European Training Foundation (ETF) and a study commissioned by the European Commission on the contribution of Community funding to lifelong learning. Most of the examples from within Europe have a clear European dimension, and all of the examples illustrate innovative and flexible approaches for the citizens and other partners to putting lifelong learning into practice. Several initiatives have already been in place for a number of years and there is evidence that they are effective. In other cases, there is not yet firm evidence of the success of the projects, but the example has nevertheless been included since it points to an innovative or interesting approach. The list is far from exhaustive. The objective is primarily to illustrate, in fairly concrete terms, what lifelong learning can mean and to stimulate the debate and search for new ideas and methods – inside and outside Europe. Identifying good examples and proposing ideas for disseminating good practice will, it is hoped, be an important aspect of the debate launched by this Memorandum.

Objective 1:

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

Sweden

The Adult Education Initiative (AEI)

Implementation: July 1997- July 2002

Target group: adults

The AEI is primarily aimed at adults who are unemployed or who lack full three-year upper secondary qualifications. The idea is that those adults most in need of education should be given a chance to catch up and add to their knowledge. Improved levels of skill and increased self- confidence will help them to strengthen their position in the labour market. The overriding aims of the AEI are to:

- reduce unemployment
- develop adult education
- reduce educational divisions
- promote growth

The intention is for all education that takes place under the initiative to be governed in form and content by the needs, wishes and capacity of the individual. Every individual should have ample scope for personal choice in terms of the type of study they require and the timing and location of that study. Validation of competence may allow students to shorten the time they spend in study

Transnational

YOUTHSTART project – Gemeente Groningen

Implementation: started in November 1995, still running

Target group: young people

Sources of co- funding: YOUTHSTART, Central Government, Private companies in Groningen The Netherlands

Main promoter: The Stin Postbus and partners in Ireland and Austria

The ability to use information technologies and the enhancement of personal skills are thought to be key factors in finding a job in the Netherlands.

This project is closely related to the national objectives of LLL in the Netherlands, which place a high priority on the development of ICT skills and the use of innovative pedagogies. It is also coherent with the European Commission definition of LLL

The project has been replicated in other northern provinces of the Netherlands. The participation of SMEs has been a key factor for the sustainability of the project

The courses included a combination of training in core skills and in personal skills. The latter included topics such as self-esteem, how to behave in an interview, how to answer a phone, how to work in groups, etc. This combination seems appropriate for the target group of beneficiaries (young people in unemployment), as they tend to be inexperienced in those matters

Objective 2:

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

**European
ADAPT project EU Jobrotation**

Target group: Individual employees, groups of employees, a department of a company or branch of industry and unemployed

Implementation: Started in Denmark in the 90's and is still running, piloted in ten other Member States through ADAPT

The starting point for JobRotation lies within businesses and their training needs resulting from the introduction of new technology, organisational changes or internationalisation processes. The principle of a JobRotation scheme is simple: the employed participate in supplementary training, while an unemployed person trained for the temporary job takes over as a substitute. In 1999 an estimated 5311 people and 622 companies will be participating in JobRotation projects all over Europe. The flexibility of the JobRotation tool has made it possible to tailor it to the national and/or regional framework and to the unique local situation. When the employment effect for substitutes is considered, the results from all European regions indicate that approximately 75% of substitutes obtain employment after completing the period of replacement, either in the JobRotation enterprise or in another company

**United Kingdom
Investors in people**

Implemented in 1991, still running

Investors in People was introduced in the UK in 1991 and has since proved an important initiative in recognising those enterprises which invest in training for their employees. The programme provides employers with a national standard of training needs analysis and those companies wishing to be recognised as an Investor in People must conform to this standard. It helps to maximise business performance by linking the training and development of employees to an organisation's business objectives. The standard is based on four main principles:

- Senior management makes a commitment to develop all employees to achieve business objectives;
- The employer regularly reviews its business objectives and plans how to achieve them by developing the skills of the individual employees and the teams;
- The employer trains and develops individuals from the time when they are recruited and throughout their employment
- The employer evaluates the investment in training and development and assesses the impact of the training on improved effectiveness

Investors in People is also being launched in the Netherlands, promoted by the Dutch initiative on lifelong learning and the National Action Plan for employment

Objective 3 :

Develop effective teaching and learning methods and contexts for the continuum of lifelong learning

**Transnational
Socrates project: MIWEUL- Making it work: European Universities and LLL**

Implementation: 1997- 1999

This transnational project was funded under the Adult Education action of the Socrates programme and involved collaboration and comparative research between researchers from 4

EU Member States. The project aimed at developing a network of research centres in order to identify what is needed to enhance the contribution of education and training policies and practices to LLL.

Therefore, the project has focused on the following aspects:

- Analysis of the development of higher education institutions as centres for lifelong learning in four European countries
- Focus on policy formulation, orientation of LLL (especially access to education and needs of adult learners) and barriers to future development
- Identification of commonalities and differences between European countries regarding LLL
- Promotion of policy change at regional, national and European levels by contributing to the understanding of what is happening at national and institutional levels
- Promotion of the European dimension and mutual understanding around LLL.

As part of this research project, a comprehensive view has been adopted covering the context of the lifelong dimension of higher education (HE), the types of policies implemented at national level. A significant contribution to the development of LLL in higher education relates to pointing out the extent to which higher education institutions, in partnership with business, regional and local authority groups and groups in the community, can widen participation and access to education and training to non traditional learners, including through the use of ICT

European European Network of Innovative Schools (ENIS)

Target group: learning institutions

As a component of the EUN (Schoolnet) structure the overall goal of ENIS is to create a network of innovative schools which can be utilised for full demonstration of pilot projects in EUN and beyond. The complete network consists of approx. 500 schools with broad European representation, and will constitute a common integrated framework in terms of: Connectivity and technical infrastructure, pedagogical and organisational tools, pedagogical and organisational methodology and skills and knowledge

The network comprises schools with proper ICT-equipment and experience of using it. A process is underway in each of the EUN member countries to appoint the most innovative schools. Each ENIS school will complete and submit a form, which will be evaluated by the national authorities. Key benefits and expectations for Innovative schools:

Access to the full EUN-WEB site at the Internet. Including access to use:

- Collaborative applications
- Communication platform
- Educational material and tools developed by EUN work programmes.

Objective 4:

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

USA

Prior Learning Assessment

Implemented: 1994, still running

PONSI – Project on Noncollegiate Sponsored Instruction and Credit – was the first scheme introduced by the New York State University’s Board of Regents, following a pilot study carried out in 1974. Since 1994, it works in cooperation with California State University and recognises courses from all over the country. In 1999, 1400 universities and academies accepted PONSI recognised certificates. College Credit Recommendation System (Credit) was introduced at the same time by the American Council for Education, Washington DC, which is an umbrella organisation representing all accredited universities and academies in the US.

Three types of approach to PLA are prevalent: tests, evaluation of non-college-sponsored training, and comprehensive assessment of life and work experiences by portfolio assessment.

Portfolio assessment is considered to be the only method which helps adult learners evaluate their own prior learning and build on it to develop plans for their future learning and development. It is a more holistic approach in that it focuses on the identification and articulation of learning as well as its measurement and evaluation.

The portfolio is a formal document outlining non-college learning experiences and is used to request college recognition of experiential learning.

All of these measures point towards the acceptance and implementation of lifelong learning as part of modern life. They lead towards a mainstreaming of post-school learning. However, it is difficult to find evidence of how PLA affects progression and development at work, independent of academic advancement (Mann, 1997). This is therefore an interesting area in need of more research and examination, given that many other countries look to the US as a leader in this field

France

Bilan des compétences

Implemented: 1985, still running

Target groups: individuals and enterprises

The initiative may come from the enterprise or from the worker him/herself. The aim is to permit the employee to understand his or her professional and personal competences as well as their motivation and aptitudes in order to facilitate their professional as well as their educational plans and careers. The bilan des compétences is a national system defined and administered according to national law. It is focused on the labour market and on enterprises. The idea is to give feedback to the employer or employee on questions of competence to support further learning or career development. The bilan des compétences does not aim at formal recognition of competences according to a qualification standard. The main reference points are individuals and enterprises.

Objective 5:

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

Transnational

Leonardo da Vinci project: EURO PRO-FILES (Development of a multimedia software program for guidance)

Target group: young people

The project is financed by Leonardo da Vinci and the aim is to design and produce a multimedia software program, which develops vocational guidance systems for young people. The multimedia nature of the tool allows a comparison of occupational profiles and promotes the vocational training of young people and the development of guidance systems.

The project facilitates exchanges in the field of vocational training at European level, since the CD-ROM provides a database on the skill profiles to be acquired for the chosen occupations and the corresponding training. This tool ultimately fosters youth mobility and blurs cultural, vocational and training divides.

The impact on national guidance systems has been very positive. The project allows a careers advisory service provider to respond to requests for information from young people about occupational profiles on a truly transnational basis. The advice can be tailored exactly to the requirements of the trainee and will aid them in making an informed decision about transnational mobility

Canada

SkillNet.ca

Implemented: 1993

SkillsNet.ca is Canada's fastest growing network of job and career information Web sites. A one-stop shopping site for jobs and career-related information, SkillNet.ca is a partnership of integrated recruitment services, developed by Industry Canada, with assistance from Human Resources Development Canada and Xwave Solutions. These include colleges and universities, health, arts & culture, education, aviation maintenance and the voluntary sector. Many more partner sites are under development. CANARIE Inc. is Canada's advanced Internet development organisation. It was established in 1993 and has been working with government, industry, and the research and educational communities to enhance Canada's advanced Internet infrastructure, applications development and use.

Objective 6:

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

Transnational

ADAPT project: SES-NET (South East Scotland Network for Education and training)

Implemented: September 1998- June 2001, ADAPT programme

Target groups: The target group for project activity are SMEs in a range of sectors including distribution and retail, multi-media, tourism and automotive

University for Industry was created in order to turn the UK Government's vision of a 'learning society' into a reality. The main objectives of Ufi (now branded *learndirect*) are to stimulate demand for lifelong learning amongst businesses and individuals; and to promote the availability of, and access to, relevant high quality, innovative learning opportunities, in particular through the use of Information and Communications Technology (ICT).

The project brings together a wide public-private partnership of suppliers of education and training to create a network of tutor-supported learning centres. The setting up of learning centres is key to the project and many of the centres are situated in non-traditional locations, including companies. It is making lifelong learning available through local learning centres that provide learning opportunities tailored to the specific needs of individuals. Access to information, guidance and advice on learning opportunities and providers has been improved by the setting up of a call centre for one stop shop advice, signposting, guidance and registration for courses.

Offering flexible modes of delivery using ICTs and 'bite-sized chunks' of learning or discrete modules has meant that individuals that require learning for a specific purpose rather than a full qualification or employed learners who need to fit learning around their existing family and work commitments have access to learning

Australia

Learning centres

Implemented: 1989, still running

Objective: Encourage local involvement and build local support

The Centre for Research and Learning in Regional Australia (CRLRA) at the University of Tasmania has explored the relationship between the quality of learning in community, social capital in that community, and sustainable economic outcomes, in regional areas of Australia. Australia also has experience of linking communities of practice (groups linked for a common purpose which involves on-going learning and interchange of ideas and experience), for example farm owners or managers. Useful good practice principles for building learning communities can be derived from the Western Australia Universities or the Queensland Open Learning Network (QOLN).

QOLN was established in 1989, as an initiative of the Queensland Government to improve access to learning opportunities for communities where access was restricted through isolation and other factors. QOLN has developed a network of over 40 Open learning Centres which perform a range of roles and functions in their communities.

The centres aim to be a community focal point for learning. Co-ordinators are employed from the local community and are required to encourage local involvement and build local support, so as to broaden the impact of the centre in the community

ANNEX II

The scope for developing indicators and benchmarks on lifelong learning

1. BACKGROUND

Lifelong learning has been an issue in the policy discussion for quite some years now. However it has increasingly become a priority area in policy making in the late 90s when its importance for social and economic development as well as for social cohesion and active citizenship in the knowledge economy has been widely acknowledged. This recent focus combined with the inclusion of education and training among the Community competencies for the first time in the Maastricht and then the Amsterdam Treatyⁱ, has created increasing demand for statistics in the area of lifelong learning.

The process towards European indicators in education and training was begun decades ago and has gained momentum in the 1990's. In February 2000 the European Commission created a Task Force on measuring lifelong learning. The Task Force aims to make recommendations on approaches to be adopted within the European Statistical System (ESSⁱⁱ) taking on board the statistical implications of this Memorandum. Explicit needs for indicators expressed in other official policy documents such as the Lisbon Conclusionsⁱⁱⁱ, the Joint Employment Report^{iv}, the e-Learning initiative^v and the report on the quality of school education^{vi} will also be taken into account in the further development of indicators in the area of LLL.

The task force includes representatives of UNESCO and OECD, to ensure the greatest possible involvement of the international organisations active in the area of education statistics.

The following paragraphs try to provide a short overview of existing statistical information and tools relevant to lifelong learning as it is delimited in the context of the present memorandum as well as some indication for the way forward.

2. CURRENT SITUATION

Existing statistics on education and learning are based on a system approach, since this has dominated policy perspectives to date and, to a lesser extent, on individuals and companies. The focus is on the formal education and training systems (UOE^{vii} and VET^{viii} data collections), on educational attainment within these systems and on the labour market outcomes of education (LFS^{ix}, ECHP^x etc). Data on participation of adults in education and learning (LFS) are also collected though there is a clear focus on formal education and job-related training. Information is also available on work related training offered by enterprises (CVTS^{xi}) as well as on the household expenditure on education (HBS^{xii}), but the typologies used for educational services or products do not allow the useful exploitation of this information. Efforts have also been made for the direct assessment of skills through different international surveys like IALS^{xiii} on the literacy and numeracy of adult education, TIMSS^{xiv} which is curriculum and school based and, recently, PISA^{xv} which is school based but not curriculum based.

The present change of perspective, where lifelong learning is given more weight not only in the area of education but also in the areas of employment, economic growth, social exclusion etc is expected to change the perspective of analysis of most of the above mentioned sources unveiling hidden information that has not been exploited until now since there was no policy

need clearly expressed. Additionally these sources may be modified in this new perspective to provide improved coverage of different aspect of LLL.

3. EMERGING NEEDS

Today more information is needed on **the way individual citizens learn** in formal and non-formal settings but also through informal activities like self-learning. Skills can be acquired in several ways and it is essential to monitor skill acquisition – as well as erosion. We need to be able to assess the **societal outcomes of learning** (eg citizenship related outcomes, environment, consumer protection) as well as the employment-related and personal outcomes in a wider sense (e.g. basic skills, economic well-being, physical and mental health and well-being, satisfaction).

Notions like motivation, expectations and satisfaction are essential for lifelong learning, while personal investment in time and money is a major issue in the debate. The role and involvement of the different actors of the learning market (commercial enterprises, NGOs, professional bodies, local authorities, state and of course individuals) also needs to be clarified.

Finally, as a market for education and training is taking shape, there is a need to collect information on the providers and the economics of providing teaching/training, the cost and availability of supply. Learning systems have remained substantially stable for several decades and are recently undergoing radical changes. Effective policy-making requires monitoring and even anticipating these changes.

The area of education and learning statistics seems to be overlapping in its non-formal and informal areas with time use statistics, cultural statistics (where DG EAC and Eurostat in cooperation with UNESCO have progressed recently), tourism statistics and statistics on audiovisuals, Information Society and intangible investment in structural business statistics. These represent opportunities to supplement the direct sources in LLL and call for harmonised and ad-hoc approaches to make best use of them.

Concretely on the main themes of the Memorandum on lifelong learning the following comments may be made:

3.1. New skills for all

Education and training systems are to provide people with the basic skills which are necessary for the knowledge economy. The skills must be continuously updated and many people will need to access them outside the education system. Then every effort should be made to assess them in an acceptable and comparable way, building on the experience of existing direct assessment methods. Information on basic skill levels (e.g. foreign languages and ICT) could be collected through household surveys, where appropriate.

The effectiveness of the formal education system at providing universal access for the acquisition of the basic skills threshold and the development of a learning culture should be further explored in relation to LLL. The assumption that the regular (traditional) system context, which is teachers working for instructional institutions teaching students enrolled on specific programmes, leading to qualifications/diplomas, which they complete within a given time period should be adapted to accommodate modular programmes, non-sequential study and qualification trajectories, open and distance education and self-directed learning programmes. Early childhood education should be distinguished from childcare and its extent

and contents should be specifically examined. Contextual information on structures and organisational and curricular arrangements is paramount for putting in context any statistical information on the formal system, thus making it policy relevant.

Information on non-formal education is already collected by existing sources, from individuals and companies organising training for their employees. Nevertheless specific classifications of non-formal and informal learning activities should be developed or improved, where they exist, for use in household sample surveys, time use surveys etc.

Information on individual motivation and attitudes may also be collected through household surveys while the involvement and attitudes of other actors like enterprises, NGOs etc should be assessed in specific surveys.

3.2. More investment in human resources

To obtain more information on the investment, in terms of time and money, in lifelong learning the following should also be done:

- harmonised information on time investment by individuals (for example through Time Use Survey); this information needs to be combined with contextual information on working arrangements, childcare facilities etc. with a view to assessing the obstacles to learning in terms of time availability
- harmonised information on household consumption/cost of educational services and products through Household Budget Surveys
- change the treatment of public spending on education in public sector accounts (it should be treated as capital, not current expenditure); development of satellite accounts on education covering more than spending in formal education; inclusion in the analysis of expenditure on "LLL infrastructure" (eg communication networks and learning centres).
- investment by enterprises in training (Structural Business Survey, Labour Cost Survey); investment in human resource development should be considered as intangible investment and be given equal treatment, also in statistics, as capital investment;
- improve the coverage of education as an economic activity in Business and Information Society statistics so as to evaluate the offer of educational services and products and their market value (content development, guidance services, educational material production etc).

3.3. Innovation in teaching and learning

After the appropriate definitions have been agreed, information on the number of people working voluntarily and employed in education and learning (formal, non-formal, informal) may be collected. Contextual information on the required level of qualifications and skills required for educators may be used for analysis targeting always the longer term objective of measuring the level of the necessary skills, once they have been defined.

3.4. Visibility and recognition for learning

The outcomes of European Union initiatives such as the ECTS, the CEDEFOP Forum for the transparency of qualifications or the automated assessment test may contribute in the longer term to the development of a typology of qualifications (formal and non-formal) that may be used to assess the totality of validated knowledge available in the society. More opportunities for data collection may come from initiatives such as Europass, aiming to ensure recognition of training across Member States. Other initiatives, for instance the European Computer Driver's Licence (ECDL), could also be a source of essential information.

3.5. Rethinking guidance and counselling

Contextual information on the arrangements for guidance and counselling at different geographical levels may be complemented with information on whether people know about the possibilities offered and whether they are satisfied with their service. A typology of services of educational guidance and counselling could be developed in the context of the development of a classification of educational and learning services and activities. To be effective, data collections in this area should address individuals as well as guidance centres

3.6. Bringing learning closer to home

Information on education and learning needs to be at a geographical level, as close as possible to the level of intervention which is usually the local level. At present, certain data sources, e.g. LFS and CVTS, yield some data at regional level. The main limitation is the cost of extending samples to ensure representativity. In countries where the regional component is very strong, e.g. Italy, additional statistical efforts are made to meet this kind of demand. Within the foreseeable future, education statistics at regional level will be collected on an ad-hoc basis.

4. THE WAY FORWARD

Systems-based data should be complemented/enriched by learner-centred data that takes formal, non-formal and (intentional) informal learning needs further into account. To cover most of the issues raised in the previous paragraphs for which gaps exist, with the exception of early childhood education and some aspects of investment in education by all actors, the best solution seems to be a dedicated adult learning survey. Such a survey would include information on :

participation (incidence), **time** spent in education and training (volume), **nature** of education and training (by purpose/aim), the **source of financial support** (public, employer, self) , perceived **benefits** (job-related, societal, personal), perceived **demand** (needs and interests), perceived **motives** (job-related, societal, personal), perceived **obstacles** to participation, transparency of learning offer (**information and advice**), self reported **digital literacy**, self-reported **foreign language skills**

Background variables would include: Individuals: age, sex, educational attainment, field of education and training, labour market/employment status, current/last job, nationality/citizenship/main residence, income as well as NACE sector, size for those who are employed.

In order to implement this approach some methodological tools need to be developed: a specific classification of learning activities (which should take into account inter alia the

existing classifications of fields of education and training^{xvi}, the classifications of economic activities revised to cover educational goods and services^{xvii} the education classifications for use in Time Use Surveys as well as the Classification of training provision developed under a Leonardo I project^{xviii}); a typology of obstacles to learning and a typology of expected outcomes (job-related, societal and personal)

An ideal design of such a survey, though very complex in its implementation, would be to conceive it as a chain of interrelated modules which can be developed gradually as ad hoc or standard modules locked into suitable existing surveys. The LFS 2003 ad-hoc module on LLL, which will be the first link in the chain, will provide the opportunity to develop the necessary methods and nomenclatures and test some of the notions. The inclusion of cultural statistics modules should also be considered (currently under development by Eurostat with DG EAC, UNESCO and MSs) – educational audiovisuals, leisure/tourism, etc. The Eurobarometer could also be a useful and appropriate source, in particular on perceived effectiveness of education and training.

This approach should allow for the study of different population groups (educationally and socially disadvantaged persons, young people etc) but in case more information is needed on specific categories or cases, the methodology developed in the general context of LLL could possibly be used as a basis for broader comparisons.

Additionally, the administrative structures that are to be put in place for implementing the European Union strategy on lifelong learning should already have an in-built statistical structure in their conception, that would make possible the collection of information at source.

5. CONCLUSIONS

Although some statistical information exists already on LLL, there are still important gaps which are highlighted by every step made towards the development of a concrete policy. The notion of lifelong learning is vast and to study it requires a clear identification of the themes that need to be explored as a priority. We should also recognise that certain of its aspects are not measurable. Statistical information must be complemented by contextual information so as to give depth to our understanding and relating information on the process of learning and its outcomes to the best policies . It is important to reach agreement on the priorities for lifelong learning and discuss their operationalisation in terms of statistical needs. The Task Force on measuring lifelong learning plays an important role in this exercise. Once this process is under way, benchmarks can be set to evaluate progress towards clearly set targets.

The aim should be to combine the interests and needs of the different stakeholders involved in implementing LLL in a way that would allow an appropriate portrayal and monitoring of what is undeniably a complex reality.

ⁱ ref. to article

ⁱⁱ The ESS is a network made up of all the government bodies which, at the various levels - regional, national and Community - are responsible for drawing up, processing and disseminating the statistical information needed for the economic and social life of the Community. The education section of the ESS includes not only the fifteen Member States of the EU but also the remaining EFTA countries, the pre-accession countries of Central and Eastern Europe as well as South-East European countries. The Community focal point for the European Statistical System is Eurostat, the Statistical Office of the European Communities.

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- ⁱⁱⁱ The Conclusions of the special European Council meeting on 23-24 March 2000 in Lisbon call (para 36) for structural indicators to be provided in annual Synthesis Reports.
- ^{iv} Every year the Commission drafts a report on the progress on employment guidelines on the basis of national reports. The JER 2000 and Guidelines for 2001 make explicit reference to the need to develop indicators, in particular in lifelong learning.
- ^v COM (2000) 318 final « eLearning : Designing tomorrow's education »
- ^{vi} The new 'European Report on Quality Indicators in Education', requested by Ministers of 26 European countries in Prague in 1998, presents sixteen indicators relating to the quality of educational systems from 26 European countries. The report is intended to act as a starting point for discussions for assisting national evaluation of school standards across Europe. It can be found at:
<http://europa.eu.int/comm/education/indic/rapinen.pdf>
- ^{vii} Annual joint UNESCO-OECD-Eurostat data collection of statistics on students, teachers, graduates, expenditure; main focus is the regular education system
- ^{viii} Annual Eurostat data collection of statistical and contextual information on initial vocational education and training; includes information on apprenticeship training, financial arrangements and work-based programmes
- ^{ix} The Community Labour Force Survey is a quarterly harmonised sample survey on the situation of the labour force in Europe; it is one of the main instruments for measuring participation in education and training and educational attainment of the adult population (15-year-olds and above). The questions on participation in education have recently been updated.
- ^x The European Community Household Panel is an annual survey that collects data from the same group of people (that is the panel) allowing for a longitudinal analysis of their characteristics; the main problem is that the sample is very small so a lot of the information on education, attitudes and social situation cannot be combined to a great level of detail.
- ^{xi} Continuing Vocational Training Survey is an ad-hoc Eurostat Survey held twice (in 1994 and 2000); it collects information from enterprises on the training they provide to their employees
- ^{xii} Household Budget Survey is an annual Eurostat survey; the level of detail of educational expenditure does not permit detailed analysis of results
- ^{xiii} The International Adult Literacy Survey has been held between 1994 and 1998 at least once in a number of countries. Data have been published by Statistics Canada and OECD.
- ^{xiv} The Third International Mathematics and Science Survey was a school based survey of the International Association for Educational Assessment (IEA- to check) in (to be completed). A TIMSS repeat is under preparation.
- ^{xv} The Programme for International Student Assessment is held for the first time in 2000; it is an OECD-led school based survey that will be repeated in 2003 and 2006; all EU Member States participate in PISA in 2000..
- ^{xvi} Classification based on ISCED97 and developed jointly by Eurostat, OECD and UNESCO.
- ^{xvii} NACE/CPA
- ^{xviii} Classification of Training Provisions was completed in 1999 under the Leonardo da Vinci programme. It can be found at <http://europa.eu.int/comm/education/leonardo/leonardold/stat/trainingstatis/areas/area6.html>.