

Live and Learn

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New EU Commissioner:

**What is good for us
is good for
our neighbours**



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WHAT IS GOOD FOR US IS GOOD FOR OUR NEIGHBOURS

Ján Figel', the new EU Commissioner for Education and Training

“If we want to live in a good neighbourhood, we must help to develop it, and money spent on education and training is an investment on a par with other economic investments”, EU Commissioner Ján Figel' states in this interview.

Far reaching changes to support the development and reform of education and training systems are scheduled to be implemented during the time that the new EU Commissioner for Education, Training, Culture and Multilingualism, Ján Figel', will be in office. In this interview he foresees that many of these changes will also impact the future work of the European Training Foundation.

“As you will be aware, the Commission has proposed that more than one hundred instruments – including Tempus – that govern EU activity in external relations should be replaced by six broader ones after 2006. Tempus itself is expected to expand to cover school and vocational education and training as well as higher education – although details of the actual form the programme will take have yet to be finalised. It is clear, however, that three of these six broad instruments will concern the future of Tempus. These are: the new *European Neighbourhood and Partnership* instrument, the new *Pre-accession* instrument, and the new *Development and Economic Cooperation* instrument,” Ján Figel' states.

We met the new Commissioner on home ground in his native Slovakia on the occasion of the TransFair Leonardo conference in Bratislava, and in our interview Ján Figel' offered a glance at

future developments that will impact the work of the ETF in the years to come.

“The new proposals all contain articles which would expressly include assistance in education and training as an objective. They are designed to allow the adoption of thematic programmes within them, and the new Tempus programme is intended to be one of these. We expect the European Training Foundation to play a key role in assisting the Commission in its

actions in all of these areas, and we expect they will do so by providing the relevant Commission services with information and expertise to support policy development, implementation and evaluation.

Although this is essentially the direction the European Training Foundation has taken in recent years, due to a clearer definition of strategies that impact on the work of the Agency, the organisation will change,” Ján Figel' says.



New EU Commissioner for Education, Training, Culture and Multilingualism, Ján Figel', foresees many changes in the field of vocational education and training.

Photo: Brigitte Diewald, Vogus

Enterprises are only as good as their human resources

Earlier this autumn, incoming European Commission President Mr José Manuel Barroso named his new team of commissioners which included Mr Figel', who, as Slovakia's Deputy Minister of Foreign Affairs, led the country's membership negotiations in the run up to accession. In the preparatory shadow cabinet, which hosted the nominees from the new Member States this spring and summer, he worked side by side on enterprise policy and the information society with former commissioner Erkki Liikanen.

Although he would be the first to admit that education is

relatively untrodden territory for him, Mr Figel's nomination is likely to be good news for vocational education and training in the European Union and beyond. His experience with enterprise development warrants a thorough appreciation of the importance of human resources development: "Enterprises are only as good as their human resources," Mr Figel' believes. His background in foreign affairs will help him appreciate the role of education in the wider political perspective. As a citizen of a former candidate country he has firsthand experience with the needs of countries in transition. Last but not least, Ján Figel' is a very sympathetic man who is clearly at ease among people and is unlikely to go into hiding in the Commission's refurbished Berlaymont headquarters.

insufficient exploitation of the potential of ICT and e-learning. Finally, more needs to be done to address the needs of people at risk – people whose position in the labour market, or even social status, is under threat."

"Much of this requires action from the individual Member States; the Commission can do little more than keep the momentum, except in one very notable area: there is still a lack of adequate data on input and outcomes of VET. This is a severe problem because it effectively makes reliable comparisons between countries impossible. This deficit has to be addressed urgently and must be added to action at the European level. All these issues will be discussed at the Conference of Ministers in Maastricht in December this year."

Photo: Getty Images



Commissioner Ján Figel' believes the agendas set in Lisbon and Copenhagen mark the way forward in European vocational education and training.

Copenhagen

Mr Figel' believes the agendas set in Lisbon, and more specifically Copenhagen, unambiguously mark the way forward in European vocational education and training. They should be pursued. "The Copenhagen agenda is very clear in its priorities for VET: strengthening the European dimension; improving transparency, information and guidance; recognition of competences and qualifications; and promoting quality assurance," he says. However, he stresses that the Copenhagen Declaration shouldn't become a religiously followed dogma: if flexibility is required of vocational education and training, politics must also set an example by demonstrating flexibility.

"We have commissioned a study, *Achieving the Lisbon goal: the role of VET*, which has identified gaps in the Copenhagen priorities that must be addressed by boosting efforts. Among them are low participation rates in continuing VET – which doesn't match with the desire to promote lifelong learning, insufficient levels of funding, insufficient attention on self-organised learning, and

Neighbourhood

Mr Figel's roots and his experience with foreign policy will be an asset to the work of the European Training Foundation: he has firsthand experience of the benefits of multilateral support to reform in a country on the border of the European Union.

"Well, yes, the advantage is obvious, but let me first point out that in May this year my expertise in foreign relations was suddenly converted into expertise in European affairs. For me this is a very important detail. We must learn not to see European affairs as international affairs. Viewing things from this angle also helps explain the distinction between our support to potential future candidate countries and current and future neighbours."

"Otherwise, I hardly need to stress how important I think the aims of the current neighbourhood policy are. It's all quite simple. We say we would like to live in a good neighbourhood. If we want to live in a good neighbourhood, we must help develop it. We have devised a policy to help us do this."

"We know quite well what is good for us. One of these things is good education. Awareness of

Photo: Getty Images

the benefits of education and support to education development is now quite a bit higher than it was just five years ago. Money spent on education is, quite rightly, increasingly seen as an investment on a par with other economic investments. Surely, what we think is good for us must be good for our neighbours too?"

"So yes, education and training clearly have a role to play in developing our neighbourhood. Good education and training that respond to the needs of society and the economy contribute to employment, economic prosperity and social and political stability. Closer economic integration – one of the main aims of the neighbourhood policy – has strong implications for human resources development. We will ensure that support to the reform and development of education and training systems, and support to human resources development in general, play a correspondingly important role in the European neighbourhood policy."

Thaw

The heritage of Ján Figel's tutelage shows in the potential he sees for education as an ice-breaker in political dialogue – a potential the Tempus programme so adeptly exploited.

"I was in Caserta in Italy this year when, for the first time since the launch of the Barcelona process, all ten participating countries agreed on one issue and signed the same charter. The subject was enterprise development, but that is not the point. What mattered was that this small field managed to get their heads together. They may disagree on numerous other issues, but agreement in one field is, psychologically, a major step towards improved cooperation in a much broader context. It nurtures understanding and tolerance. This shows how sometimes long-term political aims can be served tremendously by agreement on more narrow



The EU Commission's new headquarters, the Berlaymont in Brussels, where Commissioner Ján Figel will have his new cabinet.

areas such as enterprise, in this case, or education. In education the agreement underway with Russia may well show a similar yield. In education we cooperate well with our eastern neighbours. This opens the road to further dialogue – on issues we perhaps still disagree on today. I see an important role for education here too."

Paternity

For someone so recently thrown into the EU arena, Mr Figel displays a profound understanding of the issues that really matter in education. He is, for example, acutely aware of the classic problem that, in a political world governed by regular elections, the incubation time of education reform results often works to its detriment. While it is precisely long-term planning and vision that are so desperately needed in education.

"I grew up in the country; my father was a farmer. Under communism he didn't have the kind of money that could buy him

any luxury, but one thing always stood clear for him: he wanted his five kids to be properly educated. Politicians are not always good at this kind of long-term planning. They have limited terms; they like to be re-elected. That can be problematic in education which is typically a long-term investment field. We need more of this fatherly attitude to support long-term education planning and development. Learning to approach education in this way would bring us a very large step closer towards fulfilling our European ideals."

Ard Jongsma
International Correspondents
in Education

Find out more:

Ján Figel' - Member of the European Commission -
http://europa.eu.int/comm/commissioners/figel/index_en.htm
EU Tempus Programme -
<http://www.etf.eu.int/tempus.nsf>
TransFair -
http://www.saaic.sk/transfair/contact_public.htm

Good education and training that respond to the needs of society and the economy contribute to employment, economic prosperity and social and political stability



It is important to take account of the application of technology to education and training.

The e-learning methodology has a high potential

Technology-enhanced learning, often in the form of e-learning, has made persistent headway in European education. This surge has been propelled by the increasing demands of a learning adult population. Continuous development throughout working life will be required from most European adults if the ambitious aims of the European strategy in education, training and employment (known as the Lisbon strategy) are to be met. This has implications for the development of technology-enhanced learning in the current and possible future candidate countries, such as Bulgaria, Romania, Croatia and Turkey. ETF staff are currently researching the results of a survey of advances in e-learning in the countries of south-eastern Europe.

One of the current medium-term objectives of the ETF is to help candidate and potential candidate countries to prepare for their integration into the EU. As such, the ETF helps them prepare to contribute fully to the success of the Lisbon strategy. In south-eastern Europe specifically the ETF supports the development of education and training policies that promote economic development and social cohesion, which are considered necessary preconditions for the integration of these countries into the political and economic mainstream of Europe.

TECHNOLOGY-ENHANCED LEARNING

The ETF would not be doing its job thoroughly if, in all of this work, it did not take account of the application of technology to education and training. Indeed, since its launch in 1995 the ETF has undertaken a number of activities in the field of distance learning and e-learning on behalf of the European Commission.

The very first was the Phare Multi-Country Programme in Distance Education, which contributed to the establishment of centres of expertise and know-how in 11 countries. The programme, which ran from 1995 to 2001, included components for the training of specialists in the design, implementation and delivery of distance learning courses. During the programme's years of operation over 200 courses were developed for a total of more than 1,000 participants. The closure of the programme was followed in 2001 and 2002 by an evaluative survey. This survey showed that most of the centres remained active; that staff trained during the programme remained committed; and that equipment installed under the project's auspices was still in use. Many of the courses developed during the programme were still being delivered, some with adaptations.

In 2002 an e-learning course on project evaluation for project managers in Russia, Serbia and Albania was piloted by the ETF. The results of the pilot were so promising that their scope was extended soon afterwards. Results of the projects have been disseminated with a view to raising awareness in our partner countries of the potential of e-learning methodology.

A study on e-learning in Israel carried out in 2003/04 was aimed at stirring up the debate

on technology-enhanced learning in the country. It encouraged the exchange of positive experiences to identify convergent strategies between the EU Member States and Israel. In this particular study the focus was on how e-learning could be applied to the pre-service and in-service training of teachers' and trainers'.

The above projects, coupled with the lessons learned from our management of numerous e-learning initiatives within the Tempus programme, give staff at ETF an insight into the practical issues which surround the use of technology in VET reform. This insight and the whole span of our expertise have been used in our latest venture in this field: a survey collecting information on the current position of technology-enhanced learning in south-eastern Europe.

The scale of this survey is unprecedented: the countries covered include Albania, Bosnia





Photo: ITCL/O.F. Decorato

The ETF is currently preparing a new survey on e-learning in South-Eastern Europe to be published in December.

and Herzegovina, Bulgaria, Croatia, Kosovo, FYR-Macedonia, Romania, Serbia and Montenegro, and Turkey.

The prime aim of the survey is, of course, to chart current activities in e-learning in the region. Its results can subsequently be used to boost the reform processes in these countries, identifying weaknesses and hopefully referring to good practice elsewhere in the region.

Work on the survey started in July 2004 and focused on the use of ICT in education and training. The survey mapped such issues as ICT penetration in schools, the use of ICT in the classroom, and potential and addressed target audiences. Methodology, assessment and accreditation are covered in the survey. Legislation supporting and promoting the use of ICT in the classroom, and e-learning in general, is being also taken into account. The survey is carried out through a combination of questionnaires and field visits designed to collect information on infrastructure, methodology and the policy framework.

The results of the survey and an analysis of its findings will be presented at Online Educa Berlin, the 10th International Conference on Technology Supported Learning & Training, to be held in December 2004. They will be published on the ETF Website shortly afterwards.

*Muriel Dunbar
Director of the European
Training Foundation*

Find out more:

E-learning in Israel -
[http://www.ETF.eu.int/website.nsf/
Publications?ReadForm&LAN=
EN&Key=Mediterranean+Region
~Israel](http://www.ETF.eu.int/website.nsf/Publications?ReadForm&LAN=EN&Key=Mediterranean+Region+Israel)

Online Educa Berlin -
<http://www.online-educa.com/en/>



Photo: ETEFF, Decorato



EUROPASS

TAKING SKILLS AND COMPETENCES A STEP FURTHER

Photo: Getty Images



Europass opens for greater mobility in Europe.

Europass will make it a lot easier to directly communicate learning achievements across different European countries

Early next year closer integration of European education and training will receive a formidable boost with the launch of Europass, the new European education and training passport. The implications of Europass for the open EU labour market and, ultimately, as a milestone on the road towards the Lisbon aims are quite obvious: Europass will make it a lot easier to directly communicate learning achievements across different European countries. But the launch of the initiative has both implications and potential positive spin-off effects for many countries beyond the boundaries of the current European Union. The European Training Foundation helps prepare future Member States for the adoption of the set of documents, but also

sees a potential for Europass as a model solution to a regular 'brain twister' in many of its partner countries: national or cross-border transparency in vocational qualifications.

Europass has been on the drawing board for two years and will initially consist of a set of documents, commonly referred to as *the* Europass, that will help people throughout the European Union interpret achievements made in other European countries. It contains a CV in a standardised format, records language skills, competences attained through work experience and formal learning, and so on. Its strength is that it stops short of providing the actual interpretation of the qualifications it describes. The Europass is an accreditation *tool*, not a formal accreditation itself. Accreditation and recognition of training is still a hot potato throughout Europe, and the project would have been doomed if it had dared to tread this area. But its seemingly unassuming nature – 'just' translating national achievements into a common format and international language – is its strength. This also applies when it comes to serving as a model for countries in other parts of the world, because the Europass is unprecedented internationally in both scale and scope.

The Europass' five constituent units (see inset on these pages) have been developed by different communities in separate environments. As an example, one of the papers included in the Europass – the Diploma Certificate – is a direct offshoot of the Bologna Process through which European universities, quite independently from the European Commission, have striven for more integration in European higher education. Other documents have been

developed on the back of Community programmes such as Leonardo, or together with other international organisations, such as UNESCO and Council of Europe, and pioneered by agencies such as Cedefop (the European Centre for the Development of Vocational Education).

From the outset, the European Commission has made it very clear that the Europass is meant to be a framework model. It covers five documents now, but nothing stands in the way of expanding or extending it in the future.

Vaclav Klenha is one of the people at the European Training Foundation who has helped spread the news about the Europass beyond the European Union boundaries. "Our first mandate is to help candidate countries and possible future candidate countries prepare the ground for adoption of the Europass. In Bulgaria, Romania, Croatia and Turkey this is done with the support of colleagues from our National Observatory network," he says.

Seminars throughout the partner countries have had Europass on the programme, and the meeting of National Observatories in Istanbul in October included a session on Europass developments. "We introduce documents and tools, we explain the formats – what can be edited and what cannot," says Vaclav Klenha. "We explain the importance of the initiative, both in terms of providing much needed transparency, but also in terms of achieving the aims of the Copenhagen process in which transparency is a major objective. They need this information quite badly - to be informed and able to respond proactively, but also because a number of them have been assigned the task of translating the documents into their languages, none of which are

current EU Member State languages.”

Another role of the observatories is to disseminate the information on Europass further into their relevant country. “The observatories are the ETF’s entry point. They have their own networks and have in the past proven effective at further disseminating the information to ministries, local and regional authorities, social partners and all who need it.”

Once Europass is operational, national Europass centres will start functioning in each country. In the candidate countries, the establishment of such centres is in progress. The national authorities decide who will host the centres but the ETF could play an important role in preparing staff at the projected centres. “We help them to get informed and up to running speed. We even finance some of the preparatory activities. And we help introduce correspondents into existing European networks,” says Vaclav Klenha.

The ETF not only disseminates information. It also monitors how widespread is the current use of some of the Europass documents outside the European Union. This may seem paradoxical, but aspects of the Europass can fill a void in transition countries. This is perhaps best illustrated with the developments that followed the introduction of the European Credit Transfer System (ECTS). ECTS was initially far more readily adopted among universities in a number of candidate countries, some of whom developed national credit systems built on the model of ECTS. The definition of VET qualification and certification standards is at an advanced stage in most EU Member States and it is not always easy to get them to adopt new formats. But some of the ETF’s partner countries are still struggling to find a way of harmonising qualifications even within their own borders. For them, as was the case with ECTS, a well-designed model that has the added benefit of being internationally intelligible can be



Europass is internationally in both scale and scope and has a potential as a model solution to a regular “brain twister” in many EU partner countries.

The original Europass-Training and how it came to be

Europass-Training is a standardised method of recording the training undertaken and the skills acquired through work by people across the European Union.

Through an agreement with the rather unappealing title ‘Decision on the Promotion of European Pathways in Work-linked Training, Including Apprenticeship’ (1999/51/EC), in December 1998 the European Council of Ministers agreed on the design of a document that was given ‘Europass Training’ as its working title. Over the years this single document evolved into the set of papers that we now, somewhat confusingly, refer to as ‘Europass’. In fact, *the Europass is indeed meant to become a physical set of documents.*

The Europass does not itself provide a formal accreditation of the experience gained. It is aimed at improving transparency, helping employers and employees understand the implications of experience gained both at home and abroad. The standard format of the document is intended to ensure a consistent framework for the recognition of skills by training providers and employers throughout Europe. The Europass will initially comprise five instruments, detailed in ‘The Europass Framework’ below.

The use of the Europass extends beyond training that takes place in the context of Community programmes and initiatives. Thus, it can cover placements organised independently by private partnerships or through bilateral initiatives.

a welcome alternative to expensive and time-consuming development work.

The same applies to some extent for international transparency in the regions the ETF works with. Some of these – most notably the southern and

eastern Mediterranean regions – have a history of far more intensive labour mobility than the European Union, but very little of this is reflected in the way each of them individually organises its training or describes its vocational qualifications.

Europass may well hold a tremendous potential because it is such a universal tool



"Europass has a great potential in partner countries," says ETF programme manager Vaclav Klenha.

Yet, at ETF conferences and workshops in the region a recurring topic is the desire to improve the international

transparency of national qualifications.

"In such situations and perhaps even beyond, Europass may well hold a tremendous potential because it is such a universal tool," says Vaclav Klenha. "The need to make qualifications more transparent is present everywhere and only increasingly so in our internationally-oriented economies. Especially for countries in transition, the introduction of the Europass will be worth following closely."

The political launch of Europass will take place on 15 December 2004 during the Conference of Education Ministers in Maastricht. An official launching event to be held at the initiative of the rotating EU presidency by Luxembourg at the end of January 2005 should gather up to 350 participants from across

Member States, EFTA and candidate countries. Participants in the Luxembourg conference will include the European Commission, national authorities, social partners, chambers of commerce, NGOs, and others.

Pressure on the European translation services has hamstrung the actual start of activities, but Europass should become fully operational in early spring 2005.

Find out more:

Europass Training - http://europa.eu.int/comm/education/programmes/europass/index_en.html

European Credit Transfer System (ECTS) - http://europa.eu.int/comm/education/programmes/socrates/ects_en.html

The new Europass framework

The Europass should be conceived as a framework whose exact composition can be adjusted over time. Initially, the Europass will embrace five documents:

The European CV: the backbone of the portfolio

The European CV is a slightly improved version of the common European CV format established through a Commission Recommendation in March 2002. Improvements only concern the terminology; all other features remain unchanged. Like all CVs, this is a personal document completed by the person concerned.

The European Language Portfolio: recording language skills

The European Language Portfolio adapts a model previously agreed within the Council of Europe and based on the Common Framework for Languages. It is a document where citizens can record the linguistic and cultural skills they have acquired. It contains in particular a Language Passport, where holders can give details on their proficiency in languages. Countries can adapt the common model, for instance to better gear it to the needs of specific target groups.

The Diploma Supplement: transparency in higher education

The diploma supplement concerns higher education: it is the document jointly developed with the Council of Europe and UNESCO, to make higher education degrees more transparent.

The Certificate Supplement: transparency in vocational education and training

The certificate supplement concerns vocational education and training. This proposal does not make any change to the common format agreed informally by the Member States and used by national authorities to prepare the actual supplements for each certificate. This document has a different nature from the others, as it does not refer to its specific holder: a certificate supplement clarifies the vocational qualification to which it refers, and is the same for all those who hold that qualification.

The Europass Mobility: making mobility visible

The current Europass-Training document will be replaced by the MobiliPass. The MobiliPass is meant to record European learning pathways – periods of learning in another country that satisfy certain quality criteria. Importantly, this learning needs to be linked neither to work nor to Community programmes.

Access to all information related to Europass will become available through a Europass portal, accessible in 25 European languages. The portal will become operational in 2005. The websites set up by National Europass Centres will provide additional vocational guidance and support to those seeking employment in another European country.

(Edited from the December 2003 Commission Memorandum on Europass.)

FINANCING HUMAN CAPITAL

THE CONTRIBUTION OF THE EUROPEAN INVESTMENT BANK



The European Investment Bank (EIB) is an international financial institution, and in terms of criteria such as lending volume, it is the largest in the world. Such institutions have significance *macro-economically*, in terms of the magnitude of the capital flows they mediate, and *micro-economically*, because of the sectors and projects they opt to support.

Supporting education and training

The Bank has been active in the education sector since 1981. At first this was on a minor scale limited to vocational training. It only expanded to general education after the Amsterdam council in 1997. The experience indicates that, despite the high social and economic returns from education, there are still major shortfalls in the way human capital investment is financed across the Union. At the outset, the education investment initiative was expected to be small scale, for a temporary period, restricted in geographic scope and reach, and centred around the consideration of direct effects on employment.

Following the outcome of the European Council of Lisbon the EIB fostered its activities in the two sectors. Since 2000 human capital lending has become a permanent feature of the bank's portfolio, largely unrestricted geographically and treated as a top priority. This is especially in relation to, on the one hand, the connections between the development of human and social capital, and on the other, desirable outcomes pursued as part of the Lisbon strategy, such as employment, cohesion and economic growth.

Indeed, investments in research and development (R&D), education and downstream innovation projects are crucial to the bank's contribution to the Lisbon strategy.

They support the social cohesion activities, feed into the bank's financing of innovation, and in general are pursued because of their anticipated effects on employability, rather

than employment as such. In 2003, loan approvals for human capital projects accounted for about 15% of the bank's turnover, the bulk of which was for school and university infrastructure, vocational training centres, and healthcare facilities and equipment. Many EIB loans benefit from very long maturities (up to 30 years), with appropriate grace periods, and with an emphasis on projects located in assisted areas.

As a result of the Council of Thessaloniki in December 2002, in the perspective of a progressively enlarged European integration, the bank's orientation has been broadened to also include investments in the Western Balkan countries.

The EIB at a Glance

As the EU's policy-driven bank, the EIB was established in 1958 under the Treaty of Rome at the same time as the other institutions in what was then known as the European Economic Community (EEC). The EIB was set up to provide loans, financing itself by borrowing on capital markets rather than drawing on the budgetary resources of Member States. The European Commission manages the EU's grant funds – in particular the Structural Funds. The EIB often co-finances projects with the Commission. The new European Constitution confirms the EIB as an autonomous body of the Union directly owned by the Member States. The bank reports to its Board of Governors, which is made up of a government minister from each Member State, usually the Minister of Finance.



The headquarters of the European Investment Bank (EIB) in Luxembourg.

Photo: EIB



Photo: ILO/J. Maillard

The EIB has in the last five years invested 186 billion Euro, particularly in poorer regions and in the new EU Member States.

The building of a strong human capital base is considered a key aspect of the creation of a more integrated European Union where sustainable economic development goes hand-in-hand with the creation of an enlarged and integrated area of convergent economies

The main target remained the fostering of the level of educational attainment and the development of human capital. However, this objective included an area not yet inside the European Union, although geographically positioned between several Member countries.

The EIB has already made a contribution, albeit a modest one, with respect to the financing of youth and education policies in the Western Balkans. It is clear, though, that the bank has much more important challenges still to meet in the coming years to help all the countries of the region ensure adequate access for all children, youth and adults to high quality education and training programmes.

The benefits of investments in Human Capital

The consensus view defines human capital as the knowledge, skills, competencies and other attributes of individuals that are relevant to productive activity, and to participation in community

based activities that promote social cohesion. Much of the stock of human capital is in practical terms measured in education and health status.

The EIB's focus on investments in youth and education policy is justified because of the expected favourable impacts of skill formation and employability on productivity, innovation, and social cohesion. Moreover, the building of a strong human capital base is considered a key aspect of the creation of a more integrated European Union where sustainable economic development goes hand-in-hand with the creation of an enlarged and integrated area of convergent economies.

The economic evidence strongly suggests two important stylised facts. The first is that the bulk of society's capital stock is not inanimate but human. Estimates vary, but it is likely that more than half of society's capital¹ – valued at replacement cost – is human capital rather than physical infrastructure. This is the reason why societies can often recover from war rapidly even if there is severe damage to the physical fabric. But they

will not do so if their people are uneducated or sick. The second fact is that increasing people's levels of human capital yields a high return relative to competing investments. Accumulated research evidence has shown conclusively that there is a significant link, for both individuals and societies, to investment in an additional year of schooling, and that this return in most circumstances exceeds that of alternative investments in other sectors.

Traditionally, the EIB has mostly supported human capital formation *indirectly*, by co-financing large-scale projects in sectors such as transportation, energy, water, industry, and urban renewal. It was thought that the economic benefits would translate to better living conditions and, more gradually, create room for increased expenditure on 'social' infrastructure, including schools, vocational training centres, and public hospitals. History shows that this is what has happened in many cases.

In the early years since 1997, the bank's preferred approach was to invest directly in the infrastructure that supports the development of human capital – school buildings, training centres, multimedia laboratories, university libraries, and even student hostels. This is a supply-side response, improving the facilities in which one expects individuals to accumulate their own productive knowledge and skills. There was – and today still is – a large need for capital-intensive investment in neglected school infrastructures in all European countries.

Experience has shown that whilst investments in the physical infrastructure of schools and training centres have a key role to play, it is also important to integrate these investments with complementary strategies such as teacher training, SME support and service management. For this reason, not all of the EIB's human capital interventions have been in supply-side measures, and not all have involved 'bricks and mortar'.

¹ 54% HC, 7% physical assets, 38% financial assets. Estimates by MIUR (Italian Ministry of Education, University and Research).

To give some examples, the EIB has co-financed elements of *e-Learning* in schools, universities, and research centres. Other options we have successfully used are global loans and venture capital via the EIF (a member of the EIB Group) for employment creation and active labour market training. Another demand-side option that has been considered, for instance, are student loan schemes, which directly finance individuals during their accumulation of human capital.

As part of its contribution to the Lisbon strategy, the EIB has also become increasingly involved in the co-financing of research, development and innovation projects conducted within both corporate and academic settings. Therefore, in relative terms, one can say that the bank has reduced its financing of 'conventional' industrial plants in favour of funding education and health infrastructure and research programmes of innovative industrial enterprises and public sector institutions.

Priorities for investments in the nations of the Western Balkans

In the late 1990s and early 2000s, EIB interventions in the countries of the Western Balkans focused essentially on high priority needs related to the restoration of basic infrastructures that had suffered from war damages. In particular, several EIB operations in those years contributed to the financing

behind the rehabilitation of transport connections and electricity networks.

After the first phase of post-war reconstruction programmes, the investment in human capital in the countries of the Western Balkans is now both important and timely, and is something that still needs to be continued in subsequent phases. More recently, with the gradual economic development of the region, EIB loans were earmarked for the modernisation and upgrading of infrastructure facilities with a view to raising the quality standards of national systems to a more homogeneous level, and thereby fostering the integration of the Western Balkan countries into a wider market.

There are, indeed, few matters more critical to public policy in the nations of the Western Balkans today than employment, growth and social cohesion. In the EIB it is considered that one of the key levers to attaining these desirable policy goals is through the fostering of human capital, defined as the sum of each population's stock of education, and vocational and professional skills, as well as health status.

The Western Balkan countries' transition towards European integration and economic liberalisation is occurring alongside the effort to restore peace and social stability in the region. However, the success in these areas largely depends on the speed at which the recovery phase is implemented so as to produce tangible improvements in the quality of life of the population.

As the Western Balkan countries move towards modern knowledge economies, significant investments in the area of health and education are urgently required. Deficiencies in the schooling infrastructure, lack of adequate training programmes for teachers and managers, and insufficient use of information and communication technologies (ICT), are common features of the Western Balkan countries.

Poor school facilities and weaknesses in the education system are reflected in a high level of illiteracy and unemployment throughout the Region. In Serbia for instance, it is estimated that nearly 60% of the population is at the minimum level of educational attainment or below. Use of ICT in the schools is quite insufficient: in Serbia the ratio of pupils to computers is 1:230 in primary schools and 1:64 in secondary schools.

Therefore, the challenges that lie ahead are considerable and can only be met through effective cooperation between the donor community and the governments and the authorities concerned.

Against this background, and in keeping with the recommendations of the European Union summit in Thessaloniki, in the Western Balkans the EIB has pursued an active dialogue with governments, the European Commission, the European Agency for Reconstruction (EAR) and the other international financial institutions active in the area, with the aim of identifying and preparing operations targeted to the enhancement of the health infrastructure and human capital resources.

This activity of the EIB is now bearing fruit. In October 2003 the bank signed a finance contract with Serbia and Montenegro to contribute to the funding of an investment programme to restore basic services in regional hospitals located throughout the country and to modernise a research centre specialised in producing anti-polio vaccines. This operation, prepared and co-financed with the EAR, the European Commission and the World Bank, is now under implementation.

The challenges that lie ahead are considerable and can only be met through effective cooperation between the donor community and the governments and the authorities concerned

The Bank's Lending Portfolio

In the last five years (1999 to 2003), € 186 billion has been provided by the EIB for investment, particularly in poorer regions and in the new European Union Member states. This finance has supported projects ranging from research, development and innovation, to roads, bridges, urban light railways, large- and small-scale industries and businesses, waste treatment, water supply, renewable energy schemes, hospitals, and education and training investments.

How does EIB invest in human capital?

The EIB Group can provide both traditional medium- and long-term financing and equity funding. Loans, in a number of currencies, can be made on a fixed, variable or revisable basis. Depending on the client's needs and the project size, the EIB can advance individual loans for investment costing more than € 25 million, normally for up to half the fixed investment cost of the projects. The EIB generally prefers to advance individual loans of no less than € 12.5 million. Smaller loans are available through global loans via partner banks. Global loans are temporary credit lines opened with banks or other financial institutions operating on a European, national or regional level. These intermediaries draw on the global loan proceeds to finance, in accordance with EIB criteria, projects undertaken by small- and medium-sized enterprises, and infrastructure schemes usually promoted by local institutions. In principle, the EIB can lend to any creditworthy borrower in the public, private or not-for-profit sectors. In the human capital sector, typical borrowers include universities, hospitals, regional or municipal authorities, central governments, research bodies and private companies.

Other operations aimed at reinforcing healthcare services and infrastructure have been identified and are under consideration in certain countries of the region, including Serbia and Montenegro, Bosnia Herzegovina and Albania.

In Serbia, within the context of a government plan for systemic educational reform focused on decentralisation, and the improvement of education standards and reinforced training for teachers, the EIB, together with the EAR and the World Bank, is considering the financing of an investment programme comprising the modernisation of primary and secondary schools, and refurbishment of special needs schools.

Such projects will provide better infrastructure and equipment, including ICT tools, preparation and set up. Special efforts will be devoted to health

vocational schools which have a wider effect on welfare improvement for the communities concerned and the region as a whole. In particular, ethnic minority groups will be targeted by the EIB's projects. These are seen as pilot operations that may be followed by subsequent investment schemes in the coming years in the framework of government initiated investment programmes.

Similar interventions in favour of the upgrading of schools have been identified in Albania where a project is now under preparation in cooperation with the Council of Europe Development Bank and the Municipality of Tirana.

Some concluding observations

The EIB stands ready to scale up its commitment and support to the governments of the Western Balkans, in cooperation with the Commission, the European Agency for Reconstruction, and other concerned International Financial Institutions.

The effort to reform and modernise the education and training systems of the countries in the region to increase access, improve quality and relevance, and optimise efficiency, should be treated as a top priority for bank lending, since successful European integration depends on the sustained development of the human capital stock of all associated countries.

A good example of the EIB's 'intangible' contribution to the production of relevant sector knowledge was the conference on "VET Reforms in the Western Balkans: How to Finance and Implement?", which was held in Thessaloniki, Greece in March of this year.

This conference, which the bank's services co-sponsored with the European Training Foundation and Cedefop, provided a welcome opportunity to exchange views with officials from all the countries and learn about their priorities for reform and the associated requirements



Albert Tuijnman, Human Capital Division, EIB.

in terms of finance, management and implementation capacity.

This certainly helped to refocus on the human capital needs of the Western Balkans, and as a consequence several new investment projects are now being discussed. We look forward to deepening this cooperation with the Commission, the ETF and other specialised agencies over the coming years.

In conclusion, over the next few years, the European Investment Bank can be expected to become an even more important partner for the countries of the Western Balkans in their quest to reform and modernise their education systems, and to invest adequately and wisely in the young population and its valuable stock of human capital.

Albert Tuijnman
Human Capital Division
European Investment Bank

Find out more:

European Investment Bank - <http://www.eib.org>
European Agency for Reconstruction - <http://www.ear.eu.int>
Council of Europe Development Bank - <http://www.coebank.org/homeen.htm>

MAINSTREAMING HEALTH AND SAFETY INTO EDUCATION



Integrating occupational safety and health into school and university education is the key to reducing work-related accidents and illnesses, claims a new report published by the European Agency for Safety and Health at Work.

To integrate or 'mainstream' occupational safety and health into education means to integrate one policy area (occupational safety and health) into another (education). Different systems with different institutions and different cultures have to communicate with each other and take joint action. The EU strategy on health and safety has identified education and training as key factors to strengthen the prevention culture. Education about health and safety should not start with entry into the world of work; it should be part and parcel of the school curriculum or a vocational subject in its own right.

The European Agency for Safety and Health at Work started its project 'Mainstreaming occupational safety and health into education' in 2002 with the slogan 'Start young, stay safe'. The project is driven by the idea that the sooner children and young people get acquainted with the concept of safety and health, the sooner can they

develop risk awareness and shape their own safety and health environment in their future working and private lives.

The latest report, *Mainstreaming Occupational Safety and Health into Education*, is one of the youngest of the project's offspring. It reviews examples of how groundbreaking initiatives in different EU countries have managed to provide a safer working life for thousands, and outlines how their achievements can be translated into a systematic strategy for integrating occupational safety and health into education and training.

The 152-page document is aimed at both policymakers and practitioners within the educational system. It consists of three main parts: a description of good practice; an analysis of the key elements of a successful mainstreaming process illustrated within a model; and a 'road map' for the future development of a coherent strategy to mainstream occupational safety and health into education at European level.

According to the report, young employees under age 25 in industrialised countries are 50% more likely to have a work-related accident than the



The European Agency for Safety and Health at Work suggests that education about health and safety should be part of the school curriculum.

average staff member. The authors argue that one of the main reasons for this is that most adolescents enter the labour market with only little knowledge of the risks. This is mainly due to a lack of education in preventive measures.

To help policymakers and practitioners work towards resolving this, the report describes and analyzes 36 examples of how different EU countries have successfully integrated occupational safety and health into different levels of the education system. Of these, 14 are presented as full case studies.

Examples of good practice covered in the study include a UK initiative to educate children about the dangers of building sites; a methodology to help teachers in Italy introduce occupational safety and health into the school syllabus; and a scheme in France where pupils on work placement are invited to find ways to improve their host companies' health and safety environment.

The examples are divided into three different groups: those with a holistic approach, those with a curriculum approach, and those with a workplace approach.

Education about health and safety should be part and parcel of the school curriculum or a vocational subject in its own right



Many schools in the EU already educate children about dangers and teachers help to strengthen the prevention culture.

Photo: OSHA

Photo: OSHA



Photo: OSHA

The European Agency for Safety and Health at Work is located in Bilbao, Spain.

‘Start early to stay safe’

Case studies based on the holistic approach have a more comprehensive understanding of safety and health, including physical, mental and social wellbeing. Furthermore, they focus on the whole school system and address the ‘school culture’, the learning environment of pupils/students and the working environment of teachers.

The case studies that stress the integration of safety and health into the curricula do not limit safety and health to one specific subject. They advocate the integration of safety and health as a ‘transversal’ topic into the curricula, in other words through all levels of education and in different subjects, for example in languages and literature.

The ‘workplace approach’ case studies focus on the transition from school to working life, for example making students responsible for real safety and health matters in an enterprise, or raising awareness for future risks that will have to be dealt with at a general or sector level.

The report presents a draft model illustrating how occupational safety and health can most effectively be merged into all levels of education. The model was developed not only

on the basis of the case studies, but also on the results of a 2002 seminar on the topic in Bilbao, as well as the draft of an internal report, and the results of the first meetings of the Agency’s occupational safety and health contact group meeting in 2003.

Although the writers of the report argue that health and safety need to be integrated in curricula during all stages of education, they also confirm that courses alone are not enough. “One of the lessons of the study is that health and safety education has to be a lifelong process, from pre-school onwards, to succeed,” says

Hans-Horst Konkolewsky, Director of the European Agency for Safety and Health at Work. “It is about developing a prevention culture, and an integral part of this is ensuring that young people are qualified in the core principles of risk awareness and prevention before they enter the world of work – they have to ‘start early to stay safe’.”

A first step to implement the model into European OSH and education policy was undertaken during a seminar on the topic in October 2003 in Rome. Participants there agreed on the need for a European strategy to mainstream occupational safety and health into education and training. They issued a declaration which became known as the ‘Rome Declaration’. The full text of this declaration is available at: http://europe.osha.eu.int/good_practice/sector/osheducation/rome.stm

The Agency’s website has a section devoted to providing further information related to OSH and education at: <http://europe.osha.eu.int>

The full title of the report is *Mainstreaming occupational safety and health into education. Good practice in school and vocational education*. It is available in PDF format from the agency’s website at: <http://agency.osha.eu.int/publications/reports>

OSHA in collaboration with International Correspondents in Education



CAREER GUIDANCE POLICIES IN ACCEDING AND CANDIDATE COUNTRIES

Career information, guidance and counselling are moving up the policy agenda at national and international levels, and 'lifelong guidance' has become a key phrase in expert forums in the field. This development has been stimulated by the discussions on the emerging knowledge economy and the resultant lifelong learning perspective to education and training, as well as by a number of policy initiatives at European level.

International context

The European Commission has developed a number of policy documents in recent years that reflect the different aspects of current policy thinking in career guidance. The earliest of these, the *Memorandum on Lifelong Learning* (2000) and the related *Communication* (2001), already confirmed recognition of the importance of information, guidance and counselling as building blocks in the development of a culture of lifelong learning, and as priority areas for further action. The European Social Partners, on their part, have identified information and guidance as one of four key goals in the implementation of the *Framework of Actions for the Lifelong Development of Competencies and Qualifications* (2002) – asserting the principle of the shared responsibilities of players. The Copenhagen Declaration (2002) – reconfirmed and updated by the forthcoming Maastricht Communiqué on enhanced European cooperation in VET also specifies as one of

its aims the strengthening of the policies, systems and practices that support information, guidance and counselling in the Member States at all levels of education, training and employment, in order to facilitate the occupational and geographical mobility of citizens in Europe. The European Commission has initiated an Expert Group on Lifelong Guidance that has operated since December 2002. One of its outputs will be a *Career Guidance Handbook for Policymakers*, jointly published by the OECD and the Commission by the end of 2004. In May 2004, the EU Council adopted its first *Resolution on Strengthening Policies, Systems and Practices* in the field of Guidance throughout life.

UNESCO recently published the results of a project on the new role of career guidance in relation to technical and vocational education and training. This report, by Bryan Hiebert and William Borgen, is called *Technical and Vocational Education and Training in the 21st Century: New Roles and Challenges for Guidance and Counselling*.

Career guidance is also becoming a more important theme on the policy agenda of the World Bank. It has already financed the development of related policies and services in a number of developing and transition economies, among them Poland and Romania, and is planning to do so in Turkey. The World Bank also recognises the importance of career guidance in its publication *Lifelong Learning in the Global Knowledge Economy* –

Photo: Getty Images



Career guidance is becoming a more important theme on the policy agenda.

Challenges for Developing Countries (2003).

The OECD review of career guidance policies in 14 OECD countries (2001/2002) was the first international comparative study on the topic. It was also the first time the OECD looked at career guidance from a lifelong learning perspective. The study became a very important stimulus for increased international cooperation in the field. It also sparked the launch of similar reviews by the European Commission (through the ETF and Cedefop), and the World Bank.

The OECD questionnaire, which was also used in later reviews by other organisations, looked at key issues such as policy goals and instruments, delivery settings and methods, roles of stakeholders, targeting of and access to guidance, staffing, quality assurance, financing and the evidence base. It formed the basis of the most extensive harmonised international database ever developed on guidance policy and practice.

Career information, guidance and counselling are moving up the policy agenda at national and international levels



Photo: ILO/J. Maillard

CAREER GUIDANCE POLICIES IN ACCEDING AND CANDIDATE COUNTRIES

through a consultation process which involved the education and labour ministries of all countries involved. The synthesis report was published in October 2003 and is available on the ETF website.

'Policy borrowing'

Overall, the countries involved have demonstrated a high level of commitment to learning from EU policies, good practice and standards. Several countries reported that policies, strategies, tools, resources and training in delivering guidance services had in part been adopted from other countries. The Czech Republic 'borrowed' from Austria and, to a lesser extent, from France. Poland, Romania and Bulgaria found most of their inspiration in Germany. Malta, Slovakia and Slovenia looked at the UK. Finally, Lithuania adopted a system based on that of Denmark.

Awareness

There are substantial geopolitical, economic and cultural differences among the countries. At the same time, all face a broad set of similar challenges for education, labour market and social policies. The country reports indicate an increasing awareness among governments of the value of career guidance as a tool for achieving key education, labour market and social objectives.

Initiatives developed in the field of guidance include:

- the development of legal instruments promoting career guidance, stipulating it as a right of citizens (in Estonia, Latvia, Lithuania, Poland, Hungary and Slovakia);
- the planning and implementation of reforms in guidance (in most ACCs);
- the enhancement of access to services through ICT and internet provision (in practically all ACCs – through regional provision in Poland and Estonia);
- the extension of guidance-related services in the education sector (for example, increasing service

provision in Poland, and introducing school-to-work issues across the curriculum in the Czech Republic and Slovenia);

- the extension of career guidance services to new client groups such as higher education students (Romania, Lithuania, Poland), students or registered unemployed with disabilities (Bulgaria, Lithuania and Slovakia), those already in employment (Latvia), and parents (Cyprus);
- the commissioning of research and reports investigating different aspects of guidance services with a view to their improvement (Bulgaria);
- the articulation of professional qualification and service standards for career counsellors (Malta, Estonia, Poland, Slovakia);
- the establishment (or revitalisation) of career guidance associations (Estonia, Latvia, Poland, Romania);
- attempts to enhance cross-sector collaboration in order to provide a more effective service and to make the best use of resources (Hungary, Bulgaria, Poland – the latter even developed strategies to build up an integrated career guidance system through the establishment of national guidance forums or agencies).

Effectiveness

In most of the countries that were reviewed career guidance takes place within the context of secondary and higher education. Except for Hungary, Slovenia and Slovakia, little guidance is provided at primary school level. A number of countries report that career education, information and guidance are also offered through the curriculum (Romania, Cyprus), or across the curriculum (Latvia, Malta and Poland). However, in most cases guidance staff are still merely expected to help young people to make immediate choices in relation to further study, training

Countries involved in career guidance have demonstrated high level of learning from EU policies, good practice and standards.

Career guidance does not yet seem to be considered a part of the overall organisation of the educational institution

The ETF reviews

In mid 2002, at the request of the European Commission (DG EAC), the ETF started collecting information on guidance and counselling policies in 11 acceding and candidate countries (ACCs). The research was based on the abovementioned OECD questionnaire.

The ETF commissioned independent national experts in all countries, and country reports were prepared with the support of National Observatories. During the research stage the ETF organised an experts' meeting in Turin in September 2002, to which representatives of the OECD, European Commission and the World Bank were also invited. An international expert prepared a synthesis report for the ETF and national experts added country annexes.

Before publication, both the country reports and the synthesis report were validated

and work, rather than promoting the skills and attitudes that are required for continued learning later in life. Career guidance does not yet seem to be considered a part of the overall organisation of the educational institution.

Some countries provide so-called 'work shadowing' and work experience opportunities for secondary level students. There is some evidence that these kinds of activities are on the increase.

In Hungary and Latvia class teachers are key players in the provision of services, although they may not necessarily be trained in school-to-work transition matters. Many of the country reports note that schools are generally failing to satisfy the student demand for guidance. This is in part due to the low number of guidance staff available to pupils. In Cyprus and Romania the ratio is 1:800, while in Turkey it is 1:900. In several countries this is true also for public employment services. In Polish local public employment services, for example, there is only one employment counsellor for every 1,700 unemployed.

Services for adults

Career guidance services for adults, mainly provided within public employment services, tend to be remedial in nature and narrowly targeted to the unemployed with the immediate goal of finding them employment. Within current policy contexts the aim must be a proactive approach, addressing a much wider group and utilising the whole range of guidance functions to help all adults sustain employability and respond flexibly to change.

Public employment services staff are typically overburdened with multiple roles, and only some of these offer further services that are more directly connected to career guidance. While most countries produce their own career information, some others buy, translate and adapt software or even print-based material. Slovakia and Slovenia, for example, use an adapted UK programme.

Little is known about the extent to which clients access career information, understand it, and connect it to their own frames of reference.

Staffing career guidance

The level and nature of qualifications and training required from those who provide career guidance varies widely within and throughout the countries involved. It ranges from hardly anything to the stipulation of high levels of training. Many countries require career guidance staff to have a first degree, often in psychology, pedagogy, sociology or social work. However, specific university level degrees or diplomas in career guidance are rarely offered. At best, as in Latvia, those with a psychology degree may have followed a module on the psychological bases of guidance. On a side note, in most countries the profession is dominated by women. In Poland, for example, around 90% of career guidance counsellors are female.

Partnership

The role of social partners in regulating or funding information, guidance and counselling services tends to be limited and ad-hoc even in the best cases. A major weakness in the area of career guidance is the lack of cross-sector collaboration, with the education and labour market services often working in parallel rather than in convergent and mutually beneficial ways. However, there is a general

trend towards more cooperation in a few countries, such as Poland and Estonia.

Funding

In most countries, career guidance is almost entirely funded by the state, with services being provided free of charge. Only rarely are (minimal) charges made to clients for certain types of guidance. In some cases service delivery is subcontracted to community organisations, private companies or, as is the case in Estonia, to non-profit organisations.

Data

It is almost impossible to get an overview of national expenditure on career guidance in the countries concerned. This is due to a variety of reasons and is a commonly encountered problem even within the EU. Government budgets rarely provide this kind of information. It is often not recorded separately; career guidance is only one of a whole range of activities that the relevant staff provide.

Even harder to gather is evidence and data on the outcomes and impact of career guidance. Guidance is not an insular activity and there are so many variables that have an impact on career decision-making that causality is difficult to establish, especially when issues of effectiveness are being considered. There are no specialised institutions or centres in the reviewed countries which carry out systematic research in this area.

A major weakness in the area of career guidance is the lack of cross-sector collaboration, with the education and labour market services often working in parallel rather than in convergent and mutually beneficial ways

Photo: ILO/J. Maillard



More effort must be made to provide guidance staff with pre-service specialised training

Conclusions

The reports identified a number of key challenges that lie ahead in the area of career guidance.

Leadership

Career guidance still tends to be seen by governments as a marginal activity. As a result, it is rare to find determined leadership with provision sustained by a clearly articulated national policy framework that is both dynamic and adequately resourced.

Legislation

Most country reports note that while legal provisions have been made to widen access to guidance services, often these have not yet been implemented.

Cross-sector collaboration

There is a clear need to enhance cross-sector collaboration. The relevant ministries need to be brought closer together. Professional bodies and stakeholders need to be involved, allowing local, regional and national levels to interact for the benefit of the clients.

Stakeholder involvement

Involvement of employers, trade unions, students, parents and consumer organisations needs to be strengthened in many countries – partly because the public is not fully aware of the benefits of a well-functioning career guidance service, and partly because some policymakers have not yet embraced the styles of leadership that involve social partnership.

Guidance delivery

The mode of guidance delivery in education needs to move from its focus on key decision-making points towards a stronger integration into the general curriculum through different subject areas. There is also plenty of scope for the further development of links between the world of education

and the world of work. There is a tendency to emphasise the provision of information rather than guidance. There are significant gaps in guidance provision for adults and the particular needs of specific groups – the disabled, migrants, and refugees, for example. The latter will have to be addressed more effectively.

Staffing

More effort must be made to provide guidance staff with pre-service specialised training, possibly in the form of certificate or diploma level courses following on from a first degree in fields such as psychology, economics or the humanities. In both the education and labour market sectors guidance staff often suffer from a task overload that severely limits their effectiveness. Despite inadequate staff-to-client ratios, much of the guidance activities are still aimed at the individual, when group approaches would ensure greater access to the services.

Research

There is a need for more research – in particular on the impact, benefits and effectiveness of guidance.

The work continues

As a follow-up to the career guidance reviews, the ETF organised a career guidance conference in Bratislava in December 2002, at which 13 acceding and candidate

countries (10 of them now EU member states) developed action plans for further development of their guidance systems. With ESF support, these action plans are now being implemented in a number of countries (Poland, Slovenia, Lithuania and others). Most activities are heading towards improved cross-sectoral cooperation (the establishment of working groups, National Guidance Fora), National Strategy development, improved career education in schools and enhanced training for guidance practitioners.

The ETF is now carrying out a similar career guidance review in the Western Balkans.

*Helmut Zelloth,
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ETF and Ronald Sultana,
University of Malta*

Find out more:

Memorandum of Lifelong Learning -

<http://www.bologna-berlin2003.de/pdf/MemorandumEng.pdf>

Technical and vocational education and training in the 21st century: New roles and challenges for guidance and counselling -

http://portal.unesco.org/education/en/ev.php-URL_ID=35522&URL_DO=DO_TOPIC&URL_SECTION=201.html

Lifelong learning in the global knowledge economy - Challenges for developing Countries -

http://www-wds.worldbank.org/servlet/WDS_IBank_Servlet?pcont=details&eid=000094946_03062104054940



Photo: ITCL/O.G. Brandi



Photo: University of Brighton

FOOTBALL FOR PEACE

TEACHING AND PLAYING SPORT FOR CONFLICT RESOLUTION IN THE MIDDLE EAST

The only thing necessary for the triumph of evil is for good men to do nothing
(18th century political philosopher, Edmund Burke)

The conflict between the Palestinians and the Israelis is age old, having many causes and multiple expressions. It is a serious local problem with massive global impact. It exists on such a scale that despite a plethora of treaties, political pacts, peace accords and road maps, the challenge of achieving a mutually acceptable political and military solution has hitherto proven to be overwhelming and impossible to achieve. In the resulting hiatus, chaos and carnage have prevailed in the Holy Land, fuelling and sanctifying bloodshed beyond the borders of Israel and Palestine.

Football for Peace (F4P), a sport-based co-existence project for Jewish and Arab children that has been running in towns and villages of the Galilee region of

Northern Israel since 2001, represents a modest attempt to make a difference. Outside of the Middle East, good examples of how sport can contribute to peace processes can be found in South Africa and Northern Ireland. In the former case, sport was one of the most important fronts in the struggle against apartheid. In the post-apartheid era, sport has a new role as a medium through which the diverse and formerly antagonistic elements of the 'rainbow nation' are reconciled and harmonised. In Northern Ireland, where sport was once a theatre for the expression of cross-community animosity, sport is now formally recognised as a key element in the peace process.

The work of F4P builds upon the experiences of South Africa and Northern Ireland in that it seeks to make grass-roots interventions into the sport culture of Israel and Palestine while at the same time making a contribution to political debates

and policy development around sport in the region. Its aims are fourfold:

1. Provide opportunities for social contact across community boundaries;
2. Promote mutual understanding;
3. Engender in participants a desire for and commitment to peaceful coexistence;
4. Enhance soccer skills and technical knowledge.

F4P is not a new programme. It was the brainchild of Geoffrey Whitefield (MBE), a retired Baptist minister with extensive experience of working in the Middle East, and David Bedford, former 10,000 metres world record holder and currently Race Director of the London Marathon. They had the vision and the drive but lacked access to the technical expertise required for the successful execution of sport-based community relations programmes.

Sport was one of the most important fronts in the struggle against apartheid

We set out to design a soccer coaching manual that would provide opportunities for social contact across community boundaries

The University of Brighton, with its large sports department (Chelsea School), track record in the education and training of sports teachers, coaches and leaders, and a global reputation in researching sport and society, was brought onboard as a partner in 2000.

Upon this foundation the first formal phase of the project took place in 2001 when, operating under the label of WSP (World Sport Peace project), six volunteer coaches from the University of Brighton and one staff leader conducted a week-long coaching camp in the Arab town of Ibillin for approximately 100 Muslim Arab and Christian Arab children (between 10 and 14 years old). The original plan had been to partner Ibillin with a nearby Jewish community, but in the wake of a bus bombing in the neighbourhood the ensuing security situation caused the Jewish community to withdraw their children from the project at the eleventh hour.

The 2001 project went ahead nonetheless, helping coaches and leaders understand that community divisions in the region were not confined to Arabs and Jews. It also demonstrated from a logistical point of view (fund raising, planning, travel, provision of equipment, and program execution) that a project such as this could be carried out successfully.

The following year a second project took place involving a slightly expanded team of eight coaches and two staff leaders.



Photo: University of Brighton

The sport provides opportunities for social contact across community boundaries.

This time, in addition to Ibillin, the cooperation of the Jewish communities of Misgav and Tivon was secured allowing 150 Arab and Jewish children, including 20 girls, to share the coaching and playing experience. Local volunteer coaches and community sport leaders were involved in the planning of the 2002 event and participated fully in the coaching project.

It was also at this point that the British Council began to take an interest in the project. Working closely with key figures from local partner towns and villages, the British Council were able to provide vital on-the-ground support for the planning and development of the 2003 programme, which was on an even larger scale than anything we had tried before.

It involved twelve UK coaches and three leaders running three simultaneous projects, working with 300 children and 30 volunteer coaches from six communities spread throughout Galilee. It also involved a pre-project training day during which the UK volunteers worked alongside their Arab and Jewish colleagues in preparation for the coming week's programme.

While the 2003 project was a great success, during the post-project evaluations and in anticipation of a further project in 2004, two significant factors emerged. Firstly, it was determined that, even though the football coaching had been much appreciated by the children, we had to ensure that what we were achieving was more than simply improving football skills. The team felt that they needed to do

more to ensure that the content of the football programme was clearly underpinned by values and principles that fed a broader community relations agenda, and that those values and principles were appreciated by the local coaches and experienced by the children in practice.

With this in mind we set out to design a soccer coaching manual that would provide opportunities for social contact across community boundaries; would promote mutual understanding; and engender in participants – children and coaches alike – a desire for and commitment to peaceful coexistence. In addition, of course, we aimed to enhance soccer skills and technical knowledge, but this was very much secondary to the broader community relations aims. The manual emphasises the following principles and contains a series of practices and exercises through which children's learning and understanding of these principles can be made manifest:

1. Neutrality
2. Equity and Inclusion
3. Respect
4. Trust
5. Responsibility

A pilot version of the F4P Coaching Manual was produced in March 2004 and was used in the next phase of the project in Israel in July later that year. While this manual has been designed within the context of the contours of division in Israeli society, it is envisaged that it may be adapted and used for similar purposes in other troubled and deeply divided societies elsewhere in the world.



One of the F4P projects involved besides coaches and leaders 300 children from six communities.

Photo: University of Brighton

The second theme to emerge from the evaluation of the 2003 project was a perceived need to do more work year-round with adult volunteer coaches and community sports leaders from the participating towns and villages. While not insignificant, the impact that a week-long coaching project can have on longer term cross community relations is necessarily limited. The one-day training event in 2003 had been extremely useful, and we were concerned to keep developing links and networks among those people who were not only key in terms of planning for the 2004 event but were also significant in the development of community sport policies in the region.

To further this aim, in March 2004 we organised a week-long training event in the UK at the University of Brighton attended by 30 invited Jewish and Arab community leaders. In addition, from the UK we invited the 28 student volunteer coaches and seven leaders facilitating the 2004 project. After an introductory day of trust games and adventure activities, the remainder of the week was dedicated to working through the draft F4P Coaching Manual, and culminated in an escorted visit to Arsenal football club. Evaluations indicated that this training event was an unqualified success, and our Israeli guests left with a strengthened commitment to the values and principles that drive the F4P intervention. This training initiative enhanced the delivery of the project itself in July 2004 and is a dimension that we plan to build into any future projects.

The 2004 main event was more than twice the size of anything that had been done previously. It involved 700 children from 16 communities widespread throughout Northern Israel. In its execution, a team of 28 student-volunteer coaches and seven leaders from the UK worked alongside 60 local Jewish and Arab-Israeli volunteers at seven different project sites, including a girls-only project in Tiberias on the banks of the Sea of Galilee. The project began with a further

training day for all of the local and UK coaches held at the Israeli national sports university, the Wingate Institute. Then, after four days of coaching at the separate sites, all 700 children were brought together in mixed teams to enjoy a grand finals day at the stadium of Nazareth FC. After the awards ceremony, when the winning teams were handed their trophies and every child given a medal, as the anthem-like song 'all together now (in no-mans land)' blasted out from the stadium's loud speaker system, all 700 children, relatives and friends spontaneously flooded onto the pitch to dance and sing in celebration with the coaching teams.

The whole project was subjected to detailed research and evaluation, involving surveys, interviews and more in-depth, ethnographic studies. Preliminary findings suggest that, at least in the short to medium term, participation in the project can have a positive impact on children's and coaches perceptions of 'the other' community. Moreover, this research indicates that F4P is not only a valuable vehicle through which children can begin to think about co-existence and mutual understanding, but it is also an important vehicle for changing the way community leaders and policymakers think about how sport can be utilised as a cross-community resource.

In addition, on-going evaluations confirm that the UK volunteers who participate in F4P experience a horizon expanding adventure that enhances their own personal and social development. On this basis, so long as adequate funding can be secured, F4P is scheduled to be repeated in 2005 following the pattern of the 2004 project, while also expanding into one or more urban environments.

Clearly, the key dimensions of any peace plan have to be political, military and economic. However, if proposals articulating at these levels do not resonate with the feelings and aspirations of the people, if they are not sympathetically received at the level of community, then it is unlikely that such grand schemes can succeed. Therefore, it is important that work taking place at the level of political society is matched and complimented through efforts being made within the multiple spheres of civil society and culture, including sport. F4P is making a small, but nonetheless significant, contribution to this effort.

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under construction) at,
football4peace.co.uk*

It is important that work taking place at the level of political society is matched and complimented through efforts being made within the multiple spheres of civil society and culture, including sport



The manual from the F4P project in the Middle East can be used for similar purposes in other troubled and deeply divided societies elsewhere in the world.

Photo: University of Brighton

INFORMAL LABOUR MARKET ACTIVITY IN PARTNER COUNTRIES

AN UNEXPLORED AREA THAT NEEDS CLOSER ANALYSIS

This article follows on from a more general description of the conceptual framework of the informal sector, published in the first issue of Live & Learn in July 2004. This second exploration of informal labour market activities will deal more specifically with transition societies, with particular emphasis on the CIS zone. As in the first article, it is important to distinguish the informal economy from purely illegal and underground business activities.

There are several ways to examine this growing social phenomenon. One of them is simply to observe, whether you are in your neighbourhood market, in the city park, or travelling through the rural lands of Central Asia or the Caucasus. Real street labour markets for construction services are a daily scene in Tbilisi and Baku, for example.

Another way to find out is by examining studies, reports and statistics. But what if the reliable processed information on informal labour market activities is limited to a few analytical studies, based on the national labour force and household statistics dated 2000 at best?

The increasing importance of informal work and business activity justifies more investigation of this key aspect of many transition labour markets. The informal economy is not confined to a certain social or professional group or to a specific region. Informal income generation has become the recourse and the social safety net for many people in the

majority of ETF partner countries.

In the absence of more specific and up-to-date information on the socio-economic picture behind the informal economy, we must tell the story with the data we have².

The International Labour Office (ILO) has been the main initiator of studies and policy recommendations on the informal sector and the informal economy. It is now more than 30 years since the ILO mounted a series of multi-disciplinary 'employment missions' to various developing countries, the first of which was to Kenya in 1972. This mission recognised that traditional production and service activities had not only not been absorbed by the modern capitalist economy, but also had persisted and become more vigorous through new micro-enterprises. To highlight this fact, the Kenya mission renamed the 'traditional sector' the 'informal sector', using the term coined by Keith Hart in the previous year.

The informal economy attracted renewed attention in the 1990s, when the world witnessed one of the most significant instances of economic and social transformation of a group of countries with high human development profiles, which moved from centrally planned economies to market-based economies (Central and Eastern Europe (CEE) and the Commonwealth of Independent States (CIS)). This growth of the informal economy



The informal sector needs closer analysis.

in countries with high human development profiles attracted the interest of international donors, although studies frequently took a legal approach, focusing on the issue of non-compliance with taxation and regulations.

A new stimulus to further research was provided by the general discussion on the informal economy at the 90th International Labour Conference in June 2002. A limited number of papers analysing the origins of and trends in the informal economy in the CIS zone appeared. These proposed new concepts that were tailored to the social and economic characteristics of the region rather than those of developing countries, where the bulk of previous research on the informal sector had been carried out. Selected references are given in this article.

One of the central features of the transformation to market economies was the rapid and strong contraction of output and the longer than expected recovery in the majority of the countries concerned. The output recession was accompanied by significant resource dislocation, affecting the level and dispersion of income and leading to inequality and poverty.

Informal income generation has become the recourse and the social safety net for many people in the majority of ETF partner countries

² Acknowledgements to my colleague Natalia Popova for this reflection.



Transition was a sudden and significant shock for social, economic and employment structures. It rapidly led to under-funding and lack of performance in the public services and social security systems, and to the informalisation of employment. The latter was linked to falling employment rates and revenues in the severely affected formal economy, although the introduction of new non-standard forms of jobs and production by international firms has since been recognised as another major cause. The effects of transition on the labour market must be seen in relation to the effects of globalisation and labour flexibilisation, complicated by the institutional and regulatory confusion of the transformation process.

The depth and duration of the transformation recession is a result of various factors, particularly the pattern of 'under-reform' in the majority of the CIS. Although privatisation has occurred, it has failed to provide a major stimulus to growth. Governments have announced private sector and Small and Medium size Enterprise (SME) support policies and programmes, and introduced improvements to the regulatory framework for

business. However, the investment and entrepreneurship environment (including legislation and enforcement, taxation and registration, costs of complying with regulations, access to information and access to appropriate financing) remains contradictory, uneven and complicated. The pace of economic restructuring has not been matched by consistent and comprehensive market reforms, and this has resulted in economies with advanced de-industrialisation, but apparently less well-developed entrepreneurial capacity (attitude, culture and skills) than exists in CEE countries, for example. Privatised state enterprises rather than new entrants into the market (new firms) continue to dominate many of the CIS economies. The growth of SMEs, particularly in sectors that rely heavily on added value and expertise, has been hampered by a lack of appropriate financing and by complicated licensing and bureaucracy. Consequently, much of the private sector activity in the CIS is concerned with exploiting either arbitrage opportunities or countries' natural resources. Many SMEs avoid growth and, in the most difficult business environments, even established medium-sized firms limit their promotion campaigns in order to avoid attracting attention (and new controls) from state bodies.

To summarise, uncertain macroeconomic environments with inadequate market structures do not encourage domestic or foreign investment, and adversely affect output and employment growth. Formal enterprises suffer, and as a result, many are tempted to conduct informal business activities alongside their formal activities. The association of a formal registered enterprise with various informal businesses or practices is an increasingly common situation. The formal enterprise is necessary in order to have access to banking services (mainly credit and foreign currency operations) and to maintain an official set of books and tax reporting. The

associated informal businesses are necessary in order to avoid taxation and punitive controls that would reduce the revenue of the business as a whole and damage the profitable sides of the enterprise.

The motives for participation in the informal economy will differ according to the stage of reform that has been reached in a particular country. Analysts suggest that in countries that are at more advanced stages of reform (CEE region), informalisation tends to be driven by market causes (as a way of avoiding taxes and escaping bureaucracy and over-regulation). In contrast, informal activities in the CIS are associated with a lack of opportunity in the formal economy; hence, they represent a coping strategy for survival. The European Bank for Reconstruction and Development (EBRD) Transition Report (2000) supports the view that informality for survival is more common in the CIS than in CEE countries. Both motives may also co-exist.

Why is the growth of informality in labour market activities a matter of policy concern? For societies with high human development profiles only a decade ago, economic development strategies that deliberately rely on or build on the informal sector and informal employment represent a backward step and will guarantee a low level of competitiveness for future generations.

The association of a formal registered enterprise with various informal businesses or practices is an increasingly common situation



The pace of economic restructuring has not been matched by consistent and comprehensive market reforms.



Photo: ILDP, Deloche

Almost 16 million individuals are engaged in informal activity of one kind or another in CIS-7 countries.

The proliferation of the informal sector is a wake up call to governments

Tolerating informal labour market activities as part of a necessary coping strategy, promoting the seeds of an entrepreneurship culture that are inherent to informal business and promoting self-employment as a promising alternative to non-existing wage employment are not the same as promoting the informal sector as a strategic part of social and economic development, or relying on the informal sector to create those jobs that the mainstream economy, atrophied by excessive bureaucracy and rent seeking, cannot create.

The proliferation of the informal sector is a wake up call to governments. Large informal sectors have the potential to distort key economic indicators (GDP, employment and

unemployment rates), and any decisions that are based on them. The informalisation of the labour market may lead to a loss of public revenues that could otherwise contribute to the social sector. However, some analysts argue that in the poorest countries in the CIS the large informal labour market primarily has a subsistence character, and can hardly be seen as a sizeable untapped tax resource. Provision of social security based on income levels becomes more difficult as informal employment spreads and becomes common practice for poor households. But a more serious and longer-term negative effect is the risk of skills erosion and the resulting inability to adapt to technology changes for the large numbers of educated people forced by circumstances into the typically low-skilled activities of the informal sector.

Recent research (Yoon et al., 2003; Barnabè, 2002), based on national labour force and household surveys and using adjusted informal sector definitions, presents the following picture of informal labour market activity in CIS-7 (the poorest seven countries³).

- The level of informal activity is very high, and is composed primarily of 'own-account' workers in small-plot farming, multiple job holding (secondary jobs), unpaid family workers in farms and businesses, self-employed workers in non-agricultural household enterprises and informal employment (which is well represented in formal enterprises and even in state organisations).
- Almost 16 million individuals aged 15 years and older are engaged in informal activity of one kind or another. Formal employment rates are actually higher than the informal rates. Many formal employees have multiple jobs, typically in the informal sector.
- Approximately three quarters of all informal employment is in agriculture.
- Self-employment in 'off farm' business is of less importance than in CEE countries, possibly reflecting less emphasis on entrepreneurial initiative and culture.
- Poverty affects firstly the unemployed and inactive population. However, the study shows that in all the countries concerned, informal employees and farmers are more affected than those in the formal sector. Tajikistan is the exception, since here poverty affects those in formal labour market categories more than those in the informal self-employed sector.
- Extreme poverty appears to be much more common in households that are based on informal activity.

The research concludes that in CIS-7, households are resorting to informal activities in order to 'make ends meet', rather than to exploit wealth-enhancement opportunities.

CIS societies inherited high levels of human capital, assets that are the most valuable and difficult to accumulate. In the context of the very high unemployment rates among young graduates and first-time job seekers in general, informal business appears to be one of the few possible ways to enter active life. But if conditions do not encourage young graduates with, for example, high levels of Information and Communication Technology (ICT) skills and a good business idea, it is clear that new-technology ventures will be quickly forgotten in favour of survival schemes within the typical buy-and-resell business. 'The high level of industrial development, technology, applied research and development capacity, technical skills and market savvy of the population – a societal asset that most developing countries are desperately striving to attain – will be further abandoned since the informal sector actually has little need for such an inheritance.' (Bateman, 2004, p 12).

3 Armenia, Azerbaijan, Georgia, Kyrgyzstan, Moldova, Tajikistan, Uzbekistan

Georgia has one of the highest informal employment rates in the CIS, estimated at 41.5%. Although its population has significant rates of higher and secondary education, the economy is now basically dependent on low-skill sectors, low-productivity self-employment and farming. Agriculture in very small family plots is essentially non-monetary and of low productivity: products are self-consumed and only rarely sold for cash. Poverty in rural areas is therefore less a problem of insufficient food supply than one of a deficit of financial resources and of under-developed infrastructures and social services. In urban areas poverty is a function of unemployment, though recent research has highlighted the serious problem of the 'poor employed'. In the absence of a promising private sector, urban youths opt for longer education paths, and subsequently for external migration.

Demographic trends in Georgia are striking: a) between 1989 and 2002 there was a reduction in the absolute size of the population by more than one million (the 2002 census showed a population of over 4.3 million); and b) the population is ageing significantly, particularly in the over-65 age group, a trend linked partly to external migration. In a climate of failure in governance, which has continued for years, there is a growing perception among the population that good job opportunities have little to do with a good education, since jobs with salaries that really make a difference between poverty and decent living standards are not usually acquired through competition. Education seems to be losing ground as an important variable in determining whether a family stays above the poverty line. This rather negative picture should not be taken to mean that Georgians have abandoned their respect for knowledge and education. However, it does illustrate the reasonable concerns of citizens about the visible damage that weak institutions and unequal opportunities produce.

Tajikistan is a state-dominated and agricultural economy. This is the only CIS-7 country for which there are recent results of a specific survey on informal activities. The survey concluded that the salary from official state employment provides only around a third of the average household income, with the rest coming mainly from informal agricultural activities, migrant remittances and some state benefits. Another striking aspect of the country's economy is the scale of child labour in informal farming. This phenomenon has an impact on human capital formation, since the opportunity costs of participating in education are clearly high in circumstances of household survival. There are also future consequences in terms of skills inequality between certain categories of the population, with resulting discrimination and inability to adapt to labour markets.

The established survival pattern of the majority of informal sector activities in CIS-7 countries suggests that these activities have limited potential to graduate to more formal sectors and thereby become integrated into the mainstream economy. Consequently, they can have little positive influence on the stimulation of economic growth or on enhancing employment opportunities for others.

The ETF has only recently turned its attention to the issue of poverty, the informal economy and the role of skills and training in enabling working people to move out of the informal sectors. Albania was selected for a survey on the informal economy and training. The Enlargement and South Eastern Europe (ESEE) department initiated the study in September 2004 and the project manager is Natalia Popova. The survey results are expected in the second quarter of 2005. Given the importance of the informal sector to most of the poorer CIS countries, surveys that are specifically designed to gather better information on informal and independent economic activity, and that will contribute to a human resources development policy for a future



Recent research shows that extreme poverty appears to be much more common in households that are based on informal activity.

society with a growing economy, can only be a positive step.

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Find out more:
International Labour Office (ILO) - <http://www.ilo.org/>
90th International Labour Conference - <http://www.ilo.org/public/english/standards/relm/ilc/ilc90/index.htm>
EBRD Transition reports - <http://www.ebrd.com/pubs/tr/main.htm>

Education seems to be losing ground as an important variable in determining whether a family stays above the poverty line

NATIONAL QUALIFICATION FRAMEWORKS

A PART OF THE POLICY LANDSCAPE

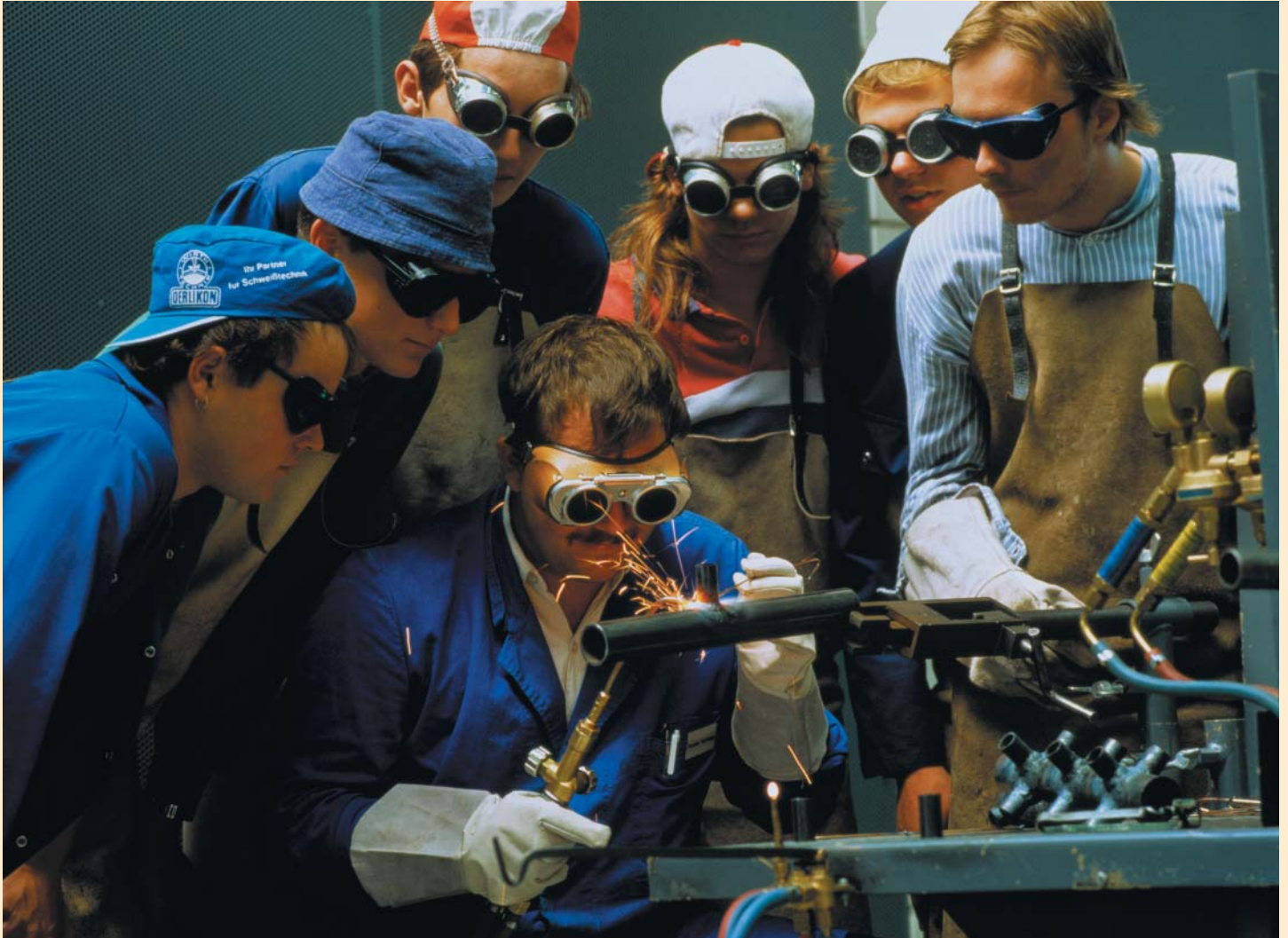


Photo: Getty Images

National Qualification Frameworks provide greater transparency

National Qualification Frameworks have been discussed in different parts of the world for almost twenty years. They are part of the policy landscape in many countries. New Zealand, Estonia, Scotland, the Netherlands, Ireland, Australia, Spain, South Africa, and Romania all have or are developing frameworks for the issuance and management of qualifications. This interest at national level is also reflected in policy work and projects with international organisations – the International Labour Organisation, the European

Union, and the OECD all have programmes underway in the field. The ETF has been operating in this area since 2002, and in 2005 will coordinate projects on National Qualification Frameworks in three of its regions – South Eastern Europe, the Meda region and in Eastern Europe and Central Asia. The interest in National Qualification Frameworks arises from a perception that they provide greater transparency of what qualifications ‘mean’, and that they offer a way of developing learning pathways that people can follow throughout their lifetime.

What are National Qualification Frameworks?

National Qualification Frameworks are so called because they are national in scope, they deal with the issuance and development of qualifications, and they provide for each country a common set of principles and references against which all kinds of qualification can be aligned.

In the main part, National Qualification Frameworks are perceived as a way whereby greater coherence and clarity

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can be brought to the area of qualifications in terms of what qualifications mean with regard to knowledge and learning. Greater clarity about what qualifications mean offers users and developers of qualifications the opportunity to make informed decisions on the relevance and value of qualifications, the relationship between different kinds of qualification (for example, qualifications from higher education, secondary education, and vocational education), and whether or not a qualification opens up opportunities in the labour market or in terms of further learning.

Approaches to achieving this coherence and clarity through National Qualification Frameworks vary from country to country depending on circumstances. In some countries, National Qualification Frameworks are mainly vocational frameworks aimed at facilitating links between the labour market and vocational education, or linking qualifications at initial and advanced vocational levels. In other countries, National Qualification Frameworks are more encompassing and attempt to provide a set of principles that embrace qualifications from all sectors of education – the secondary general and higher educational sectors as well as the vocational sectors.

Despite the differences in focus, there appear to be three main elements that are common to all NQFs. These are:

- A series of reference levels describing types of skill and knowledge contained in various qualifications;
- A set of quality assurance principles to guide implementers and developers of qualifications; and
- Methods for recognising learning gained in different programmes and contexts.

Reference levels

Reference levels provide a set of common benchmarks against which different qualifications can be aligned.

The levels identify the *types* of skill and knowledge found in qualifications. They also describe the *level* of skill and knowledge that the holder of a particular qualification could be expected to have, that is, whether or not the skill and knowledge is at a basic level, an advanced level or whether it is deep or specialised. The purpose of reference levels is mainly to promote clarity and coherence between different kinds of qualification by indicating what they contain.

Different National Qualification Frameworks have different numbers of these reference levels and there is no standard number for a country, for example, the framework in New Zealand has 10 levels, the Scottish Framework - 10 levels, the Spanish Vocational Framework - 5 levels, the Irish Framework - 10 levels, the Australian Framework - 13 Levels, and the framework in the Netherlands - 5 levels. It seems that the number of levels depends on the scope of the framework, in that the more sectors of education covered by the framework, the more reference levels that framework

has. Early discussions on a common European set of reference levels for VET has indicated that 7 or 8 reference levels may apply at the European level.

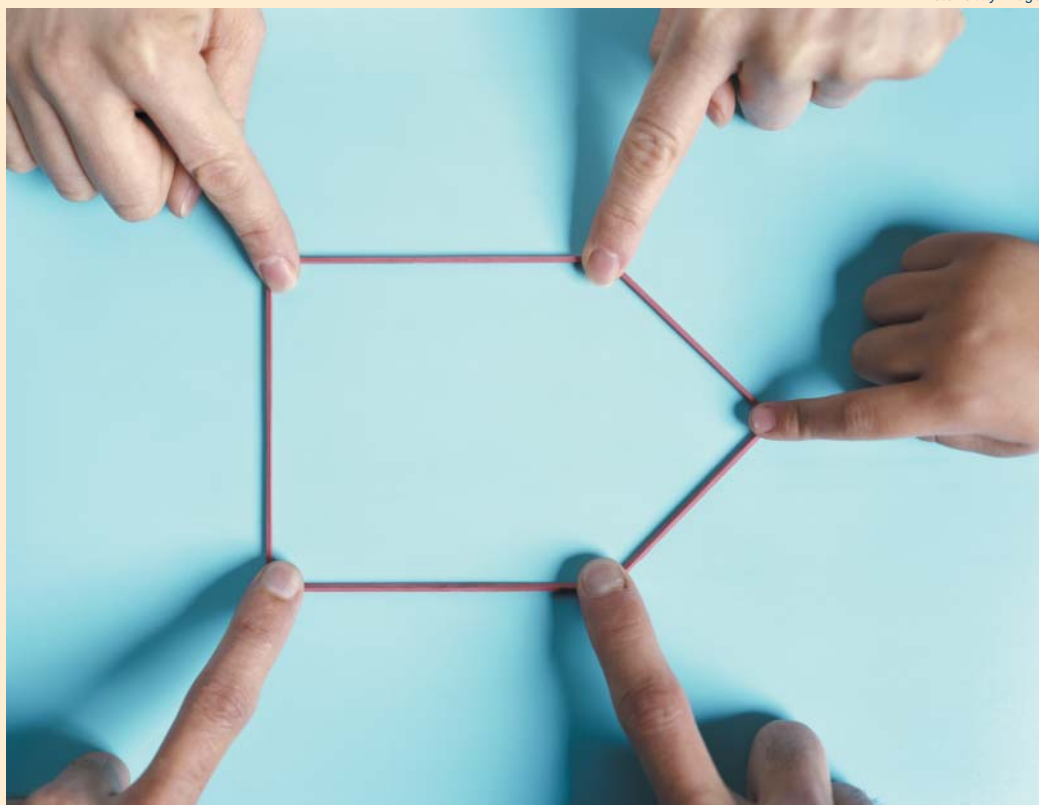
Reference levels generally start with the identification of the skills and knowledge expected to be found in a qualification. This is followed by arranging these skills and knowledge into levels. To see how this works, it is useful to examine a country example.

The Scottish framework is one of a number in which all qualifications – secondary general; initial and continuing vocational education; and higher education – are expected to be included. There are five identified areas that are important to all the qualifications expected to fall within the framework. These are:

- Knowledge and understanding,
- Practice: Applied knowledge and understanding,
- Generic cognitive skills,
- Communication ICT and numeracy skills,
- Autonomy, accountability and working with others.

The purpose of reference levels is mainly to promote clarity and coherence between different kinds of qualification by indicating what they contain

Photo: Getty Images



All qualification frameworks contain guidelines for quality assurance practices

These reflect the type of skill and knowledge contained in qualifications.

In developing the reference levels, each of these is further described in terms of whether the knowledge and skill is expected to be applied in a broad or limited context, is deeply held or is specialised, is exercised in routine or complex environments, involves the use of judgements to evaluate solutions or solve problems, or whether or not a person could be expected to exercise management or supervisory responsibilities. Many dimensions are used to elaborate each of the above items. The resulting elaboration eventually produces a series of levels – each one based on the same group of skills and knowledge, but distinguished according to degree. In Scotland the framework for qualifications has 12 levels, each potentially aligned to a qualification, for example, at level 6 the grouping of knowledge and skill is aligned to vocational qualification and to upper secondary general qualifications, and at level 9 the grouping of skills and knowledge is aligned with first university level degrees and graduate certificates.

Each level has a unique definition. Qualification developers can align their qualifications to the levels. Users of the qualification are then able to see the expected knowledge and skill the qualification

contains, the level it operates at, and also the relationship it might have to other qualifications. This enables users to make informed decisions. Individuals may use the information to make a decision about a qualification to study by identifying if it leads on to another qualification. A training institution may use it to decide what qualification to offer students, and a government may use the information to identify which qualifications to fund, for example, does it want to support qualifications at the upper, middle or lower end of the framework.

In the Scottish example, the definitions used at each level are generic. They are intended to provide a general, shared understanding of each level and to allow broad comparisons to be made between qualifications and learning at different levels. They are not intended to give precise or comprehensive statements, and there is no expectation that every qualification or programme should have all of the characteristics. The New Zealand, Spanish, Irish, Australian, Dutch and South African frameworks all follow similar processes of level definition and alignment.

Programmes seeking to be recognised within a framework of qualifications usually have to identify the learning outcomes they contain. This provides greater transparency in the content of learning and allows users of the programme to evaluate if the qualification's specific content is relevant to their purposes, or how it might link up with other available qualifications.

The use of learning outcomes to describe what a person needs to be able to do at the end of a programme of study introduces the possibility of greater flexibility in how programmes can be used to support qualifications. Learning Programmes can be designed around groups of learning outcomes. The use of learning outcomes in this way offers the opportunity for the development of module-based learning with a choice of entry and exit pathways into a qualification.

All qualification frameworks contain guidelines for quality assurance practices. These support the verification of learning and its delivery in terms of the competence of teaching personnel, the assessment of learning, the materials used to provide the learning, and the learning processes themselves.

Quality Assurance

The second feature that is common to all qualification frameworks is the use of a common set of references for the quality assurance of qualifications. These generally deal with two main issues: the content of qualifications and the awarding of qualifications. In terms of content, quality is increasingly promoted through the specification of qualifications in terms of learning outcomes. Learning outcomes describe what an individual is expected to be able to do and know as a result of the learning that he or she has undertaken in the course of study. The use of learning outcomes is increasingly common in all sectors of education as a means of emphasising the capacity to integrate skills and knowledge in the application of learning.

Methods for recognising learning gained in different programmes and contexts

The final element found in National Qualification frameworks are the methods to recognise learning obtained in different contexts and programmes. This relates to two main themes: the validation of prior experiences and informal learning, and the provision of credit between learning programmes.

The validation of prior learning and experiences means that where possible qualifications are expected to include processes that recognise the experiences and prior learning of individuals as contributing to the achievement of the learning

Photo: ILO/P. Deloche



outcomes in the qualification. As an example, a person who has acquired experience and knowledge of a subject field in the course of his or her working career should have the opportunity to have the experience recognised if they enroll in a learning programme that leads to a qualification. This avoids a situation where a person has to relearn and a trainer/teacher re-teach what the person already knows and is able to do. The use of learning outcomes that clearly specify the knowledge and skills contained in a qualification greatly reduces the possibility of this occurring. The recognition of prior learning is well established in many countries and is seen as potentially a strong contributor to the participation of adults in continuing learning.

A further method of recognising learning that is commonly found in National Qualification Frameworks is the use of credit transfer arrangements that enable people who have undertake one qualification or learning programme to obtain recognition for it in another. This differs from the validation of prior learning and experience in the sense that the focus is more on course participation. The use of credit transfer arrangements enhances the potential portability of learning between institutions and between different sectors of education. In a European context, such processes offer the promise of greater mobility across the EU.

European Developments

Each of the three major elements of National Qualification Frameworks – Reference Levels, Quality Assurance, and Credit Transfer – are currently being elaborated for possible use in a broad European context by the various working groups established under the Lisbon process. Progress to date has been significant, and many of the supporting elements are expected to be in place during 2006. This work at the European level is generating both a great

deal of information about the technical elements of National Qualifications and the issues that can arise during the course of implementation. Many of the developments can be accessed through Cedefop's training village website.

ETF projects

The experience of countries that have developed frameworks for their qualifications indicates that the process does take time but can proceed most adroitly when there is thorough consultation with and participation of the various stakeholders. These stakeholders are critical to the successful implementation of NQF. They include the secondary education community, unions, employers, employer associations, the vocational training community (including private and public training providers), different government ministries (such as the ministries of labour and education), and the university sector.

The ETF will be running three projects on NQF in 2005 in its SEE, MEDA, and EECA regions. These projects will aim not to develop National Qualification Frameworks, but rather to research and facilitate the development of strategies for NQF by countries in the regions. These strategies will focus on the main elements of NQF – reference levels, methods for recognising learning gained in different contexts, and quality assurance processes as well as the consultation process. The focus on NQF in ETF's work arises from the growing momentum behind lifelong learning that is occurring in Member States and partner countries. ETF projects will also assist partner countries in their participation in the Neighbourhood Policy.

Vincent McBride
ETF

Find out more:

EU http://europa.eu.int/comm/education/policies/lll/life/supportlll_en.html#9

Photo: ILO, Maillard



Processes of credit transfer offer the promise of a greater mobility across Europe.

Cedefop

<http://communities.trainingvillage.gr>

ILO

<http://www.ilo.org/public/english/employment/skills/recogn/>

Unesco

<http://www.unesco.org/iau/globalization/qf.html>

Scotland

<http://www.scqf.org.uk>

England

<http://www.qca.org.uk>

Australia

<http://www.aqf.edu.au>

South Africa

<http://www.saqqa.org.za>

New Zealand

<http://www.nzqa.govt.nz>

United States

<http://www.nssb.org>

Malaysia

[http://www.trainingmalaysia.com/mlvk/profile\(english\).shtml](http://www.trainingmalaysia.com/mlvk/profile(english).shtml)

France

<http://www.cncp.gouv.fr>

Estonia

<http://www.kutsekoda.ee/>

The stakeholders are critical to the successful implementation of NQF

A good overview of international practices and issues in the field of NQF is available in *The Journal of Education and Work*, Volume 16, No. 3, September 2003.

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