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**European Union-supported  
educational research  
1995-2003**

*BRIEFING PAPERS FOR POLICY MAKERS*

Report Editor  
Angelos S. Agalianos

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## Foreword

Research in relation to education challenges in Europe is an integral part of the European Union's programme of research in the social sciences and the humanities.

In the Fourth and the Fifth EU Framework Programmes, the Directorate-General for Research (DG-Research) of the European Commission supported a significant number of research projects and thematic networks that address directly issues of education and training. These collaborative endeavours –many of them currently in progress- involve more than 420 research teams across and beyond the EU. They have produced important insights for a range of policies and have laid the foundations for significant research cooperation across Europe in this field.

The projects address a wide range of issues that include: the challenges for future education and training policies in Europe; the dynamics of education and employment; issues of teacher education; issues of higher education; the use of ICTs in learning; issues of education for citizenship; issues of education and social exclusion; lifelong learning strategies; issues of competence development and learning in organisations; innovative pedagogies and school improvement.

The research results demonstrate that in a world of rapid social, political and economic changes, education and training are inextricably linked to concerns that include citizenship and democratic participation, inequalities and social justice, cultural diversity and quality of life. Research shows that questions of education and training should be carefully taken into account in the formation of policies on housing, health, welfare, youth, employment and migration.

**Research on Higher Education** shows that the socio-political demands and expectations with respect to higher education have grown - especially concerning its economic role -whilst at the same time in most countries the level of public funding of higher education is stagnating or decreasing. This has led to an imbalance between the demands that many stakeholders make on higher education, expecting a rapid reaction, and the capacity of higher education institutions to respond adequately to these demands. Research results in this area are contributing to the follow up of the recent Commission's Communication on the future role of universities in Europe.

**Research on school-to-work transitions** suggests that those at the bottom of the qualification ladder encounter substantial difficulties in entering the labour market and are the most vulnerable to economic swings. That those with lower levels of education have higher unemployment risks and greater chances of entering low-skilled, lower status and/or temporary jobs. That those who have taken part in vocational education/training tend to have a smoother transition to their first job and achieve more stable employment. Research shows that, given the diversity in education, training and labour market systems across Europe, the same policy interventions are unlikely to be equally effective in different contexts. However, early educational failure is seen to result in serious negative consequences for young people across all systems. There is a need, therefore, for policy intervention to reduce such failure and/or to provide alternative routes to skills acquisition for young people.

**Research on new governance models for education and training** indicates that the introduction of market mechanisms in education and training does not always follow a number of assumptions made by the advocates of marketisation of education. The effects that are reported include negative ones, in the sense that the introduction of market mechanisms could lead to further educational inequality and social exclusion of disadvantaged groups.

**Research on the use of information and communication technologies (ICT) in learning** shows that besides access to technology a number of other factors determine the success or failure of ICT-related educational innovation. Results suggest that educational innovation involving the use of ICT should not be considered only as a matter of access to technology or only as a matter of implementation. The use of technology in classrooms is found to be socially contextualised, interacting with the institutional and organisational cultures of schools and reflecting elements of the prevailing social relations in and around the context of use. Research demonstrates that educational institutions are social organisations that both influence the ways in which an innovation will be adopted and are influenced by that innovation.

**Research on education, inequalities and social exclusion** underlines that various factors inside and outside education cause, or at least contribute to, processes of social exclusion. These factors are intertwined and appear to be mutually reinforcing, though in different ways and at different stages in life. While education has been seen by many national governments as a major tool for tackling the issue of social exclusion, European research demonstrates that the underlying factors involved are much broader and deeper than is often understood by policy-makers and that any one area of social policy is unlikely, by itself, to be able to address the problem. Research indicates that education policy initiatives will have only limited success in removing barriers to inclusion if they are not consciously articulated with policies that address wider social and economic inequalities.

This research effort is making significant advances in knowledge that support policy-making in Europe and beyond and will continue to have an impact long after the end of the EU Fourth and Fifth Framework Programmes. Its results are also aimed at supporting the implementation of a number of EU activities and objectives; these include: the Communication *Making Lifelong Learning a Reality*; the Commission's Action Plan on Skills and Mobility; the Commission's Action Plan on eLearning; the Commission's work in relation to *The future development of the European Union Education, Training and Youth Programmes*; and the Commission's ongoing work in relation to the *Concrete Objectives of Education and Training Systems*.

Opportunities for research on learning and knowledge exist currently under the Sixth EU Framework Programme (FP6). Research in this area is supported under Priority 7 - *Citizens and Governance in a knowledge-based society*. I hope that researchers working in this area will use these opportunities to continue their enquiry into the role of education in contemporary European societies, through reinforced Europe-wide co-operation and the integration of disciplinary perspectives.

Brussels, September 2003

Achilleas Mitsos  
Director General

## Table of Contents

<a href="#">Foreword</a> .....	p. 1
<a href="#">Table of contents</a> .....	p. 3
<a href="#">Notes from the editor</a> .....	p. 5
<b>Section 1. Educational research supported by DG-Research under the Fourth EU Framework Programme</b>	
<a href="#">Immigration and Cross-Cultural Teacher Training</a> .....	p. 9
<a href="#">Student Mobility in Europe</a> .....	p. 11
<a href="#">New Approaches to Work Experience</a> .....	p. 14
<a href="#">Labwork in Science Education</a> .....	p. 17
<a href="#">Evaluation and Self-Evaluation of Universities in Europe</a> .....	p. 19
<a href="#">Government Policy on Higher Education Institutions' Economic Role</a> .....	p. 21
<a href="#">Innovations in Education and Training</a> .....	p. 24
<a href="#">University Access Policies for Adult Learners</a> .....	p. 27
<a href="#">Assessment, Effectiveness and Innovation</a> .....	p. 30
<a href="#">Higher Education &amp; Graduate Employment in Europe</a> .....	p. 32
<a href="#">Improving Early Literacy for EU Countries</a> .....	p. 35
<a href="#">Training the long-term Unemployed</a> .....	p. 37
<a href="#">Low Skills: a problem for Europe</a> .....	p. 41
<a href="#">Helping Unemployed Youths into Work</a> .....	p. 45
<a href="#">Early Learning: the impact of environmental factors</a> .....	p. 48
<a href="#">School-to-Work Transitions in Europe</a> .....	p. 52
<a href="#">Integrating Immigrant Children into Europe</a> .....	p. 55
<a href="#">Schooling, Training and Transitions: an economic perspective</a> .....	p. 59
<a href="#">Developing Learning Organisation Models in SME clusters</a> .....	p. 63
<a href="#">Lifelong Learning: implications for universities</a> .....	p. 66
<a href="#">Lifelong Learning for Older Workers</a> .....	p. 69
<a href="#">Lifelong Learning: the role of human resource development within organisations</a> .....	p. 74
<a href="#">Integrated Funding Models for Lifelong Learning</a> .....	p. 77
<a href="#">Vocational Education and Training – European Research</a> .....	p. 79
<a href="#">Competence Evaluation and Training in Europe</a> .....	p. 81
<a href="#">Small Business Training and Competitiveness</a> .....	p. 84
<a href="#">A Comprehensive Framework for Effective School Improvement</a> .....	p. 87
<a href="#">Developments towards Problem Solving Assessment Tools</a> .....	p. 90
<a href="#">Public Funding and Private Returns to Education</a> .....	p. 92
<a href="#">Learning Environments within Companies</a> .....	p. 96
<a href="#">Computer-Supported Collaborative Learning in Primary and Secondary Education</a> .....	p. 99
<a href="#">Educational Expansion and the Labour Market</a> .....	p. 103
<a href="#">Understanding Innovation in Science Teaching</a> .....	p. 107

<a href="#">Virtual Learning Environments for Higher Education</a> .....	p. 112
<a href="#">Education Governance and Social Integration and Exclusion in Europe</a> .....	p. 115
<a href="#">Shifting Skills and Wages</a> .....	p. 118
<a href="#">Migration and its Impact on the Labour Market and Education</a> .....	p. 121
<a href="#">The Potential of Tele-Guidance for Teacher Training</a> .....	p. 127
<b>Section 2. Educational research supported by DG-Research under the Fifth EU Framework Programme</b>	
<a href="#">Engaging People in Active Citizenship</a> .....	p. 133
<a href="#">Gender and Qualifications</a> .....	p. 136
<a href="#">The Education of Gypsy Children in Europe</a> .....	p. 139
<a href="#">Organisational Learning in the Chemical Industry</a> .....	p. 144
<a href="#">Children in Communication about Migration</a> .....	p. 147
<a href="#">The Role of Language in the Mobilisation of Ethnic and Immigrant Minorities</a> .....	p. 149
<a href="#">Students as “Journeymen” between Communities of Higher Education and Work</a> .....	p. 151
<a href="#">Active Participation and Informal Learning in Young People’s Transition to the Labour Market</a> .....	p. 153
<a href="#">The Impact of Women’s Studies on Women’s Employment Opportunities in Europe</a> .....	p. 156
<a href="#">Legal Framework of New Governance and Modern Policy in Education in Europe</a> .....	p. 160
<a href="#">Work Identities in Europe</a> .....	p. 163
<a href="#">Towards Sustainable Employability through Participation in Continuing Vocational Education and Training</a> .....	p. 166
<a href="#">Challenges for Education and Training Policies and Research Arising from European Integration and Enlargement</a> .....	p. 168
<a href="#">Reforming Higher Education for Lifelong Learning and Enlargement of the EU</a> .....	p. 170
<a href="#">Creation of New Occupational Patterns for Cultural Minorities: the gypsy case</a> .....	p. 171
<a href="#">Education and Wage Inequality in Europe</a> .....	p. 174
<a href="#">Higher Education Institutions’ Responses to Europeanisation, Internationalisation and Globalisation</a> .....	p. 175
<a href="#">Dual Citizenship, Governance and Education</a> .....	p. 176
<a href="#">Learning in Partnership: responding to the restructuring of the European Steel and Metal Sector</a> .....	p. 177
<a href="#">Regulation and Inequalities in European Education Systems</a> .....	p. 180
<b>Section 3. Summaries of research project clusters</b>	
<a href="#">Supporting ICT-related Learning Innovations in Schools</a> .....	p. 185
<a href="#">Impact of ICT-supported Learning Innovations</a> .....	p. 188
<a href="#">Towards the Learning Economy: conclusions from FP4 and FP5 projects to shape European policies in education and training</a> .....	p. 191
<a href="#">Social Exclusion and Equality in Education</a> .....	p. 192
<a href="#">The Role of Education in Labour Market Changes</a> .....	p. 197
<a href="#">Index</a> .....	p. 200

## Notes from the editor

This report is aimed primarily at policy and decision-makers in the wider area of education and training. It is made of Briefing Papers that summarise the results of individual projects and of project clusters that were funded by DG-Research of the European Commission under the EU Fourth and Fifth Framework Programmes.

The Briefing Papers were prepared by *pjb Associates* with funding from DG-Research and with the kind co-operation of the respective project co-ordinators.

The text of the Briefing Papers may be reproduced freely. However, the project reports that the electronic version of the Briefing Papers gives access to (abstract, executive summary, state-of-the-art report and final report of each project) remain the intellectual property of the respective research teams.

Section 1 of this report presents the Briefing Papers of projects funded by DG-Research under the Fourth Framework Programme (1995-1998). All of these projects are now finalised.

Section 2 of the report presents the Briefing Papers of the projects funded under the Fifth Framework Programme (1999-2002). At the moment that this report is going to the printers, most of these projects are still in progress and at different stages. The Briefing Papers of ongoing projects will be updated in 2004. The updated versions will be available at: <http://www.cordis.lu/improving/socio-economic/results.htm> (under *Research Results on Education and Training*).

In addition to individual projects, a number of *project clusters* were created in this area as a mechanism for getting the best results out of groups of projects on key themes, as well as obtaining other lessons for doing European-level research, which go well beyond the impact of individual projects. Section 3 of this report provides information on these project clusters. The full cluster reports can be found at: [http://www.cordis.lu/improving/socio-economic/res\\_clusters.htm](http://www.cordis.lu/improving/socio-economic/res_clusters.htm)

### **Other activities.**

DG-Research has commissioned an independent, policy-oriented synthesis of key-results from education and training projects funded under FP4 and FP5 in four thematic areas: education; training; higher education; education, training, inequalities and social exclusion. The results of this work will be available in early 2004.

In addition to the Briefing Papers of individual projects and of project clusters, a series of occasional newsletters has been produced that highlight some of the key findings of these projects (available at: <http://www.pjb.co.uk/npl/index.htm#Newsletters>)

Information on research in the wider area of the social sciences funded in FP4 and FP5 (including ed. research) can be found at: <http://www.cordis.lu/improving/socio-economic/home.htm>

More information on research in the social sciences and the humanities in FP6 (including educational research) can be found at: <http://www.cordis.lu/citizens/>

For further information in relation to this report or in relation to EU-supported educational research:

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[Back to table of contents](#)



## **Educational Research Supported by DG-Research under the Fourth EU Framework Programme**

The Fourth EU Framework Programme (FP4, 1995-1998) was a landmark in European research policy. It was in FP4 that research in the social sciences was recognised for the first time as an area eligible for EU funding.

Research in the social sciences was supported under the *Targeted Socio-Economic Research Programme* (TSER), one of the nineteen specific programmes comprising FP4.

The TSER Programme funded a total of 162 research projects and thematic networks, 38 of them in the wider area of education and training.

There were three different Calls for Proposals in the lifetime of the TSER Programme. The projects funded as a result of the Third Call started in late 1998 and were finalised in 2002.



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This research project has been funded by DG-Research under the *Targeted Socio-Economic Research* (TSER) Programme of FP4

**Context of the Research**

During the 1990s many countries of Europe have experienced voluntary and involuntary inward migration that has resulted in pressures and raised issues concerning integration and educational policies for immigrants. Education is strategically important for integrating foreign newcomers into the society of their new residence.

This research has been conducted in the context of the on-going political debate within the European Community about drawing up common European immigration policies. This search for a common European approach is timely as the mobility of people within the EU countries is being encouraged.

**Key Conclusions**

The following conclusions are based on research into immigration settlement policies and cross-cultural teacher training conducted in six countries – Finland, France, Germany, Greece, Israel, and the United Kingdom:

1. Teacher-training institutions do provide the students with the competencies required to function effectively in relation to the goals expressed in the national policy programmes and curricula. However, since national policies and curricula vary widely, so does the nature and content of the training courses across the countries.
2. With the increase in trans-national mobility, European higher education institutions need to review their current policies and practices and to support the recognition and acceptance of ethnic and cultural diversity.
3. Efforts need to be made to develop teacher training that can provide students with cognitive powers, attitudes and operative competencies required to function effectively in multi-cultural environments.
4. There is a need for educational research in order to provide empirically validated knowledge needed to improve “culturally responsive education” and, thus, the academic performance of immigrant pupils.
5. There is a need for international comparative studies in order to clarify and compare educational goals and practices in different countries.

The project also drew conclusions specific to each country.

1. In Finland, the project results suggest that the biggest challenge is the improvement of the *behavioural* teaching competence of teachers working in a culturally diverse environment.
2. In France there is an urgent need to integrate intercultural education in a more systematic manner within the teacher training structure.
3. In Germany, within an ongoing debate about whether Germany is an “immigration country” or not, this project showed that teacher trainees prefer a pluralistic society as they are confronted with lots of pupils who come from other countries. Policy-makers should no longer deny this fact.
4. The Greek educational system ought to turn from its “introvert” orientation to a more “extravert” one.

5. In Israel the long-range intentions of the government to provide a homeland for Jews from any place in the world, who are in need of asylum, is undermined by misleading interpretations of officials at different levels of the hierarchy and by confusing implementation in the Ministry of Education. The research also noted that students do not acquire a clear view of the implications of multiculturalism from simple exposure. Clear formulations of the policy and its publication are necessary as basic information to students.
6. In the United Kingdom the project robustly considered that cross-cultural teacher training can provide students with cognitive powers; can appropriately modify their attitudes towards people of other ethnic groups and can equip them with the operative competencies required to function effectively in multi-cultural classrooms. However, it revealed that, even among a highly educated sample of trainee teachers, there was a disturbing lack of knowledge about the major ethnic minority groups in Britain, for example. This lack of knowledge extended to such fundamental matters as the legislative framework erected by successive governments to control entry and to encourage good race relations.

## **Key Recommendations**

The project made the following recommendations relevant across the European Community:

1. A concerted effort needs to be made to ensure that the regulations governing the training of *all* teachers should be amended to include knowledge and skills in multicultural teaching.
2. Concerted efforts need to be made within the European Community to search for commonly acceptable standards for teacher training, in order to equip teachers with the multicultural competencies required to function effectively in culturally diverse environments.

## **The full title of the project is:**

*Immigration as a Challenge for Settlement Policies and Education: evaluation studies for cross-cultural teacher training.*

## **The final report and results of this project are available:**

[Full final report](#), [Abstract](#), [Summary](#), [Partner details](#)

## **Key Publications**

Pitkänen, P., Kalekin-Fishman, D. & Verma, G. (eds.), *Education and Immigration: settlement policies and current challenges*, Routledge Falmer, London-New York, 2002.

Pitkänen, P., Verma, G. & Kalekin-Fishman, D. (eds.), *Increasing the Cultural Understanding of Student Teachers*, Routledge Falmer, London-New York, August 2003.

[Back to table of contents](#)

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This research project has been funded by DG-Research under the *Targeted Socio-Economic Research* (TSER) Programme of FP4

**Context of the Research**

Student mobility and accompanying academic recognition are assumed to be necessary prerequisites for an open and dynamic European educational area that will aid European integration and labour market mobility. However, for students to be mobile they have to have access to higher education and the financial resources to enable them to study abroad.

This research was conducted in five countries – France, Germany, Greece, Sweden and the UK. It explored the relationship between higher education admissions policies and practices at national and university levels and related these to student mobility.

Mobile students have been defined as those who study abroad for either a degree or for a period of time. The mobility can be organised by another body or by the students themselves (self-organised or 'free-movers').

**Key Conclusions**

The following conclusions were drawn:

1. National policy relating to student mobility ranged from a focus on inward to a focus on outward mobility:
  - In both France and Britain it is focused on inward mobility, especially of non-EU students.
  - In Germany, there are also elements of this approach, but outward mobility of German students is promoted as well.
  - In Sweden, policy focuses on both outward and inward student mobility and in contrast to France, Britain and Germany, stresses mobility as a means of trying to ensure international understanding and peace.
  - Greece has a long history of outwardly mobile students.
2. In Germany, Sweden and the UK the need to recruit 'free-moving' students was a factor that affected university policy and practice. In some countries this was to remain viable, whilst in others it was tied in with the university funding mechanisms.
3. Two main strands of specific activities were evident:
  - Student mobility agreements - which may be linked with teaching innovations.
  - Programmes of European/international research.
4. Within these strands, a range of innovations were found:
  - Compulsory foreign language elements in courses.
  - New degree courses/international courses.
  - A new European dimension introduced into courses.
  - Language courses in the official language of the country.
  - Language courses in other languages.
  - Teaching in languages other than an official language of the country.
  - Induction/orientation courses for students new to the country.
  - Ongoing cultural/social programmes throughout the period of study.

5. Differing policies at a national level can impact on mobility e.g. Sweden has portable grants and loans, which, in theory means there are more opportunities for Swedish students from lower socio-economic status backgrounds to study abroad than for students from other countries.
6. Three key barriers common to all countries were identified:
  - Language
  - Finance
  - Recognition of qualifications and/or admissions procedures
7. Other barriers included:
  - Cultural/attitudinal barriers.
  - Concern at an institutional level about quality and standards at institutions in other EU countries.
  - Different attitudes towards mobility by more and less prestigious institutions.

## **Key Recommendations**

The project made the following recommendations including possible solutions to the barriers that have been identified:

1. Language – a number of recommendations were made to develop and reinforce language training. Specific recommendations included:
  - The EU adopting a more comprehensive policy concerning foreign language instruction.
  - At the national level, promoting the teaching of widely spoken EU languages in secondary education.
  - At an undergraduate level, EU funding under the Socrates Programme could be used for the development of ‘project-based’ student exchange schemes directly related to the linguistic preparation of outgoing students in the language of the host country.
  - Instruction of at least some core courses in widely spoken European languages would attract incoming students towards institutions where less widely spoken languages prevail.
2. Finance – Various recommendations were made to increase funding for both student scholarships and mobility of teaching staff including: providing incentives for the private or voluntary sectors to invest in student mobility; differential incentives to encourage lower income and less prestigious institutions to participate; additional funding to encourage students to high cost areas and more scholarships to facilitate mobility among outgoing and incoming students from lower income families. Other specific recommendations included:
  - Developing a fully portable financial support/loan scheme in the EU for students who wish to take a full course in another EU country.
  - Consideration of an EU-wide economic compensation scheme for uneven exchange of admissions as happens with the Nordic agreement.
3. Recognition of qualification and/or admissions procedures. Various recommendations were made:
  - Better explanation to students of the credit transfer system (ECTS) in operation for Socrates Erasmus exchange programme.
  - Revise the university calendars across European universities so that there are more consistent start and end dates for the academic year/semesters/terms.
  - Instigate a centralised body for the recognition of modules or courses, with a ‘recognition ombudsman’ at each university.
  - Give all EU higher education institutions the right to accept all the foreign students they want within the total of allowed students.
  - Facilitate greater interaction across the EU between those involved in organising exchange programmes and those involved with admissions to ensure greater understanding of issues related to academic standards.
  - Involve academics on a regular basis with exchange schemes for course recognition and evaluation.
  - Agencies responsible for quality assurance across the EU need to liaise closely with one another. The Sorbonne Declaration provides an ideal context for this to take place.
  - Develop a common (regional) educational space as found in the Nordic countries.

4. Other incentives to improve mobility include a ‘reward’ system for mobility in the careers of teaching staff.

**The full title of the project is:** *Higher education admissions and student mobility in the EU.*

**The Final Report and results of this project are available:**

[Full final report](#), [Abstract](#), [Summary](#), [Partner details](#)

### **Key Publications**

Berning, E., “Hochschulzulassung und akademische Mobilität: Ergebnisse einer Studie in fünf Staaten der EU”, *Beiträge zur Hochschulforschung*, 1-2001.

Ericsson, E., “*Demands for Intercultural Communicative Competence in Working-life: some experiences of Swedish higher education co-operation with Baltic neighbour Estonia* in C.Velde (ed.), *International Perspectives on Competence in the Workplace*, Kluwer Academic Publishers, the Netherlands, 2000.

Lauterbach, H., “Internationalisation in higher education: the conceptual profile in the recent discussion”, *Beiträge zur Hochschulforschung*, 1-2001.

West, A., “HE admissions and student mobility within the EU ADMIT”, *World Views*, Issue 2, Spring 2000.

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[Back to table of contents](#)

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**Context of the Research**

The nature of work is changing due to the quickening pace of global scientific and technological innovation and the use of information and communication technologies. The scale and impact of global multinational activity and the process of industrial convergence have also exerted pressure for industrial, organisational and occupational change.

Distinctions between formal and informal contexts of learning are being challenged and innovative developments like “learning organisations” have emerged, all of which has an impact on the future role of work experience. Yet there is evidence that the true learning potential of work experience is not fully understood.

This research into the work experience for 16-19 year olds was conducted in six countries – Denmark, Hungary, Ireland, Spain, Sweden and the United Kingdom. It examined the purpose and assumptions about learning, and the practice and outcomes of work experience in the light of changes in the European labour market and trends in workplace requirements and organisation. An intensive exploration of learning theory has been undertaken and innovative approaches to work experience have been analysed through a number of case studies.

**Key Conclusions**

1. Five models of work experience were identified which reflect the different economic, technological and social factors prevailing within European countries as well as different ideas about learning and development. These different models can and do co-exist within the same country:
  - Traditional - ‘launching’ students into the world of work.
  - Experiential - as ‘co-development’.
  - Generic - as an opportunity for key skill assessment.
  - Work process - a strategy to assist students in ‘attuning’ to the context of work.
  - Connective - a form of reflexive learning.
2. Overall, there is a poor relationship between policy and practice, a lack of clarity in relation to the aims and objectives of post-16 work experience, its delivery (in particular, a lack of clarity in relation to workplace supervision, mentoring and teaching, the availability and quality of placements), a lack of evidence in relation to learning, the role of employers (the quality of relationships between employers and education, the nature of qualifications sought, the degree of attention to changing nature and modes of work).
3. There is renewed emphasis upon learning in the workplace, which tends to be tackled in one of two main ways based upon the following limited assumptions:
  - That the main purpose of work experience is to help young people to learn how to reproduce pre-existing activities, rather than to encourage them to learn and develop by ‘putting things’ into different contexts
  - That learning in the workplace is best supported through involving young people in planning a work experience placement and managing and evaluating the learning through the use of statements about ‘learning outcomes’.

4. However, the push to make work experience more widely available to young people has tended to address new issues about skill development by relying on old models of learning in the workplace.
5. Work experience should no longer be viewed as developing a technical competence in ‘something’ nor as providing an opportunity to use ‘learning outcomes’ as though they capture in some way the authentic knowledge/skill developed by a young person in a specific situation. Increasingly, work experience should be viewed as a means of developing an involved sense of responsibility.
6. The dominant interpretation of ‘transfer’, which stresses ‘the degree to which a behaviour will be repeated in a new situation’, is insufficient. The concept of consequential transitions is necessary, which recognises an extra dynamic in the process of exploring new territory in which pre-learned responses and solutions are unavailable. Such transitions may involve changes in identity as well as changes in knowledge and skill thus involving the full person and not just learned attributes or techniques.
7. Increasingly, workers are expected to act as ‘boundary crossers’ between “activity systems” - to possess the ability to contribute to the development of new forms of social practice and to produce new forms of knowledge. This entails learning how to contribute to the transformation of work contexts.
8. Therefore, the innovative ‘connective’ model of pedagogy and learning in work-based contexts should be developed.
9. Work should not be solely a context which students learn *about*; it is a context *through which* students can learn and develop. This shift of focus can direct attention to how individuals learn, grow and develop through the strength and richness of their interactions and applications within and between different contexts.
10. As a result of these conclusions there is a need to re-think the function of work experience in post-16, as well as in higher education.

## **Key Recommendations**

The study made the following recommendations:

1. The current policies on work experience should be informed by what is known about *learning* as well as what is known about changes in work.
2. Businesses, educational and vocational institutions should practically respond by using and developing the “connective” model of learning through work experience. It offers ways of:
  - Connecting formal and informal contexts of learning - relevant in course development.
  - ‘Mediation’ between formal and informal contexts of learning that are fundamental in achieving an effective relationship between classroom learning and workplace learning and can be developed by teachers and workplace educators/trainers in partnership.
  - Considering quality through the identification, development and transfer of learning that goes well beyond the ‘checklist’ approach to quality issues. The framework should be developed in the school/workplace context and in the context of the connective model.
3. Change in educational institutions and in businesses in relation to education-business partnership innovation should also take account of such innovation – often involving applications of the learning technologies at the ‘periphery’ –in the knowledge that ‘innovation without change’ is ubiquitous.

## **The full title of the project is:**

*Work Experience as an Education and Training Strategy: new approaches for the 21<sup>st</sup> Century.*

## **The Final Report and results of this project are available:**

[Full final report](#), [Abstract](#), [Summary](#), [Partner details](#)

## Key Publications

Griffiths, T. and Marhuenda, F., “Interpretation of the relevance of work experience for future oriented educational strategies as a challenge for research” in *Qualifications, competences and learning environments for the future: European Reference Publication*, Thessaloniki, CEDEFOP.

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[Back to table of contents](#)

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**Context of the Research**

Within the broader issue of motivating young people to study science is the issue of the cost of practical activities in laboratories. Experiments through "labwork", as science teachers know it, tend to be an expensive component of science education across Europe. It is also felt that labwork is not used effectively within the classroom.

This project based on seven European countries - Denmark, France, Germany, United Kingdom, Greece, Italy and Spain - focused on the use of labwork in teaching biology, chemistry and physics - to students in academic science streams, in the years of upper secondary schooling and the first two years of undergraduate study. It examined the effectiveness of labwork and developed approaches designed to promote more effective teaching and learning outcomes.

This has resulted in twenty-three "labwork" case studies from five European countries - where the teaching device is carefully chosen based on clear objectives and underlying principles. The case studies contain:

1. In-depth analyses of students' thinking during standard labwork with the aim of improving the process of modelling.
2. Observation of open-ended projects.
3. Labwork sessions focused on unusual objectives like data handling, epistemological objectives and students using their own initiative.
4. A comparison of labwork with and without computers, in order to emphasise the process of modelling.

**Key Conclusions**

1. It was observed that there is considerable diversity in the organisation of science teaching in terms of:
  - Whether science subjects are optional or compulsory.
  - The extent and nature of central control of the upper secondary science curriculum in terms of time allocations and assessment structures.
2. Although use of demonstrations by teachers in academic streams of upper secondary students is common in all countries, the amount of labwork does vary in the following ways:
  - Regularly performed by upper secondary students. (Denmark, UK and France).
  - Depends on the wishes of individual teachers (Germany).
  - Rarely performed (in Italy in specific schools and in Greece only at university level).
3. At university level, labwork is commonly used in all countries and for all disciplines.
4. However, the objectives of labwork tend to be limited and lack variety, often only focusing on specific concepts.
5. Despite many teachers' wishes, open-ended project work is rarely practiced. The most frequent type of labwork tends to be in small groups of students working with real objects/materials following very precise instructions about methods and analysis given by a teacher or a written source (referred to as a 'labwork sheet').

6. This also results in labwork being mainly assessed by grading reports according to the quality of the students' descriptions of the way in which tasks were performed, data acquisition, discussion of the quality of data and interpretation of experimental results.
7. At upper secondary school, the students normally have to use standard procedures, to measure, and to report observations directly. They do not have to present or display or make objects, nor explore relationships between objects, to test predictions or to select between two or more explanations.
8. Even at university, it is rare for students to have to test a prediction made from a guess or a theory or to account for observations in terms of a law or theory, although sometimes in physics, students are asked to test a prediction made from a law.
9. The similarities both between disciplines and countries in terms of typical labwork is more than might be expected, given the differences in educational systems in each country.
10. From a survey carried out in all the countries, teachers considered the main objective of labwork as being able to "link theory to practice", with the objectives of "learning experimental skills" and "getting to know the methods of scientific thinking" also being rated. Experiments carried out by the students were seen as overwhelmingly useful for promoting all learning objectives of labwork.
11. However, based upon another survey directed at both teachers and students it was concluded that a positive attitude towards science is rarely promoted with labwork generally failing to address important scientific questions like how to:
  - Recognise the validity of results.
  - Design an experiment.
  - Choose the relevant method to process data.

## Key Recommendations

Specific recommendations from this study are:

1. Labwork should address a broader range of learning objectives than the range currently addressed. In particular, labwork rarely addresses epistemological objectives and teachers rarely make these objectives explicit when designing labwork activities, sequences of labwork or labwork sheets. Similarly, conceptual objectives, procedures to be learnt, data collection and processing are generally left implicit in the design of labwork.
2. Labwork should be better designed with more specific targets aimed at meeting clearly defined learning objectives. There should be fewer objectives for each labwork session and a more coherent overall organisation of labwork, which should lead to improvements in student learning.
3. There is a need to improve the design of assessment along side the design of more effective targeted labwork.
4. Improvements to labwork practices need to be addressed at teacher education level. In particular, teachers should be trained to identify effectiveness by better understanding of:
  - What is learnt
  - What processes consciously go on in students' minds, when putting into operation procedures and methods as well as developing models and theories.

This should lead to an improved image of science and a better motivation for it.
5. Collaboration between researchers, teachers and policy-makers should be one of the key aims of research in Science Education in Europe over the next few years.

**The full title of the project is:** *Improving Science Education: issues and research on innovative empirical and computer-based approaches to labwork in Europe*

**The Final Report and results of this project are available:**

[Full report](#), [Abstract](#), [Summary](#), [Partner details](#)

[Back to table of contents](#)

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**Context of the Research**

Since the 1980s all European countries have been experiencing major changes in higher education largely characterised by a transition from an "élite" university system to one of "mass" higher education. This has produced a dramatic growth in higher education provision evidenced by an increase in the number of institutions, number of students and consequently number of teaching staff. This trend has been amplified and strengthened by changes in the diffusion of knowledge, and in disciplinary differentiation and fragmentation over the last century. These latter changes became exponential in the 1980s and 90s and have resulted in the enlargement of academic fields and structures.

This project was conducted in eight countries - Germany, Spain, Finland, France, Italy, Norway, Portugal and the United-Kingdom in the context of the rapid growth in the higher education sector, an increasing interest from government in the societal importance of universities, and a relatively new interest within EU countries of the systematic evaluation of teaching and learning.

**Key Conclusions**

1. Three distinct types of university were identified:
  - General universities.
  - Professional/vocational universities.
  - Local universities.
2. Therefore, a single mode of evaluation is insufficient to meet the diverse needs of institutions.
3. External evaluation, made by public bodies in all the countries of the project, is a relatively recent phenomenon, but it is one that is here to stay.
4. Universities appear to accept the primary driver of accountability for public funding as a reasonable rationale for systematic evaluation.
5. In addition to external evaluation, universities are continuing to develop internal evaluation. External and internal evaluation interact to inform the development of strategies within universities to improve the quality and performance of teaching and research, and to provide improved levels of service to users, as well as ensuring best use of financial resources.
6. The reasons for the development of effective evaluation were identified as:
  - External evaluation ensures that universities adhere to the requirements of the public authorities that fund them.
  - Universities are relatively autonomous institutions and are evaluated, and evaluate themselves partly as a means of establishing their credibility in order to attract funding from sources outside of the public funding regime.
  - Evaluation can be used by universities to manage tensions in strategy and direction such as those between the demands of traditional teaching, profession-oriented teaching, and continuous training. In research there are tensions between fundamental and applied research, and there are also tensions between the demands to increase the participation rate in higher education and participation in cultural and economic local development.

7. External evaluation is able to provide a basis for change if it finds support with senior management and a strong university governing body makes use of evaluation and is strengthened by it.
8. A significant number of universities have developed a new government model – presidential-managerial – to replace the traditional model - collegiate and/or bureaucratic.

## **Key Recommendations**

The project made the following recommendations:

1. Improve “objective and results” based evaluation tools as there is a trend to link funding to objectives and results through internal contractualisation between universities and government and within university organisational units that can generate new modes of funding.
2. Find ways of improving the “quality assurance procedures and methods” of administrative and support services as most innovative practices relate to the quality of services delivered to users (teachers, students, and external agencies).
3. Develop effective “computerised information systems” that enable the measurement and realisation of improvements.
4. In the context of a contractualisation with public authorities, encourage across EU institutions, partnership with other universities that develop mechanisms for “teaching and organisational” evaluation.
5. Develop a new model of evaluation that is:
  - Pluralistic - recognises a range of local, national, and intentional factors.
  - Contextual - the specific university environment.
  - Dynamic - takes account of the university objectives and history.
  - Integral - makes use of links between all university activities.

**The Final Report and results of this project are available:**

[Full Final report](#), [Abstract](#), [Summary](#), [Partner details](#)

## **Key Publications**

Boffo, Trinczek & West (eds.), *Evaluation of Universities in Europe: strategies, fields and objectives*, 1999

Fave-Bonnet, Gueissaz, Häyrinen-Alestalo, Hostmark Tarrou & Simonyi (eds.), *Evaluation of Universities in Europe: actors and institutions*, 1999.

[Back to table of contents](#)

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**Context of the Research**

The transformation of national higher education systems is on the political agenda in every country in Europe. The higher education (HE) sector is being urged to 'modernise', 'adapt', 'diversify', 'marketise', and is expected to become 'entrepreneurial', 'competitive', more 'efficient' and more 'effective', more 'service oriented', and more 'societally relevant'. It also has to improve the 'quality of its processes and products', its 'relationship with the labour-market', and the 'governance and management' of its institutions, the universities and colleges. It is generally acknowledged that this transformation can only be successful if the traditional steering relationship between state authorities and higher education institutions is changed dramatically.

During the last quarter of the 20th century the central steering role of the European nation-states with respect to higher education, has become a serious issue of debate. This debate is part of a general 'reshuffling' of relationships between the state and the public sector. Arguably, higher education is one of the sectors where this 'reshuffling' has been most extreme and most successful.

In particular the socio-political demands and expectations with respect to higher education have grown - especially concerning its economic role - whilst at the same time in most countries the level of public funding of higher education is stagnating or decreasing. This has led to an imbalance between the demands many stakeholders make on higher education, expecting a rapid reaction, and the capacity of higher education institutions to respond adequately to these demands.

This project has focused on developments in national policies with respect to the economic role of higher education, and on changes in the balance between government steering strategies with respect to higher education and institutional autonomy in Europe. It has examined changes in the areas of undergraduate programmes, lifelong learning and governance structures in Austria, Belgium/Flanders, Finland, Italy, the Netherlands, Norway, Portugal, and the United Kingdom/England.

**Key Conclusions**

The following conclusions were reached at national and institutional levels:

1. The economic crisis of the late 1970s, early 1980s led to a growing interest on the government side in the economic role of higher education.
2. A general move to a 'supermarket steering' model has been observed. The state is becoming less dominant in steering HE and the (quasi) market is becoming more influential. However, in none of the countries a "pure" market approach has been introduced. The current steering approaches with respect to higher education can be described as hybrid.
3. Whilst HE institutions appear to have increasing autonomy, governments, through regulation, appear to wish to ensure that this autonomy is used by institutions to achieve specific political expectations.

4. Recently innovations in national higher education policies have led to a partial ‘de-instrumentalisation’ of higher education and a renewed interest in other, e.g. social, and cultural, roles of higher education.
5. Effective structures for monitoring the implementation of national higher education policies or programmes are rare.
6. Institutions are still learning what it means to be a public service enterprise and are still in the process of developing approaches and methods to manage their resources effectively.
7. Factors such as inherited staff and resources, common practice and values, subject mix, and management approaches have constrained institutions and profoundly affected their market position.
8. The impact of governments on academic programme development in first-degree education is rather limited.
9. Governmental attempts to influence university and college developments in the area of lifelong learning can in general be described as wishful thinking.
10. Especially in Continental Europe the traditional bilateral relationship between higher education and the state is rapidly becoming a multilateral relationship between higher education and various external actors, including the Ministry of Education.

### **Key Recommendations**

The project made the following recommendations:

1. In order for governments to ensure that policy processes are more effective they should acknowledge that the role of politics is to design, adapt, and monitor the ‘framework’ conditions within which HE operates.
2. Appropriate HE professionals should be deliberately involved in policy making.
3. Higher education institutions should be expected to operate autonomously in implementing policies and realising HE goals within the agreed framework.
4. Politics should not interfere in the detailed operation of HE institutions.
5. Governments should develop more effective monitoring structures for evaluating and analysing the ways in which higher education policies are handled in practice.
6. If politics wishes to influence the policy process i.e. policy development and policy implementation, it is important that individual politicians should become active in professional networks.
7. An independent, de-politicised European higher education policy monitor should be established to provide data for future research on HE.
8. Further comparative and longitudinal research on issues relating to change processes in HE is required.

### **The full title of the project is:**

*Governmental Policies and Programmes for Strengthening the Relationship between Higher Education Institutions and the Economy.*

### **The Final Report and results of this project are available:**

[Full Final report](#), [Abstract](#), [Summary](#), [Partner details](#)

## Key Publications

Gornitzka, "Governmental policies and organisational change in higher education", *Higher Education*, Vol. 38, 1999.

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[Back to table of contents](#)

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**Context of the Research**

There are continuing demands on education and training to explore ways of improving learning and widening access to learning opportunities, including access for less favoured and excluded groups. This provides opportunities to develop new approaches to innovations in education and training.

This project has aimed at deepening the understanding of educational innovations. It has gathered empirical evidence of innovative education and learning arrangements and developed specific methodologies and guidelines for enhancing the design, implementation and evaluation of learning innovations. It has specially explored the issue of social disadvantage and exclusion, with a particular emphasis on exclusions from education and training.

It has developed a new approach to innovations in education and training based on the idea of “learning patrimony” and the impact upon this by a set of social, cultural and, above all, political and economic factors. Learning patrimony is defined as:

- A modus operandi that is a series of prevailing socio-institutional and educational practices, pedagogic arrangements and relations.
- A set of values, dispositions, attitudes and expectations in regard to education and training.

**Key Conclusions**

The key conclusions are:

1. There has been a fundamental “clash” between the view of education as an end in itself for living a human life and the view of education as a mere instrument of the economy and people as workers.
2. Policies in western countries are characterised by disengagement of the state from the economy and increasing involvement and intervention in education and training at all levels.
3. Intervention in education has generally been based on an economic rationale and focused on “re-designing” legislative arrangements in terms of different forms of centralization-decentralization.
4. There has been a transfer control of services and resources from the professionals of education to managers from the business field. This has involved a major restructuring of the professional culture, working practices, college management styles and conditions of service, including the employment conditions of the teaching staff.
5. Performance models of assessment and systems of vocational qualifications based on “measurable competencies” has resulted in a specific pedagogy where learning objectives have to be stated in such a way that they can be unequivocally measured.
6. This has resulted in a conflict between the “democratic views of accountability” (education has to “respond” to society and its members) and economic or market-driven views of accountability (Judged in terms of the market).

7. Despite strong resistance from educational institutions and professionals, there has tended to be a convergence towards a process whereby values, criteria and procedures from the world of production are transferred, imposed or borrowed by the education and training sectors.
8. Education and training is experiencing a series of tensions coming from economic and political spheres. Whilst, some of these tensions can be creative and give rise to genuine innovations, others can considerably disrupt existing arrangements and do not contribute to innovations.
9. Many opportunities for innovation are related to the introduction and deployment of ICT in education and training, particularly when it is embedded in well-organised pedagogic practice and institutional arrangements.
10. A balance between student-centred approaches and more teacher-centred education is still an unresolved 'big issue' in the schools sector.
11. Overall, pedagogic innovation is a less developed aspect of innovations in education and training.

## **Key Recommendations**

The project made the following recommendations:

1. Policy-makers' decisions should be informed at a more general level by the reforms and innovation cycle of each country/sector.
2. Foster innovative networking and partnership arrangements by:
  - Encouraging public institutions to support the setting up and running of innovative partnerships, and facilitating their medium and long-term sustainability.
  - Granting more autonomy to higher education institutions for modification of their internal structures. In particular fostering university-industry partnerships in critical scientific-health-industrial sectors is a key need.
3. Develop current efforts being made in the higher education sector by:
  - Networking public centres (e.g. museums, libraries) and facilitating easy access to such resources for home-based students.
  - Developing new territorial multimedia resource centres as student meeting places and self access resources.
  - Supporting pedagogic research in virtual teaching.
4. Address the needs of schools as a whole by:
  - Revising national curricula and encouraging the integration of current worthwhile innovations.
  - Supporting the teaching profession in their efforts to develop the school model.
  - Changing the curriculum to allow full institutionalisation and integration of ICT.
  - Developing new evaluation and accountability models that make the school more responsive to society as a whole.
5. Encourage the use of ICT in both schools and higher education institutions by:
  - Revising the national curricula and programmes to encompass online teaching and learning.
  - Encouraging institutions to envisage and implement inter-departmental re-design and collaboration, including collaboration between teachers, domain experts, animators and other rapidly emerging teaching functions, both within and between institutions.
  - Encouraging the setting up of joint programmes between institutions (both schools and universities).
6. Improve continuous vocational training and skills updating by:
  - Defining wider frameworks, which allow both employees and unemployed to benefit from the training on offer.
  - Encouraging collaboration between educational and training institutions and private sector companies.
  - Strengthen the position of older and low skilled employees in the corporate setting.

Specific policy recommendations related to social disadvantage and on the provision of training for unemployed and disadvantaged groups:

7. Improve the position of organisations and community centres providing training and other services to the unemployed and disadvantaged within the tendering processes by:
  - Increasing the representation and involvement of small providers for the disadvantaged in decision-making structures and bodies.
  - Providing information and training to small providers and associations about how to access and bid for funds, and how to manage projects.
  - Encouraging and facilitating greater collaboration and association among the small organisations and centres providing for the disadvantaged.
  - Encouraging innovation at the level of organisational arrangements and partnerships.
8. The principles of efficiency and need should be combined, and needs-based policy decisions sought, so as to ensure that providers closer to the unemployed access the funds available.
9. Induce work through the provision of worthwhile quality training by:
  - Combining current Labour Market Supply Efficiency & Labour Market Performance Indicators with new Labour Market Indicators such as Job Gaps Indicators and Wages Gap Indicators.
  - Designing and delivering worthwhile, quality training for the unemployed and disadvantaged.
  - Replace 'job-inducing' training schemes with quality training programmes.
10. Improve the funding and monitoring of training initiatives for the unemployed and disadvantaged by:
  - Setting up a funding framework, which provides both stability and efficiency.
  - Using both quantitative and qualitative measures as indicators of performance.

**The Final Report and results of this project are available:**

[Full final report](#) [Summary](#) [Partner details](#)

### **Key Publications**

Darmon, Frade & Hadjivassiliou, “The comparative dimension in Continuous Vocational Training: a preliminary framework”, in a book about continuous vocational training in Europe, Polity Press.

“Educational Innovation and Educational Policy: the UK Educational Policy Framework in Comparative Perspective”, in the *Comparative Education* journal.

Article for “Reports on the World of Employment”: *Learning Innovations for Corporate Training*, August 1998.

[Back to table of contents](#)

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This research project has been funded by DG-Research under the *Targeted Socio-Economic Research* (TSER) Programme of FP4

**Context of the Research**

Economic and social changes across Europe, brought about by the transition to a knowledge society, have highlighted the need for the development of lifelong learning and promotion of social inclusion. This knowledge society has introduced a new form of inequality based on the acquisition, or not, of knowledge: 'the haves' and the 'have nots'. Universities have traditionally been the domain of younger, and on the whole, white, middle class students. If Europe is to compete economically on a global scale a wider range of people need to be given opportunities to access knowledge at university level.

There are signs that European universities are responding to these social and economic changes - expansion has generally been the pattern in many European universities moving the system as a whole to one of mass higher education. However, wider access to higher education is not an automatic outcome of this expansion. The widening access debate is concerned with who gets in and who is left out.

This project conducted in six European countries: Belgium, Germany, Ireland, Spain, Sweden and the UK, focuses on the effectiveness of access policies and practices for adults in universities and higher education institutions across the European Union. The project has paid particular attention to socially excluded groups and communities and identifies barriers to the participation of the excluded.

**Key Conclusions**

The following conclusions were reached:

1. Access to university lifelong learning is not equal across Europe ranging from virtually impossible (Spain) to relatively open (UK).
2. The picture also varies within countries, as some institutions - the newer ones - are more open than traditional elite universities.
3. Non-traditional students are more likely to be found in the social sciences and humanities rather than the sciences, reflecting departmental attitudes as well as student choice.
4. The participation, or not, of non-traditional adult students in higher education is a complex issue. This complexity results from the interaction between national policies, institutional policies and practices, and student experiences.
5. For many non-traditional adult students returning to learn in higher education is a risk and at the point of entry many participants found entering a university campus daunting, not only because of the size and impersonal systems but also because the participants were unsure of themselves as learners. Many felt vulnerable particularly during the first few weeks and some had contemplated leaving due the challenges of adopting the student role, familiarising themselves with academic language and an underlying concern about the demands of working at degree level.

6. Some students (e.g. in the UK) stated that if there had not been an induction day for mature students before the academic year began, they would not have had the courage to enter campus on the first day of term. This points to the need for support structures, such as induction days, a common room for adult students, and supporting written materials to help them with the transition from non-learner to undergraduate student.
7. Financial issues, such as course fees, student loans or having to cope on social benefits, also made study a risk with no guarantee of obtaining employment at the end of study.
8. Many students wanted more contact time with personal and course tutors.
9. In relation to assessment, attitudes were contradictory. While many stated that they preferred assigned essays to examinations as the latter reminded them of school, and made them feel nervous they also felt that assigned essays were time-consuming.
10. Despite the difficulties, such as finance and finding time to study, the majority enjoyed learning as they felt it empowered them. Many non-traditional students said that they experienced personal change, were more informed by knowledge and viewed the world in a different way. Others hoped that their engagement in learning would encourage their children to study.

### **Key Recommendations**

A number of policy recommendations at European, national and institutional levels have been highlighted by the research findings:

1. There needs to be recognition by policy-makers that non-traditional adult students are heterogeneous by age, gender, ethnicity and mode of study. Different institutional and curriculum structures are required to meet the differing needs. This includes offering programmes taught in both the daytime and evening for full and part-time students and classes within the school day for others.
2. There is a need for more flexible systems at both the point of entry and during the course. For example, entrance examinations are a major barrier. Greater use of access qualifications and use of Accreditation of Prior Experience and Learning (APEL) and Accreditation of Prior Learning (APL) would enhance access across all member states.
3. Funding should be available to facilitate the participation of all age groups so that there is no upper age limit as currently exists in some countries.
4. Crèche and/or nursery provision is a key enabler for many non-traditional students and should be made available free of charge or at subsidised rates.
5. Greater links between HE institutions and other adult education providers should be formed to promote routes for progression and mechanisms to aid transition.
6. Non-traditional students should be integrated with mainstream younger students. This has many implications for institutions such as the need to change the timing of classes across the whole institution to enable attendance. The development of improved support systems (tutor contact, study skill support etc.) and more feedback regarding students' work. At the heart of many of these issues is the need for training and staff development for lecturers to raise awareness of the learning needs of non-traditional students and to highlight best practice.
7. Induction sessions are needed for new students to familiarise them with the locality and use of facilities such as the library and ICT facilities.
8. There is a need to work towards a more common European framework for collecting institutional and national data on students.
9. There is a need for a more integrated European wide policy framework that recognises the importance, value, and economic and social gains for the EU of access, participation and social inclusion. There needs to be investment in the form of grants and subsidies to enable improved policy and practice.

10. There needs to be encouragement for employers to support their employees who participate in HE regardless of the subject area of study. This support could be in a number of forms such as financial assistance or time off to study.
11. The research also indicated the need for further study in the following areas:
  - Tracking of non-traditional students after leaving university in terms of employment, further study, and their personal development as learners.
  - Identification of successful models of learning and teaching for non-traditional students.
  - The impact of financial policies and issues and their implications for student success and failure.
  - University, Departmental and lecturer attitudes towards non-traditional students.
  - The relationship between lifelong learning and social capital.

**The full title of the project is:**

*University Adult Access Policies and Practices across the European Union and their Consequences for the Participation of Non-Traditional Adults.*

**The Final Report and results of this project are available:**

[Full Final report](#), [Abstract](#), [Summary Partner details](#)

[Back to table of contents](#)

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This thematic network has been funded by DG-Research under the *Targeted Socio-Economic Research* (TSER) Programme of FP4

**Context of the Research**

Research work on standardised and empirically based assessment of educational achievement in Europe has been limited compared to the USA. Yet, in most European countries educational assessment of student achievement is common practice. However, it is less than a decade ago that large-scale costly operations for getting benchmark data on educational progress could be justified.

In recent years many policy makers have been looking for statistical facts as a basis for sound communication between educational partners and for educational policy-making.

A “European Network for Education Research on Assessment Effectiveness and Innovation” (EU-AEI) was established in 1996 as a result of calls, like that of the European Roundtable of Industrialists, which in 1995 stated:

*“It has become a matter of urgency to set up a European Education Information and Monitoring System in order to record experience, evaluate results and improve the quality of education on a European level.”*

The EU-AEI network’s mission was:

1. To carry out international comparative research in education in the domain of achievement, assessment, effectiveness and innovation within Europe.
2. The collection and analysis of both outcome-oriented data at the level of individual students, and educational background conditions at the level of students, teachers, classroom arrangements, curricula, school management and organisation, and system parameters at the regional and national level (including specific educational policies).
3. To ask questions about the micro-, meso- and macro-level conditions that enhance educational performance and about the potential for educational change and innovation.

**Key Results**

The Network produced:

1. An Inventory of National Education Assessment Databases.
2. A conceptual framework with a basic categorisation for accessing the statistical overview, the assessment data sets and published results.
3. A web site containing 136 comparative statistics for the EU-countries, Japan and the USA, under the categories:
  - School characteristics (4).
  - Teacher characteristics (18).
  - Student characteristics (17).
  - Instructional processes (39).
  - Student attitudes (22).
  - Student achievement (36).

These statistics are available for primary and lower secondary schools.

**The full title of the project is:**

*European Network for Educational Research on Assessment, Effectiveness and Innovation.*

**The Final Report and results of this project are available:**

[Full Final report](#), [Abstract](#), [Summary Partner details](#)

The project's site is at: <http://www.edte.utwente.nl/prj/euai/index.htm>

[Back to table of contents](#)

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Economic Research* (TSER) Programme  
of FP4

**Context of the Research**

The expansion of higher education has produced an increase in the number of graduates entering the workplace. The world of work that these graduates enter is undergoing rapid change. New technological demands are common and new types of job roles continue to emerge. There is a growing focus on the role played by social competencies (affective and motivational) as opposed to knowledge. Increased Europeanization and internationalisation also affect the nature of work in many cases.

This project analyses the employment and work of graduates from institutions of higher education in eleven European countries (Austria, Finland, France, Germany, Italy, the Netherlands, Spain, Sweden, United Kingdom, Norway and Czech Republic) and also Japan. Nine country studies were sponsored by the EU-TSER programme, whilst the Czech Republic, Sweden and Japan conducted so-called "parallel" studies with their own research funds.

It explored European and international dimensions of graduate employment and work, identified early career progress, and attempted to identify the impact of higher education on graduate employment and career success. The project also paid special attention to graduates not finding suitable employment, as traditionally conceived, or facing unemployment. Though graduates tend to fare better on the labour market than non-graduates the project dealt also with aspects of a growing frequency of social disadvantage and exclusion.

The project collected data from more than 40,000 graduates who graduated in 1994/95 and were interviewed four years after graduation, on their graduates' socio-biographic background, study paths, transition from higher education to employment, early career, links between study and employment, their job satisfaction and their retrospective view on higher education.

This study provides the most thorough comparative information on graduate employment and the links between higher education and graduate employment and work to date.

**Key Conclusions**

1. Graduates from institutions of higher education in most Western European countries faced relatively positive employment and job prospects at the time of the survey in the second half of 1999.
2. Some employers and politicians appear to consider that the expansion of higher education results in "over-education". However, there is concern that they fail to recognise that qualification requirements rise as the knowledge society develops.
3. The graduates' average search period for the first regular employment lasts only about 6 months. The average unemployment ratio is 4% - four years after graduation, and even most graduates from fields notoriously for employment market problems find their way towards satisfactory employment and work a few years after graduation.

4. Approximately 20% of graduates employed four years after graduation state that they make little professional use of the knowledge acquired in the course of study and that their work and employment situation is worse than expected.
5. Only 12% considered their occupational situation inappropriate with respect to the level of their educational attainment and were dissatisfied with their job.
6. Only 7% believe that higher education is superfluous for their kind of work and employment situation. Only 4% would not study if they could choose again.
7. There is a wide variation between European countries as far as higher education and its relationship to the world of work is concerned. This is due to a diverse range of factors such as the length of higher education programmes, vocational versus academic provision, institutional reputation, and the extent to which independent learning is encouraged.
8. Views varied widely between countries about the need for close links between field of the study and related occupations, and about the characteristics of a good graduate job.
9. This disparity has resulted in for example:
  - Graduates, in some countries, having to spend three times as long searching for a job compared other countries.
  - Only 1 or 2% of graduates in most countries being unemployed for long periods during the first years after graduation. But this was 7-9% in three countries and as high as 18% in one country.
  - On average there is a 60% variation in gross annual income of full-time employed graduates between the countries.
10. There are also regional differences within countries. This is greatest in the poorer countries of Western Europe than in the richer ones, thus amplifying the disparities that exist between countries.
11. The relationship between higher education and employment and the type of higher education provided varies in most respects more substantially by country than by field of study. There are more frequent “national“ cultures than “disciplinary“ cultures in the relationships between higher education and the world of work.
12. A realistic view on the common elements and differences among Western European countries was provided by the inclusion of the Czech Republic and Japan in the project. For example, Japan shows that the smooth process of study and transition to employment results in a lesser chance of students acquiring broad experiences beyond the core domains of higher education. They are thus being equipped with a smaller range of professionally relevant competencies upon graduation.
13. In general, most graduates appreciate their study and believe that learning in higher education is useful for coping with the job tasks they undertake.
14. However, they also criticise many aspects of higher education – certainly to a varying degree across countries and fields. Many graduates expressed the view that higher education should prepare students better to be in a position to apply knowledge to the work environment and to the job tasks they are confronted with.
15. In the majority of European countries, students spend a substantial part of their study acquiring experiences and competencies in environments other than the classroom. Many students consider this more valuable than “efficient“ study in terms of a short and smooth “pass-through“.
16. The values of students and graduates are so different and the experiences in the world of work are so numerous that any claim for a single dominant culture of higher education seems to be irrational.

## **Key Recommendations**

The following key recommendations were made:

1. A regular system of surveying graduate employment and work is needed. This should be 4 years after graduation, involve 3,000 graduates per country and be conducted every 3-5 years.
2. A European-wide conference on higher education and graduate employment in Europe should take place in order to stimulate a Europe-wide dialogue on the policy implications.

**The Final Report and results of this project are available:**

[Final report](#), [Partner details](#), [Project Website](#)

[Back to table of contents](#)

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This thematic network has been funded by DG-Research under the *Targeted Socio-Economic Research* (TSER) Programme of FP4

**Context of the Research**

Throughout the European Union, literacy is seen as a pressing concern. Success and failure in literacy teaching carry implications for the economic and social well being of the Union. The most important phase of literacy learning is arguably that which takes place during, or even before the first years of formal schooling.

Based upon existing research primarily in England, Italy, Spain and Greece a thematic network was established to create a 'Shared Knowledge Base' on innovative developments in early literacy teaching and learning. Particular emphasis was placed on the development of literacy for children from marginalized groups. It aimed to develop innovative teaching practices to increase literacy levels for children aged 4-6 years old.

**Key Conclusions**

Two particularly important conclusions were reached:

1. At a time when a number of the EU's member states are moving towards highly centralised control of the curriculum, there is a need to take a contextualised view of the pedagogy of literacy teaching, whilst striving towards an agreed view of the goals of literacy education, and of the dynamics that shape its processes.
2. Substantial innovation requires much more than administrative action or political pronouncement. For teachers to develop a well-founded pedagogy that answers to the demands of their particular situations, a profound change of attitude is required, in relation to children, each other, researchers and ideas of what constitutes an active, productive literacy.

The different contexts in which the participants from the four countries work has shown that each country places differing emphases on language development and points of entry to the written word.

3. In England, in the context of a highly complex orthographic system, there has been a polarised debate between those who place the major emphasis on helping children towards mastering the code at an early age and those who give greater emphasis to the construction of meaning. Currently attempts are being made to reconcile these two views. Formal schooling can start at 4 years old.
4. In Spain and Italy the spelling systems are more straightforward, yet Spanish teaching traditionally focuses on learning the code in the early years of formal schooling. However, the educational reforms of 1990 in Spain have introduced a 'socio-cognitive' approach with an emphasis on the construction of meaning. In Italy innovatory approaches have principally been limited to pre-school settings. The age for starting formal schooling in Italy and Spain is 6 years old.
5. In Greece the traditional focus is again placed on the learning of the orthographic code in preparation for formal schooling. However, teachers are currently being encouraged to take a more interpretive approach to the curriculum and more careful account of children's responses to literacy activities. The age for starting formal schooling in Greece is 6 years old.

6. Social, political and educational differences have affected the teaching of early literacy in a dramatic way. England's national anxiety about the standard of literacy has led to increasing pressure on teachers, with the demands of the curriculum effectively allowing less time to work with individuals, and less time to develop particular areas of interest. However in Greece and Italy there is less public anxiety and less expectation for children to read and write at an early age.

Other conclusions reached:

7. There are a wide variety of written texts available to all young children, including those from marginalized groups.
8. Many parents are keen to collaborate with schools to help with their children's literacy development, but feel they are not confident about their own abilities. Teachers have developed productive relationships with parents in order to symbiotically promote an introduction to written language.
9. Young children are interested in understanding the meaning of the text and in writing their own texts. They are especially interested in texts that they can relate to and they are keen to explore both the meaning of the text and its relationship to spoken language.
10. Children benefit from learning about the orthographic code with meaningful text that they are able to form ideas about. The opportunity to speculate in a group about the meaning of the text has promoted a greater understanding of purpose of language.
11. Teachers can construct situations that promote positive attitudes towards literacy learning. Through observing, listening, validating and extending children's ideas about written language, they are able to provide positive feedback that promotes development and understanding. Group teaching and learning has been shown to increase motivation and enable individuals to progress beyond their independent capabilities.
12. Teachers can benefit from collaboration with each other, with children and with parents, they can also benefit from in-service support that offers them new concepts for teaching children literacy and written language, without infringing their autonomy.
13. There are beneficial effects of an action research approach, which encourages teachers to develop a cycle of observation, reflection, planning and action, in researching work in their own classrooms.
14. Modern teaching techniques need to evolve by supplementing traditional text with advertising, television, CD-Rom and multimedia.

## Key Recommendations

The study made the following recommendations relevant to a number of the European Union's member states:

1. When deciding on agreed goals for literacy education, it is vital to consider the various contextual differences between the countries, their language and their teaching practices.
2. A change in attitude is needed to implement real change and innovation, in relation to all involved.

## The Final Report and results of this project are available:

[Full report](#), [Abstract](#), [Summary](#), [Partner details](#)

## Key Publications

Dombey & Formisano, MP, "Autonomy in early literacy learning: different meanings in different national contexts", to appear in the *International Journal of Early Years Education*.

*Early Literacy in Context: Innovative approaches in four different European countries*, Video published by Università la Sapienza, Rome and the University of Brighton, UK.

[Back to table of contents](#)

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**Context of the Research**

Bringing the long-term unemployed back into employment through training is an ongoing policy of many governments. However, little is known on the effectiveness of labour market oriented training for the long-term unemployed.

Focusing primarily at the micro-economic level, this project has addressed the question of what works and what does not work in terms of the training the long-term unemployed. It has looked at the organisational, curricular and instructional characteristics of training programmes - that might make one type of training programme more effective compared to another training programme. Studies were conducted in Belgium, Denmark, England, Greece, Ireland, The Netherlands and Norway.

**Key Conclusions**

Some broad conclusions were drawn from the study:

1. Vocational education and training, and certainly (continuing) vocational training for either the unemployed or employed people, differs substantially between countries. Attempting to classify training activities and training measures in order to establish comparable data is a very difficult undertaking.
2. Some countries do have a clear record or register of what training is provided and by which organisations. Other countries do not know the total population of training schemes and initiatives or can only 'construct' a population overview with great difficulties.
3. The following results were gathered from former trainees from the training courses:
  - A large percentage of former trainees found a job - 44% claimed to have found their jobs during the course and 29% stayed on with the employer where they did their work experience. 71% said they had retained their original jobs, but out of those who had lost their jobs the majority (82%) had started looking for another job and 63% had succeeded.
  - However, less than half were convinced that the training was necessary to obtain their particular jobs and believed there was a mismatch between the training they received and the job they obtained.
  - The main reasons former trainees enrolled on the course were to increase chances in the labour market and because of the course content. The combination of theory and practise, job-related subjects, general subjects and practical training were considered as useful. Job search skills were considered to be less useful than the other aspects.
  - The trainees were on average relatively more highly educated than expected, the drop-out rates were low and the main reason for trainees leaving was because they had found jobs. This indicated there had been some form of selection process.
4. There were some surprising findings affecting drop-out rates:
  - The provision of guidance and counselling increases drop-out rates, however less guidance and counselling at both enrolment and transition stages also increased drop-out rates.

- Job search training throughout the course decreases the chances of finding a job, but at the end it improves chances.
  - The closer that practical training is to real work experience, the higher the chance that the trainee will not finish the course.
  - Greater flexibility of the curriculum increases drop-out rates.
  - Less selective training organisations have higher drop-out rates.
5. Psychological barriers, such as fear of failure, a negative self-image or fatalism, may also discourage further participation in training. These barriers may also lead to self-selection and bring about a situation where only the most motivated enrol for training. In contrast, good training can promote a growth in self-esteem and self-confidence.
  6. In the short term, direct employment could be considered as the best strategy of getting back into the labour process, as training can be a postponement of obtaining gainful employment or even a barrier.
  7. Some economic researchers believe that the level of training is too low, the scope is too narrow and too focused on getting people back into employment without taking into account the long-term employment perspectives of the training provided. Training is often too focused towards specific vacancies that exist within certain enterprises or that are expected to arise in the short-term.
  8. There are also concerns that the long-term unemployed (who have found work in favourable economic conditions) will be the first to be made redundant when economic growth declines or turns into a recession.
  9. There is a dilemma to be faced in designing labour market measures for the long-term unemployed. If labour market measures intend to promote the re-entry of long-term unemployed in gainful employment (with the prospect of employment in the long run and even the prospect of continuing training in the context of employment), the initial investment needed for training these unemployed should be substantial. At the same time the least qualified long-term unemployed are often confronted with multiple problems and do not (necessarily) give priority to training.
  10. It was found that the ‘retrospective’ research approach used in this study was not a very appropriate way of collecting reliable data for drawing conclusions. It was too costly to retrace former trainees long after they have left a training programme and resulted in the additional risk of producing skewed samples.

## **Key Recommendations**

The study made the following recommendations:

1. Improvements are required in identifying the various training initiatives for long-term unemployed in some European countries.
2. This will also require reaching a consensus in national definitions of unemployment particularly relating to being unemployed and taking a training course as a result of being unemployed.
3. There is a need for further and more effective research into vocational training and specifically ‘why’ one method is effective compared to another method. Therefore:
  - A more thorough classification of different training measures is required before selecting the cases/courses to be studied.
  - Longitudinal research over 4-5 years should be adopted in order to help draw conclusions of the possible effects of training in the longer run.
  - For the development and elaboration of joint comparative research in the field of (initial and continuing) vocational education and training and human resource development, a stronger focus on the specific problems and challenges encountered in performing such comparative research in these fields is necessary. International comparative research should go beyond such descriptive studies and rather try to provide social scientific explanations for phenomena in education and training and for differences between countries in these fields.
  - There is a need to examine what happens to the unemployed who do not gain access to the training that they applied for as well as those that were accepted on a training course.

- A greater understanding of the type of training that is needed to bring the least qualified up to the level of skills required for entry to the labour market.
  - Therefore, a basic understanding is needed of the size and structure of the group of least qualified with respect to the reasons why they have become unemployed e.g. due to major economic restructuring (decline in particular economic sectors) or due to obsolescence of skills or due to an overall lack of education and training (or insufficient quality of the education and training received). Such differentiations could be helpful, in setting out training strategies and designing particular training programmes.
  - Some ‘experimentation’ is required to find out which design is most suitable for a particular target group. The importance of the social aspect of training needs to be considered.
4. Research is also needed into the macro effects of training and whether investment in training from an economic point of view is a good investment.

**The full title of the project is:**

*The Effectiveness of Labour Market Oriented Training for the Long-Term Unemployed.*

**The Final Report and results of this project are available:**

[Full report](#), [Abstract](#), [Summary](#), [Partner details](#)

**Key Publications**

Bach Anders, K., *Real estate care taking. Case study report on a P47 course*, DEL, Copenhagen, 1997.

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[Back to table of contents](#)

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**Context of the Research**

The relentless fall in the demand for low-skilled labour is a matter of serious concern for European society. Since the beginning of the 1990's the gap between the earnings of high skilled and low skilled workers has widened and in many countries the unemployment rate for people without qualifications is four times higher than for university graduates.

This research focused on France, the Netherlands, Sweden, Portugal and the UK, and used additional information from other EU countries like Germany. It looked at the reasons for the changing situation of the low-skilled on the labour market. It also investigated the extent to which employers' demand for the low-skilled was falling and why, and explored the factors affecting the supply of skills, particularly low-skilled adults in the workforce. The research focused on the low-skilled individuals who have left full-time education after the completion of their period of compulsory education.

**Key Conclusions**

1. Despite a sharp decline in the supply of low-skilled individuals on the labour market, their labour market situation has deteriorated over the last decade, as the supply of low-skilled individuals continues to exceed demand at current labour costs.
2. Demand for those with low skills has declined as a result of technical change, which requires more advanced skill levels. Demand for those with low-skills will continue, but only in certain sectors of the economy. Demand will vary from country to country but largely as a function of relative labour costs.
3. The employment sectors in which the low-skilled groups are concentrated are either contracting or not expanding low-skilled employment relative to other skill groups.
4. In most European countries it will take at least a decade to reduce the low-skills group at current rates of progress.
5. Young people should be encouraged to aspire to achieving at least an ISCED 3 (upper secondary) level qualification as a minimum educational requirement for coping with the future demands of the workplace.
6. Employers claim that unskilled jobs now require better communication and social skills, and that many low-skilled individuals lack these skills.
7. A certificate to demonstrate personal qualities, skills and abilities could benefit those who have not achieved traditionally recognised qualifications.
8. Employers do get a high return on investment in work-based training, but incentives for the low-skilled group to participate in workplace training are insufficient. The project found that:
  - Poorly qualified individuals receive less training than the more highly qualified.
  - Older individuals receive less training than the young.
  - Low-skilled individuals are more reluctant to participate in employer-provided training than higher skilled individuals.
  - Innovative incentives and support are needed to encourage those already in the labour market to develop their skills to a minimum level, i.e. Individual Learning Accounts as in the UK.

9. Wage subsidies for older low-skilled workers who are soon to reach retirement age may be necessary to counteract labour market exclusion.
10. Current policy failures in education and training, were identified:
  - Schools in all European countries continue to produce some young people inadequately equipped or unprepared to take advantage of further education and training. In some European countries at least a third of young people are inadequately prepared.
  - Worryingly, a proportion of those have developed an aversion to further education and training because of their experiences at school.
  - Because of this, schools need to shift concentration from selection for higher education and focus on the achievement of a minimum level for all. This means maintaining high levels of self-esteem during compulsory education.
  - The adult education system fails because it replicates the school system. This has meant that relatively few mature adults have improved their qualifications.
  - Low demand for further training by the low-skills group needs to be addressed.

## Key Recommendations

The project recommends that a ‘minimum learning platform’ should be established, which would set an agreed level of knowledge, skills, and personal qualities that all individuals would be entitled to and expected to acquire.

Recommendations for establishing this platform include:

1. Each European country should produce its own policies for a ‘minimum learning platform’, which would address the specific country’s problems and challenges with their low-skilled group and their labour market.
2. However, a minimum platform should be informed by a set of values that individuals in all countries can share by virtue of their European citizenship i.e. respect for human rights, the rule of law and democratic decision making.
3. A new balance needs to be established in education between formalised knowledge and personal and social skills.
4. An emphasis on outcomes of the education process could ensure that more individuals attain the minimum threshold, although this could present problems with assessment by conventional means.
5. The workplace should play more of a role in delivering some of the elements of the minimum platform. This would require a new Social Partnership to develop and use the resources of the workplace for learning and individual development.
6. Funding for the distribution of educational resources will need rethinking, as costs for the minority of those who have difficulty with basic skills will be high.
7. It is advised that the current pattern of European entitlement to nine years of basic (compulsory) education should include an entitlement to achieve the “minimum learning platform”, although some might require additional years of education to achieve this level.
8. A learning entitlement (e.g. Individual Learning Accounts as in UK) for all citizens will be necessary to ensure access to education at any age and in any situation (i.e. shopping centres).
9. The minimum learning platform has to be open to all, not selectively based on performance. Entitlements and rights should be balanced by duties of citizens to take full advantage of entitlements provided.
10. The platform should not be fixed as requirements will change over time and skills that are not essential to today’s labour market may be indispensable in the future.

**The full title of the project is:** *Education and Training - New Job Skill Needs and the Low-Skilled.*

**The Final Report and results of this project are available:**

[Full report](#), [Summary](#), [Abstract](#), [Partner details](#)

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[Back to table of contents](#)

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**Context of the Research**

In the rapidly changing conditions of a “globalising” labour market, changes will be needed in the way professional intervention enhances social and economic participation for unemployed young people. This is particularly so in an era of the widening of employment choices and empowerment opportunities for unemployed 18-25 year olds.

Through research conducted in six European countries, - Portugal, Germany, Denmark, England, Holland and Flanders/Belgium - the limitations and opportunities resulting from EU policies in education, training and guidance programmes have been explored.

**Key Conclusions**

Conclusions based on new attitudes:

1. Defined as “working identities” - young adults have a variety of diverse and individualized views and attitudes when it comes to work. These can be loosely identified as:
    - Traditional wage earner identity - see a long-term job as a way of gaining money and self-respect.
    - Eroding wage earner identity - want a long-term job but have a low endurance and rarely stay in work, education etc. for a significant length of time.
    - Abrupt and disorientated wage earner identity - confused about the purpose of work and unsure about what they want from it.
    - New labour identity urged by desire and self-fulfilment - consider job fulfilment is more important than the wage.
- These identities often clash with those held by professionals, projects and the labour market.
2. Therefore, young adults need greater choices when meeting with projects, professionals and the labour market, in order to shape “working identities” that can match current developments on the labour market.
  3. Professionals also need to pay attention to these different “working identities” and plan trajectories and training in co-operation with each individual’s working identities.
  4. In addition, young adults need the capacity to weigh up the risks and uncertainties of different jobs, and need to be valued as equal and competent decision-makers, who have a right to control their own career.
  5. Disadvantaged low qualified young adults also need help facing existing barriers, like:
    - Bottle-neck policies.
    - Labour market traps.
    - Growing demands for flexibility.
    - A small amount of boring and badly paid jobs.

6. Two big groups need extra focus and support:
  - Young people in need of basic support (e.g. emotional binding, orientation, rules, continuity) would benefit greatly from long-term projects, individual counselling and finance. It is likely such projects would pay off financially and biographically in the long run.
  - Young people experiencing societal discrimination because of race and/or gender need projects that concentrate on sexual or racial discrimination.
7. For all groups, professionals have to establish an emotional binding with the young adults to ensure the young adults stay in projects and remain interested in learning. This can be done by:
  - Understanding, respect, recognition and acceptance.
  - Challenging but not infantilising.
  - Acknowledging different life experiences.

Problems with professional intervention:

1. Current professional intervention focuses on “adapting” low qualified young adults to the needs and demands of the labour market, which excludes any participation from unemployed youths and can reinforce their disadvantaged position.
2. Performance indicators and target pressures also force professionals to stick to traditional methods of education, training and guidance. This removes the possibility of working intuitively.

## **Key Recommendations**

The following recommendations were made:

1. Policy should concentrate on diverse learning programmes.
2. Policy is also needed that supports alternative initiatives to gain contact with the most marginalized group of “hard-to-help” young adults.
3. Professionals need to work with young adults to help individuals understand and critically reflect on their own situation and connect it in a meaningful way to the reality of the labour market:
  - Professionals should present themselves as co-producers of this meaning with the learner.
  - Both professionals and learners should interpret and negotiate possibilities and limitations directly relating to each individual including social and labour market changes.
4. Young people and professionals together should continually interpret and reinterpret the possibilities and limitations of the young person’s biography and the reality of the labour market.
5. Professionals should also be paid accordingly and resources for further training and supervision are required.
6. Policy must offer some freedom for education, training and guidance professionals to explore the possibilities and difficulties of working in an interpretive way and promote an exchange of know-how and experience between professionals on both organisational and inter-organisational levels. This know-how should also be made explicit and refined, and translated into flexible ‘guidelines’ that are continuously reviewed.
7. Policy should also create the possibility for practitioners to constantly gain insights into general changes in the “working identities” of young adults today. A theoretical knowledge of such changes is crucial to the future integration of young adults at risk.
8. Concerted efforts should be made to provide flexible environments that allow approaches to be adapted to individual clients; these include flexible procedures and instruments.
9. Policy needs to provide opportunities, resources and support for practitioners in different contexts to work more interpretively.

10. Educational settings need to:
  - Connect learning activities with the demands and possibilities of real labour and socio-cultural practises.
  - Be part of a broader social network that can integrate learning with experiences in work placements and social involvement.
  - Provide learners with chances to negotiate, discuss and reflect on their learning activities with their coaches and teachers.
  - Take into account the rapid changes in the labour market and the required qualifications.
11. Policy needs to take into account both the needs and demands of the labour market, and the needs and competencies of unemployed young people.
12. Policy makers need to balance between social and economic concerns that are assessed through indicators that clearly express the social output of economical policies.
13. Education, training and guidance initiatives should empower young adults to use their own initiatives to find their own options.
14. Exploration into the factors that keep someone alienated and excluded is needed. Starting with the assumption that people are not lacking abilities but choose how and where they use their abilities.
15. Similar problems and processes that lead to exclusion were found amongst the regions, but standardized or short-term solutions should be avoided.

**The full title of the project is:**

*Enhancing the Participation of Young Adults in Economic and Social Processes: balancing instrumental, social and biographical competencies in post-school education and training.*

**The Final Report and results of this project are available:**

[Full report](#), [Abstract](#), [Summary](#), [Partner details](#), [Comparative paper on convergence and divergence](#), [Joint paper on mainstream practices](#)

[Back to table of contents](#)

## Early Learning: the impact of environmental factors

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### Context of the Research

There is a widely held belief that early experiences have an important effect on developmental outcomes during pre-school and primary school phases. In order to gain a better understanding of how different factors affect children's development, research has been conducted into the organised programmes for the care and education of young children prior to the time they are enrolled in the primary school system in Austria, Germany, Portugal and Spain. These various programmes and activities have been collectively called the "Early Childhood Programme" (ECP).

This project consisted of two studies. The first study focused on 4 year olds in their pre-school and their home environment and aimed to get a better understanding of the nature and quality of care and how it affects the children's developmental outcomes. A second study, excluding the Portuguese children, looked at the same children as 8 year olds, when they had moved up to primary school.

### Key Conclusions

The following observations and conclusions are based on a number of factors that can affect child development at pre-school and on entry to primary school:

1. *Pre-school care* - The average age for children enrolled on out-of-home care is 3 years old. Austrian children start about half a year later. The amount of time spent in pre-school out-of-home care is 3 years, 7 months (Germany), 3 years, 1 month (Austria), 2 years, 5 months (Spain).
2. *Adjusting to primary school* - Children's adjustment to primary school in the first year is considered "quite positive" by most of the mothers. But German students were considered to be the least well adjusted by their mothers, they also score lower in school achievements.
3. Teacher/Parent relationships at primary school:
  - Teachers from all countries offer an average of 1-2 parent meetings in one half-school year, which are attended by 74% - 85% of parents. More teacher consultation hours are offered to Spanish parents.
  - Teachers estimate that homework takes 3 hours a week (Spain) and 2.5 hours a week (Austria & Germany). However parents estimate that their children take 30% longer (Germany) to 90% longer (Spain).
  - There is a direct relationship between positive parent/teacher relationships and better adjustment to primary school. All of the mothers considered their relationship with the teacher as "rather good". Austrian mothers gave the highest ratings.
4. Pre-school teachers:
  - Teachers see their role as more influential in child development than mothers do, they are slightly less direct and academic in their child-rearing attitudes, and tend to emphasise the personal development of the child as the task of an early childhood programme.
  - The levels of teachers' interaction tone (measuring the sensitivity, acceptance and involvement of the teacher) were considered high in all countries.

- Overall there seems to be a generally accepted standard of appropriate, humane and educational interaction with the children.
5. *Primary teachers:*
- Teachers spend 4-6 days a year on in-service training and are “quite satisfied” with their jobs.
  - A quarter of Spanish teachers are male compared to 1 in 12 in Germany and Austria.
  - Spanish teachers give language, mathematics, and science 4 hours a week. Austrian and German teachers give more emphasis on language (6-7) and mathematics (4-5) than on science (3).
6. *Pre-school classrooms:*
- At least two-thirds of classrooms in each country are mediocre or of inadequate quality.
  - In Germany and Austria more time is allocated to free play, compared to Portugal and Spain where there is a higher orientation of planned and structured activities.
  - 20% of children’s classroom time is spent in co-operative play. In contrast, 50% is spent doing the same task as another child without interacting co-operatively about the task with other children.
7. *Primary classrooms:*
- Class sizes are about 22 to 24 students and whole group instruction is prevalent, with only a tenth to a seventh of instruction time spent in small group work. One in seven students in Austria and Germany are of foreign origin with one in four having language difficulties. Spain only has about 1% of foreign students.
  - In Spain early childhood programmes (ECP) and primary schools are under the same administration. In Germany and Austria they are independent bodies. This can affect the continuing good or bad quality of the two phases.
  - Classroom quality can be characterised by a higher number of instruction hours per week, more homework, higher diversity of materials as well as a higher degree of teacher’s classroom management, more emphasis on the relevance of content and more emphasis on sociability and co-operation among children.
8. *Home life of pre-school children:*
- On average, the children live with two adults, have parents of a similar age and have employed fathers (90-96%). They have one sibling and their own room. They also have opportunities to interact with other children in their neighbourhood.
  - German and Austrian families have a more general education and a higher household income than Spanish or Portuguese families. 90% of Portuguese and Spanish mothers are married. In contrast, 83% of German mothers and 73% of Austrian mothers are married.
  - Three quarters of Portuguese mothers participate in the labour force compared to one third of Spanish mothers, and half of German and Austrian mothers. However, Austrian mothers are absent from home on average per week for 24 hours, 32 hours for German and Spanish mothers and 44 hours for Portuguese mothers.
  - Austrian and German families scored higher on an “activity scale” which measured participation in activities such as making puzzles, listening to stories, talking games, competitive games etc. Whereas, German families scored highest for general stimulation in the family.
  - Early childhood programmes have a considerable impact on family life including the amount of maternal care, labour force participation, relationships among family members and the social network of children and parents.
  - Mother’s educational level, favourable spatial situations, fewer siblings, a higher degree of stimulating interaction, diversity of activities and earlier developmental expectations directly affect the quality in the family setting during the pre-school phase.
9. *Home life of primary school children:*
- The majority of parents in all countries are made up of a mother and father. The highest instance is found in Spain. It is common that both parents work away from home (on average 50 hours for fathers and 27-36 hours for mothers). One half of mothers in Spain work, compared to two thirds of mothers in Germany and Austria.
  - 5 hours are spent at school and 45 minutes (Austria & Germany) to 70 minutes (Spain) on homework. Including homework children spend on average up to 50% of their waking time on school and school-related issues.
  - An own room for children, earlier developmental expectations for mothers, more stimulating processes and activities in the family affect educational quality in the family setting during the primary school phase.

10. *Educational expectations of pre-school children:*

- Mothers and teachers have similar expectations about the age children should master developmental skills, such as language, autonomy, motor skills and social development. Expectations about the sequence in which this development takes place were also reasonably similar.
- Mothers and teachers perceive individual differences in children as a combination of heredity and education but see parents as a stronger influence on children's development.

11. *Educational expectations of primary school children:*

- Mothers and teachers give top priority to goals relating to children's personality and sociability, followed by achievement-related goals, with aesthetic goals being given the least importance.
- Mothers and teachers rate tasks designed to encourage co-operation among students as more important than the "three R's".
- Mothers see competent, well-trained teachers and good classmates and friends as the most important characteristics of a good school.
- Austrian and German mothers place more importance on learning that involves parents and teachers (e.g. assign homework) and on informal methods (e.g. excursions). Spanish mothers prefer teachers to take sole responsibility for learning and favour more formal methods (e.g. visiting museums).

## **Key Recommendations**

The study made the following recommendations:

1. Policy makers should recognise that school success is highly dependent on high quality practises in both the Early Childhood Programmes and the primary school education systems.
  - These practises can be flexible if they provide relevant education of a consistently high quality.
  - The approach of non-selective and inclusive education should be developed and extended.
  - Emphasis needs to be placed on the inclusion of the 10-15% of children who struggle with transition into primary schooling.
  - The goal of education reform should be to reduce these problems with transition, which can lead to serious problems. This needs to be implemented by a combination of in-school measures and better parent-school co-operation.
2. Early Childhood Programmes are an important support system for children's development in the pre-school phase and school success in primary schools:
  - They have an important educational function and should be viewed as important components in building more successful national educational systems.
  - This requires a solid financial basis and well-trained professionals operating within an appropriate efficient and support framework, to utilise the educational potential of Early Childhood Programmes.
3. Students need opportunity, time and a variety of materials that allow different ways of learning:
  - A sufficient amount of instruction hours needs to be insured in the first grades of primary schooling.
  - A sufficient number and variety of materials need to be available to the students and teachers.
  - Teachers should be made more aware of the benefits of good classroom management.
  - Students need sufficient time for contextualised learning, with the chance to both apply and transfer their learning.
  - Close co-operation between parents and teachers needs to be regarded as an important element of successful primary schooling.
4. Strengthening the educational resources available to all families is a very important task:
  - The development of education-related conditions and resources in families should be the primary goal of family-support measures.
  - Support for families should be initiated before a child's birth and should be a process that accompanies the growth of a child, at least until the child has made the transition into primary schooling. This should ensure that a close relationship between families and their primary schools is established.

- Parent-education does exist and could be extended to establish a system of accompanying parent education. Incentives should be considered to encourage parent's co-operation in such programmes.
5. Future research into the educational quality experienced by children in their various settings needs to continue to provide better information for policy makers, administrators and practitioners to make crucial improvements.

**The full title of the project is:** *European Child Care and Education Study*.

**The Final Report and results of this project are available:** [Full report](#), [Partner details](#)

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[Back to table of contents](#)

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**Context of the Research**

Recent decades have witnessed rapid educational expansion and labour market changes across European countries. Such changes have had the greatest impact on those entering the labour market for the first time. As a result, the period of transition from school to work has become more prolonged and less predictable. It is therefore crucial that policy-makers understand the way in which education, training and labour market systems interact to shape the transition process in modern Europe.

This research has aimed to develop a more comprehensive conceptual framework of school to work transitions in different national contexts and to apply this framework to the empirical analysis of transition processes across European countries. The research utilised two complementary data sources for these analyses: the European Community Labour Force Survey and integrated databases based on national school leavers' surveys in France, Ireland, the Netherlands, Scotland and Sweden.

**Key Conclusions**

The following conclusions were reached:

1. Transition processes and outcomes were found to vary significantly across European countries. Three broad types of national system were identified:
  - Countries with extensive vocational training systems at upper secondary level, linked to occupational labour markets (such as Germany and the Netherlands).
  - Countries with more general educational systems with weaker institutional linkages to the labour market (such as Ireland).
  - Southern European countries with less vocational specialisation and lower overall attainment than the other groups.
2. Each of these three systems has distinctive patterns of labour market integration among young people. In 'vocational' systems, young people tend to make a smoother transition into the labour market while those in Southern European countries find it more difficult to achieve a stable employment position.
3. Across European countries, educational level is highly predictive of transition outcomes; those with lower levels of education have higher unemployment risks and greater chances of entering low-skilled, lower status and/or temporary jobs.
4. Those who have taken part in vocational education/training (especially apprenticeships) tend to have a smoother transition in their first job and achieve more stable employment.
5. Other dimensions of education are also significant with examination grades having a greater effect in more general education systems.
6. Transition outcomes are found to vary by gender, social class background and national origin. There is no evidence that such differences have become less important in shaping the transition process over time.
7. Early educational failure has serious negative consequences for young people across all systems.

## Key Recommendations

The project made the following recommendations relevant across the European Union:

1. Given the diversity in education, training and labour market systems across Europe, the same policy interventions are unlikely to be equally effective in different contexts. However, early educational failure has serious negative consequences for young people across all systems. There is a need, therefore, for policy intervention to reduce such failure and/or to provide alternative routes to skill acquisitions for young people.
2. There is also a need to monitor differences among groups of young people in terms of gender, social class and ethnicity and pursue policies to address these inequalities.
3. The project highlighted a number of areas which should be prioritised in future research:
  - The role of field of education/training in transitions.
  - Employer recruitment strategies in relation to young people.
  - Young people's own views of the transition process.
  - The role of policy interventions (especially youth programmes).
  - Regional/local differences in educational and transitional outcomes.
4. An overall recommendation is that a European-wide longitudinal survey should be initiated, covering young people from around the age of fifteen and following them over a ten-year period.
5. Alternatively, a mechanism should be put in place to encourage agreement on a 'best practice' template to facilitate the partial harmonisation of existing transition surveys.
6. In addition, the use of, and access to, the transitions module of the Labour Force Survey should be enhanced.

**The full title of the project is:** *A Comparative Analysis of Transitions from Education to Work in Europe.*

**The Final Report and results of this project are available:**

[Full report](#), [Abstract](#), [Summary](#), [Partner details](#), [Website](#)

## Key Publications

Biggart & Raffé, *Educational backgrounds and transition outcomes in four European countries: A comparison of school leavers' destinations in France, Ireland, the Netherlands and Scotland*, pp.113-131 in T. Hammer (ed.) *Transitions and Mobility in the Labour Market: Proceedings: Workshop, September 2-5 1999, Oslo, European Network on Transitions in Youth*, NOVA, Oslo, 2000.

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[Back to table of contents](#)

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**Context of the Research**

Although, the phenomenon of immigration is not a recent development, its complexity does not appear to be yet fully understood. This is tending to result in policy that is reduced to addressing “emergency issues” such as gaining entry, finding a job and crime.

This is even more noticeable with regard to minors of immigrant origin i.e. those with immigrant parents and/or grandparents. The national policies designed to integrate immigrant minors and minors of ethnic origin into their host society have not been very successful, leaving minors at risk of social exclusion.

This project has analysed national definitions, indicators, and evaluation systems, both in conceptual and in statistical terms. It also analysed specific policy responses in each of the countries that have been examined (Italy, Greece, United Kingdom, France, Sweden, Belgium and Israel), especially in education and training. The project has reviewed classification and definition systems for the well-being of children and has developed a new definition of well-being for children of immigrant origin according to a hierarchy of basic indicators that could be used for evaluating the condition of children and targeting specific policy.

**Key Conclusions**

The following conclusions were reached:

1. Current classifications for immigrant minors and minors of immigrant origin are insufficient and vary from country to country. This promotes confusion and makes any harmonisation of policies at a European level objectively complicated.
2. A pilot media analysis in Italy found that immigrants are most commonly represented in the media in terms of security, or at any rate in conjunction with crime-related issues, even in the case of minors. The effects of this “media image” are detrimental to the policies aimed at the integration of immigrants and encourage feelings of social exclusion in immigrant minors trying to find their place in the host society.
3. The well-being of immigrant minors is the main object of social policies yet the current focus is on basic needs. It was found that additional factors like growth and development, participation in society and the formulation of a complete functional identity are fundamental for minors’ well-being. Therefore the indicators of well-being have been redefined as:
  - *Material well-being* - standards and density of housing, poverty rate and family employment all affect well-being of minors.
  - *Health* - immigrant minors still have higher mortality rates and lower birth rates. They are also at risk to certain types of mortality.
  - *Delinquency* - crimes committed by immigrant minors and minors of immigrant origin should be distinguished between the demonstrative crimes (that reflect social unease and “rage” against exclusion) and the instrumental crimes (committed for material gain, which possibly reflect economic difficulties).

- *Community Participation* - immigrant children need to feel that they can be members of their host country with equal rights and without the risk of expulsion in adulthood. Their involvement in youth activities and sport, neighbourhood or community activities should also be measured as pro-social participation.
- *Education* - the school system is failing immigrant minors and minors of immigrant origin in a variety of areas:
  - i. *Enrolment* - minors are assessed in the host countries language, not their mother tongue. This can lead to children being placed in classes below their age group, which dramatically hinders their development.
  - ii. *Choice of schools* – they have a tendency to choose vocational or technical schools, over high schools. This has resulted in a very high concentration of immigrant minors and minors of immigrant origin in certain schools, which are often in underprivileged neighbourhoods and have bad reputations.
  - iii. *Drop out and expulsion rates* – they have higher rates than native students.
  - iv. *Discrimination* - immigrant minors struggle with the language demanded by the school, and minors of immigrant origin have difficulties in the acquisition of cultural skills that are demanded by the school.
  - v. *Results* - they have lower results than the native population. This difference increases as students advance through the years.
  - vi. *Careers Advise* – they have limited job prospects their background affects their choice of a course of study (i.e. Belgian advisory services encourage immigrant minors towards technical and vocational sectors regardless of their results). Immigrant families also translate their perception of the prospects for integration as adults, on to their children, which directly influences minors’ attitudes to their life and career prospects.
  - vii. *Higher Education* - significantly less choose higher education than the native population.

## **Key Recommendations**

Some of the following proposals rely on common definitions and regulations being established between countries:

### **European Policy Recommendations**

1. Establish a European Intergovernmental Commission to unify the criteria used to define minors of immigrant origin, at a European level.
2. Common objectives need to be established for the well-being of minors, relating to school, the community, family, security and participation. These should be used to monitor native and immigrant minors’ well-being, and social and cultural risk factors based on the United Nations international convention on the rights of minors.
3. A common approach to immigration needs to be established between countries and the requirements for citizenship need to be clearly identifiable for minors and their families to allow them to invest in the host society
4. The criteria adopted for collecting statistics on minors (with immigrant backgrounds) needs to be harmonised.
5. A process needs to be adopted to monitor the minors that arrive in the host counties and for the granting of citizenship to minors.
6. Language skills and the performance of school pupils in different countries (with emphasis on the mother tongue) also need to be monitored.
7. A common definition of the target of reference for cultural and educational policies directed towards the younger generation, should include immigrant minors and minors with immigrant parents and/or grand parents.

## National Policy Recommendations

1. Revision of school textbooks and curricula to introduce elements that are intercultural (inclusive of cultures) and reflect multicultural society.
2. Creation of training and refresher schemes for teachers.
3. After defining the professional qualifications and skills that will be required, cultural mediators should be employed in schools, health care and public administrations.
4. Translate and diffuse the manual for school operators drawn up as part of this project by CBAI (Centre Bruxellois d'Action Interculturelle).
5. Promotion of periodic campaigns to inform immigrants of rights and duties, and criteria and principles relating to the well-being of minors. Exchange programmes between students of different countries could encourage mutual respect for different cultures.
6. Support for the production of fiction, radio and TV programmes that are oriented towards promoting attitudes of reciprocity, particularly with regards to minors.
7. Organisation of training and refresher seminars for advertising and media operators, in order to provide greater understanding of the issue.
8. Revision of self-regulatory codes of conduct adopted by the media with explicit reference to respect for ethnic minorities and the way minors are depicted in the mass media.
9. Promotion of projects that highlight plays, books and films, which focus on the patrimony of various cultures and promote the use of the museum system for intercultural purposes.
10. A study into the illnesses that affect immigrant minors, particularly those connected with poverty (i.e. respiratory infections) and the treatment of immigrant minors and minors of immigrant origin with psychiatric disorders compared to the native population, attention must be placed on hospitalised minors.

## The Final Report and results of this project are available:

[Full report](#), [Abstract](#), [Summary](#), [Partner details](#)

## Key Publications

*Il Ctp e l'educazione degli immigrati*, Centri Territoriali Permanenti e Formazione degli adulti, tra realtà e prospettive conference, (Marina di Sibari), 13 June 2000.

Cover story on the demographic issues raised by CHIP and articles (pp. 82-86), including special attention to CHIP and an interview with Carla Collicelli (p. 86), *l'Espresso*, 27 December 1999.

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*Current Research into Education for Immigrants in Italy*, 4th International Metropolis Conference, (Washington), 9 Dec. 1999.

*Educazione interculturale in Europa con elementi per un rapporto sulla scuola italiana*, presented at Seminario interno alla Commissione Nazionale Intercultura, Ministero della Pubblica Istruzione, (Rome), 14 November 2000.

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*L'immigrazione familiare e l'evoluzione interculturale*, Centro Italiano Femminile: Cronache e Opinioni, (Rome), 1999.

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*Politiche nazionali di accoglienza in Italia e in altri paesi del Mediterraneo*, presented at the Seminar, *Accogliere/accogliersi: esperienza a confronto in un'ottica formativa*, Movimento di Cooperazione Educativa, (Orvieto), 30 June 1999.

[Back to table of contents](#)

## Schooling, Training and Transitions: an economic perspective

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Economic Research* (TSER) Programme  
of FP4

### Context of the Research

Improved schooling and training has long been considered as a way of improving the work force and strengthening the labour market. This project has brought together the work and experience of European economists who have contributed to the field of education and training. It has enabled comparative analysis and a deeper understanding of the mechanisms that have shaped schooling and training systems and labour market transitions, somewhat differently across countries.

Four phases of transition were identified school-to-school, school-to-work, work-to-work and work-to-inactivity. Transitions describe the adjustments that occur as a result of economic growth, structural change and policy interventions. This project examined schooling, training, and transitions at various points of an individual's life cycle.

### Key Conclusions

These key conclusions, based on research from 57 working papers from various countries covered:

- A comparative analysis of schooling systems.
- The transition from school to work.
- Training and labour market flexibilities.

The economic comparative analysis of schooling systems concluded:

1. Generally, all schooling systems are subject to market forces i.e. as the school population increases more resources are put into the system.
2. When considering allocation of resources the following conclusions were reached:
  - The way in which resources are allocated within schools is as important as differences in resourcing levels across schools or school districts.
  - A low pupil-teacher ratio significantly increases the unit cost of education, as does early streaming and decentralisation.
  - Since a higher pupil-teacher ratio compensates for the increased cost of streaming, differentiated education systems allow more crowded classrooms in order to maintain the unit cost of education at the same level as that in non-differentiated systems.
  - Higher resources in the form of early streaming or a lower pupil-teacher ratio do raise the unit costs of education but also seem to increase the academic attainment of pupils.
3. There was some evidence to suggest that since ability can be detected earlier than talents, it is not optimal to make an intensive use of differentiation by cognitive ability too early at the lower secondary level.
4. There seems to be a trade-off between differentiation in schools and selection at university entry level. The use of selection at university is reduced essentially by the amount of differentiation at the upper secondary level, the quality of secondary education, and the typical duration of study in universities.

5. Vocational training is more efficient when firms are involved in its organisation, which is ultimately correlated with longer tenure and lower labour turnover in the economy.

The transition from school to work research concluded:

1. Being trained in a firm as an apprentice is more efficient in helping young people to be employed than training provided in school only. However, in France only, it was found that ex-apprentices seem to have lower wages than vocational school leavers.
2. With the exception of Spain, a young person take less time to get a job the higher their level of schooling. However, in Norway females have shorter search periods and longer job durations than males. But, as is more common, they also have lower wages.
3. There appears to be no evidence that the widespread increase in youth education is resulting in over-education and increased job competition.
4. Least-educated young workers experience the greatest difficulties in finding a job mainly because of their own lack of appropriate schooling to fulfil (possibly new) job requirements rather than competition with better-educated youths for unchanging low skilled jobs.

Conclusions concerning training and labour market flexibilities:

1. Informal training ('learning by doing') has no impact at all upon wages and promotions, compared to formal training which does positively influence both.
2. For the UK, the long term effects of government training policies can be beneficial, particularly in relation to employment enhancement of women and for people taking training that has some element of compulsion and has highly structured content.
3. Young people are not unemployed because they have unrealistic expectations of the wages they are worth in the labour market. The length of their unemployment duration is more likely to be dependent on the available supply of jobs and training places.
4. Turnover in the labour market may allow better quality job matches to be achieved.
5. Better-educated people seem to obtain more training, and, in general, obtain better jobs. Their re-employment probabilities are greater than are those for workers with lower levels of education, and they are more likely to obtain permanent jobs. Thus, the training and education of workers should yield appreciable dividends.
6. Job destruction rates are not noticeably different by workers skill level, whereas job creation rates are higher for better-educated workers. Therefore, measures to dissuade "firing" will not necessarily benefit lower-educated workers any more than they benefit other workers.
7. When studying turnover in the labour market, job satisfaction should not just be considered in terms of pay and hours of work, as it seems to depend strongly on what the person does, with whom the person does it, and what the person expected.
8. There is no significant overall difference between the job performance of older and younger workers.
9. The low labour force participation of older workers will become a cause of growing concern.

## Key Recommendations

The following recommendations were made:

1. Market forces must essentially drive educational efforts and resources, as businesses are able to define the kind of training they require and evaluate skill-specific talents.
2. Education policies need to take into account the rate of technological change and the structure of international trade, as both will have an impact on the future skill requirements of the labour market.
3. Policy to aid lower-educated workers must concentrate on increasing skill levels or alternatively developing new policies that increase the demand for lower-skilled workers i.e. wage subsidies.
4. For workers who have difficulty in finding and keeping suitable long-term jobs, measures are needed that address:
  - Low productivity.
  - The content of the jobs found by this group.
  - Their ability to use their initiatives.
  - The establishment of good relations with co-workers and managers.
5. Measures are needed that encourage better quality job matches, which target a wide variety of aspects of the job and do not just aim to raise workers' productivity.
6. Additionally, a complete analysis of minimum wages is needed that includes:
  - Transitions into employment.
  - The effect of firm hiring policies.
  - The effects on skill formation.
  - The long-term labour market successes of young workers.
7. To target the decreasing labour force participation of older workers, schooling and training policies are needed to discourage early retirement.

## The Final Report and results of this project are available:

[Full report](#), [Summary Partner details](#), [Working Papers](#), [Website](#)

## Key Publications

Abe, Cridelauze & Sofer, *Youth Unemployment, Specific Human Capital and Minimum Wage: a Comparison between France and Japan*, Journal of the Japanese and International Economies.

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[Back to table of contents](#)

## Developing Learning Organisation Models in SME Clusters

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### Context of the Research

Although European small and medium enterprises (SMEs) account for 71% of European employment, individually, they are often unable to formulate detailed training strategies that will enable their employees to be better qualified to cope with increased competition.

However, co-operation between organisations within markets has long been identified as a factor in economic success and networking between organisations can contribute to stability and reduce uncertainty. These networks can evolve over time as ‘natural’ clustering’s of enterprises, or can be ‘induced’ artificially as a result of interventions like the development of business or science parks.

This project has looked at the role of SME clusters in organisational learning in the context of their training needs. It has looked at how learning needs are identified, how learning is organised, how know-how is acquired and redistributed. It has studied over 300 existing SMEs and their clusters in Italy, Spain, France, Austria, the UK and the Netherlands.

### Key Conclusions

The following observations were made:

1. Three main levels of organisational learning were identified which encapsulate varying combinations of formal and informal learning activities:
  - Information gathering – The lower data monitoring, acquisition and management intended to ensure that an enterprise remains aware of changes and developments in the markets in which they operate.
  - Knowledge acquisition – A process whereby enterprises define, acquire the skills, know -how and strategic intelligence necessary to carry out day-to-day activities.
  - Competence consolidation and development – A process whereby existing information and knowledge is converted into learning (through, for example, identifying skills deficits, acquiring new knowledge through training and collaboration).
2. Based on the inter-relationship of these levels of “organisational learning” five main types of SME characteristics were identified:
  - “Crisis Driven”- describes a high proportion of very small enterprises and new start-ups that respond to challenges and opportunities, their decision-making strategies are shaped by a dominant personality and do not have industrial relationships.
  - “Endogenous” - are generally larger enterprises. Their focus for learning is on knowledge acquisition processes and behaviours derived from in-house practises. This knowledge is acquired through mentoring, on-the-job training and “head hunting”. They are also disengaged from industrial relationships.

- “Exogenous” - are outward looking. They develop their skills base through external sources of expertise i.e. training courses. Their strategic management practices focus on systematic competence development of a continuing training basis using specialised training providers. They opportunistically use local networks.
- “Embedded - Information Centred” – are highly embedded within local industrial relationships; use community bases networking for intelligence gathering, knowledge acquisition and consolidation and enhancement of skills; have limited organisational learning, which utilises community, informal and family networks.
- “Embedded - Competence Centred” are similar to “Information Centred” except they use formalised practises and processes for competence development and their strategic practises are largely confined to informal information gathering.

3. This has resulted in five main “cluster” types being identified:

- Porterian - situated in a clearly defined historical and cultural industrial relationship with collaborative networking between SMEs in similar markets. Governance structures are flexible.
- Segmented Porterian - similar to above but interactions between SMEs are shaped by differentiation in producer-supplier relations and different market positions and niches. Networking is by loose associations with a central figure, association or service base and the governance structure is more formal.
- Interlocking - work to forge links of common interest within the local economy. Networking is diverse and ranges from loose interest groups formed for promotional purposes to professional associations with a common project.
- Induced Partnership - is formulated by external agencies (non-community based), which co-ordinate organisational learning within the cluster. Development agencies provide communications and decision-making structures which central services can support.
- Virtual Cluster – is a national network of family enterprises bound by common history and objectives, with entrepreneurial decision-makers playing the dominant role. Alternatively, it can have a common activity base linked through an information and communication technology infrastructure.

This resulted in:

4. A “Cluster Appraisal Toolkit” being developed which enables an audit to be conducted to assess the relative balance between information gathering, knowledge acquisition and competence development and any major skills and competence gaps.

Based on the individual SME and SME clusters studied the following conclusions were reached:

5. There is no clear association between collaborative learning and cluster ‘success’, in terms of various factors including economic performance.
6. There is little evidence of clusters of SMEs systematically engaging in high-level collective strategic learning behaviours.
7. The existence of a territorially, culturally or institutionally bounded cluster does not imply that constituent SMEs within that cluster engage in ‘organisational learning’ or that the cluster is an aggregated ‘learning organisation’.
8. There is no one ‘cluster’ model, clusters have either evolved through time or have been induced by institutional intervention.

## Key Recommendations

The following recommendations focus on developing guidelines and practical tools to promote organisational learning in SMEs and SME clusters:

1. SMEs need carefully targeted “formal” and “informal” training and support networking strategies in the context of the various types of learning behaviours they exhibit and in line with the three main constituent components of ‘organisational learning’ - information gathering, knowledge acquisition, competence consolidation and development.
2. There is a need to raise awareness amongst SMEs of the need to balance these three different components of ‘organisational learning’ in their human resource development planning and management.
3. As a large proportion of SMEs are in ‘crisis management’ rather than pro-active learning situations they need to be encouraged to adopt a more participative style of collective learning. Support services need to be provided and resources pooled.
4. The lack of competencies in marketing and multi-job skills in small enterprises needs to be addressed.
5. The lack of expertise in skills auditing amongst SMEs, their support organisations and regional development agencies needs to be addressed by developing a ‘skills evaluation culture’.
6. A European Skills Accreditation System should be established to homogenise the features and needs of SMEs.
7. Local clusters should be encouraged to act as the “hub” of the European Accreditation System.
8. SMEs should be encouraged to promote the value of capturing on the job experience; to promote competence standards for their local cluster and contribute towards the accreditation of informal competence development.

**The Final Report and results of this project are available:**

[Full report](#), [Abstract](#), [Summary](#), [Partner details](#)

[Back to table of contents](#)

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**Context of the Research**

In recent years Lifelong Learning has become a fundamental goal of education policies, both at a national and international level. It is often advocated as a way to achieve socio-economic development and as a tool to promote the ‘information’ and ‘knowledge based’ society.

Although often cited in policy statements Lifelong Learning is a rather nebulous and multifaceted concept, where hardly any detailed research has been conducted, especially concerning the involvement of the universities in its provision. This project has started addressing this issue by studying understanding of the concept and how it is implemented in the universities in seven European countries (France, Germany, Greece, Spain, Sweden, UK and Norway). The study sampled four universities in each of the countries.

**Key Conclusions**

These following conclusions were drawn:

1. As no universal definition of Lifelong Learning exists the following was adopted and proposed: - “Those novel forms of teaching and learning that equip students (learners, individuals) to encounter with competence and confidence, the full range of working, learning and life experiences”.
2. Lifelong Learning addresses three fundamental objectives of education:
  - Personal development
  - Social cohesion
  - Economic growth

These objectives are not necessarily reconcilable.
3. The term “Lifelong Learning” is often used as a synonym with adult education, permanent education and/or continuing education. In France, Germany and Spain, for instance, “permanent” or “continuing education” is used instead of Lifelong Learning. In some cases, Lifelong Learning is seen primarily as entailing distinct forms of provision for distinct groups of people. In others, it is more integrated in the totality of higher education.
4. There is a common historical pattern of provision in most countries from adult education to continuing education to Lifelong Learning. Generally, universities seem open and well disposed to Lifelong Learning but its provision on a very wide scale would entail a revolution in university education. The signs of such revolution do not appear anywhere in sight.
5. The take-up of Lifelong Learning policies in universities varies between countries. This is partly due to differing constitutional, policy-making and administrative traditions, and how far higher education has been incorporated into an institutional and legal framework.
6. Responsiveness to European Union policies varies between countries and depends on the extent to which national educational systems have a linear managerial relationship with universities.
7. Relationships and partnerships with economic or public service organisations already exist in most universities. These relationships improve links between university and business, and can generate funds to support training places.

8. Lifelong Learning is still seen as a marginal activity in many universities but there is an awareness for the need of its development amongst academic staff and there are embryonic or developed structures for its provision.
9. To encourage the development of Lifelong Learning, some universities have created central co-ordinating offices and vice-rector roles that include Lifelong Learning amongst their responsibilities.
10. Most Lifelong Learning is directed at employment, career opportunities and continuing professional education for both employed and unemployed. This includes updating or re-training to acquire or extend knowledge and skills or qualifications for new roles.
11. The focal point of Lifelong Learning teaching is on the learner rather than the institution and aims to help students take more responsibility for their learning. This shift from teaching to learning and from supply to demand-led provision is widely accepted in all the countries studied, but in practise most academics still control and determine the programmes and the curricula.
12. Distance learning is well established through Open Universities in the UK, Spain, France, Germany and in Greece but students can struggle with the amount of self-learning, and technology required for these courses. It can be economically viable but requires very large student groups.
13. Access is fundamental to Lifelong Learning; this includes flexible funding for courses, variable and flexible entry requirements, acceptance of life experience as a qualification, wider social inclusion and hours to suit students who are employed or unemployed.

## **Key Recommendations**

The following recommendations are directed at various levels:

**At national level:**

1. The multiple objectives (economic, social, political, cultural, individual) and definitions of Lifelong Learning policies should be recognised and a debate on their social and educational implications and the prioritisation of costs and benefits should be encouraged.
2. Lifelong Learning “packages” must be flexible and not inhibited by existing systems, structures and regulations. Reviews are also necessary to ensure that regulations, systems and structures provide adequate incentives and guidance for the further development of Lifelong Learning.
3. Central authorities need to clarify policies and funding allocations for Lifelong learning. Minimum criteria and training needs for a commonly recognised accreditation system should also be established, along with common admissions criteria and regulations to guarantee quality. In addition, trends and Lifelong Learning interests in the socio-economic environment need identifying, and legislation for the regulation of Lifelong Learning teaching time also needs clarification.
4. Additional resources are required for Lifelong Learning but there is a need for clarification as to whether these will come from the state, employers or the students.
5. Fee income, though unlikely to solve funding problems, must be optimised without sacrificing other Lifelong Learning objectives.
6. Regulations are needed to ensure that relationships between universities and economic or public service organisations are beneficial to all involved.
7. Entry requirements and assessment procedures must be reviewed to suit the educational characteristics of different groups of students.
8. Clearer distinctions between the Lifelong Learning functions of higher education and the functions of further education are necessary to dispel uncertainty about the extent to which university specialist resources are used in the provision of training.
9. Teachers should be provided with training facilities that encourage new thinking about the curriculum. The costs and education benefits of information technology also need to be evaluated.

#### At institutional level:

1. Lifelong Learning policies need to be defined within mission statements and university plans. Adequate university roles and structures (e.g. Vice-rector and inter-faculty committees) must be created to ensure these policies are implemented. When appointing staff to these roles faculty skills in Lifelong Learning should be identified.
2. Training priorities for each professional field must be identified and a framework created to apply structure and context to training activities.
3. Reward systems for those developing and operating Lifelong Learning practises need reviewing to ensure continuous developments in this field.
4. The range of courses must be adapted to suit the needs of external users of the university and company-training contracts need to be won.

#### At university departmental level:

1. The mutual benefits between Lifelong Learning and conventional university programmes need further consideration.
2. A more calculative approach to time allocation between standard teaching, research, general administration and Lifelong Learning should be adopted.

#### At all levels:

1. Further research is needed into a variety of areas, including legal and regulative frameworks, the curriculum, access, resources, budgets, cost, student support, partnerships and quality assurance.

#### **The Final Report and results of this project are available:**

[Full final report](#), [Abstract](#), [Summary](#), [Partner details](#)

#### **Key Publications**

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Mora and Vidal, *Lifelong Learning in Spanish Universities: the market inside the public system*, European Journal of Education. Vol. 35, no.3, pp. 317-327, Sept. 2000.

[Back to table of contents](#)

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**Context of the Research**

Demographic change will continue to drastically alter the structure of the workforce in coming decades across Europe. This will lead to a diminishing supply of labour, which could have an impact on productivity and competitiveness. A greater understanding is needed of how the labour market and the working lives of people will need to adapt to an “ageing workforce” that also has to cope with technological changes and an increasingly global economy.

During the 1990s the trend was for older workers to be excluded from the labour market. Increasingly there will be a need to reverse this trend in order to cope with these demographic changes. Education and training systems are going to need to adjust to these changes in order to ensure that all workers including older workers have the necessary competences to meet these new demands, perhaps, on their longer working lives - thus the growing importance of lifelong learning.

Lifelong learning in general, and demand for continuous development of skills, knowledge and attitudes needed in working life in particular, have resulted in a call for new ways to organise learning, in and outside the workplace. Parallel to that, there is a need to monitor, recognise and more effectively to put into action the existing knowledge in companies, and include all stakeholders in these processes. Furthermore, these development have challenged on one hand to re-evaluate the concept of job-related competence and ‘competent’ workers, and on the other the traditionally stereotypes-coloured attitudes toward learning and development, particularly in later phases of the life-span.

This project studied 27 small and medium enterprises (SMEs) in England, Finland and Norway. It looked at the learning of older (45+) workers and addressed the maintenance, development and utilisation of their job-related competences - knowledge, skills, learning, values, and attitudes. In particular the project focused on the individual and organisational effects, needs and opportunities emanating from the ageing of populations and changes in working life.

**Key Conclusions**

The following conclusions were reached:

1. **Older workers are competent workers.** Job competence is often qualitatively different between older and younger workers, due to the differences in their work histories and experiences and educational background, but not their age. Both groups manifest strengths and weaknesses in competence in comparison to each other.
  - The job competence of older workers was generally highly valued by managers and employees in SMEs.
  - Age as such was not a contributing factor to any competence deficiencies.
  - Although systematic monitoring or documenting of older workers’ competence did not exist, experienced workers were acknowledged and often had a “mentoring” role in the SMEs.

- Work experience and personal characteristics were valued as more important contributors to job-competence than formal training.
  - Social and occupational competence, as well as work morale were considered to improve with age.
2. **Learning at work among older and younger workers alike is challenged by the changes in working life and workplace.** Continuous changes both stimulate learning and reduce opportunities for it. Age as such has little to do with effectiveness of learning at work. How learning from and at work is organized – also acknowledged, supported and rewarded - in the workplace is crucial to learning at work to flourish as individual and collective activity.
- Changes in working life and workplaces do challenge the learning of older workers but workload and time pressures reduced their opportunities for learning. In some cases older workers adopted an adjusting rather than participating strategy amidst these changes.
  - The assessment of learning attitudes, skills, or motivation, showed no relationship to age except in regard to memory and speed.
  - Learning at work varied more across different work types and often within age groups (among younger *or* among older workers) across work types than age.
  - New technology was the biggest learning challenge to all employees. Some older workers managed well, whilst with others it resulted in their departure. Practice-based learning was preferred, though in some cases the need for more general theoretical issues was brought up.
  - Learning in the workplace was highly social and a collegially shared activity but rarely systematically focused upon or organised.
3. **A fuller utilization of the job competence of older, highly experienced workers in the collective scenery of the workplace can enhance productivity and facilitate cooperative learning.** However, its full recognition, putting into action and development poses as much of a challenge to management as many other areas of modern knowledge management.
- Older workers do participate in informal and non-formal training but compared to younger workers are less inclined to participate in formal training.
  - Competence development of younger workers was more visible and systematic (e.g. mentoring), whereas older workers were viewed more as contributors and ‘teachers’ as opposed to being in need of learning and development, with the exception of information technology.
4. **Development of learning organization requires capability, motivation and opportunities to reflect upon one’s own and company’s practices with management setting the bottom line.**
- Awareness of SMEs as learning organisations and what that might mean in one’s own company was relatively low among both management and employees. However, it was observed that a transition process may be taking place as an SME moves from a traditional, stable organisation towards a more dynamic, responsive learning organisation.
  - The effects of our efforts to develop SMEs towards learning organizations by externally initiated, reflexive learning interventions were strongly dependent on management’s involvement in and commitment to such a reflection.
5. **Flexibility and productivity of the older workforce, as well as social cohesion are not given in any particular context.** Rather they are produced and reproduced in and through policies we create and our everyday practices in working life. Strong will and concerted effort to develop these qualities are crucial, among management as well as among employees.
- Successful work-based learning and training interventions involving older workers have the potential to improve motivation for learning, self-confidence, organisational commitment, and the social climate in groups with mixed ages.

## Key Recommendations

### *Specific recommendations for European and national policy:*

1. There is a need to raise awareness of the value of older workers in working life by highlighting the strengths in older workers' job competences. The national programmes and campaigns implemented in some European countries have provided excellent results and hence examples of good practice.
2. Educational initiatives should be developed that create and strengthen learning opportunities and support both older workers and genuine lifelong learning. European and national educational policies for lifelong learning must support provision for the upgrading of basic skills.
3. Continuing efforts are needed to reverse the lowering of retirement age and to improve the labour market position of older workers through initiatives such as "age-management" in companies.
4. More vigorous effort and more positive attitudes are needed towards the training of older workers.
5. The benefits of "inter-generational communication" and co-operation towards increasing productivity should be highlighted and incorporated into national policies. However, there is a need to be aware that this increases the risk and the expenditure for small business. National policies should aim to lower this expenditure or extend the horizons for return.
6. Greater attention must be paid to synergies between personal interests in work, leisure and training when developing policies to support flexible arrangements between work and retirement. For example, the personal interests of employees in late career could be used as a point for personal development and for updating work skills.

### *Specific recommendations for companies:*

1. Initiatives are needed to develop sensitivity and accreditation of workforce diversity in management policies and practise.
2. Management should develop an improved awareness of and clarity over the learning-working relationship in their companies and through open discussions work towards clearly articulated, inclusive, longer term learning and development policies, necessary also in small companies.
  - a) Inclusive developments are needed to ensure that older workers are given the chance to participate in organisational restructuring. The designing of work organisations and training systems should be sensitive to workforce diversity.
  - b) New and flexible ways of organising working involving learning are needed to best utilise the competences of highly experienced workers.
  - c) Management needs to respond to new forms of learning and utilise the diversity of their personnel, in order for SMEs to develop into learning organisations, especially in occupations and companies in traditional sectors.
3. More attention needs to be paid to the effects of training on workplace and actual job tasks, particularly among highly experienced employees. Participation in training should always be coupled with conscious concern for individual and collective competence development and advancement.
4. Human resource development policies and practices should be sensitive to and reflect the diversity of the workforce.
  - a) Increased awareness is needed of differences in learning styles and strategies.
  - b) Older workers with low or obsolete experience in participation in learning activities need support and encouragement to update their skills and personal development.
  - c) Inclusive support is vital for senior employees when learning new technologies, through methods and practises that will include and empower the current negative self-image of older workers and older learners.
  - d) Incentive systems are needed to motivate older workers into training and support learning and competence development.

- e) Older workers must be encouraged to design their own personal careers through the combination of flexible practise and social/employment security.
5. A concerted effort is required to enhance knowledge and skills exchange and acknowledge “inter-generational communication” and cooperation.
6. Additional research is needed to improve learning environments in SMEs, including the development of methods to integrate older workers in learning organisations; the mapping of diversity in competences and flexible organisations; the identification of both new career patterns in late professional life and the age differences in the mastery of information and communication technology; the development of learning and teaching methods suitable for low-educated and older workers with emphasis on learning style and age differences.

### Further information

Full title of the project: “Working Life Changes and Training of Older Workers” (WORKTOW), final report completed in November 2001.

Final report published in 2002 and available at VOX, Trondheim, Norway. Phone +47 – 73 99 08 40, Fax. +47 – 73 99 08 50, E-mail: [vox@vox.no](mailto:vox@vox.no).

### The Final Report and results of this project are available:

[Full final report](#), [Abstract](#), [Summary](#), [Partner details](#)

### Key Publications

Final report: Tikkanen, T., Lahn, L., Withnall, A. Ward, P & Lyng, K., *Working life changes and training of older workers*, Trondheim: VOX & European Commission, 2002.

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[Back to table of contents](#)

## Lifelong Learning: the role of human resource development within organisations

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### Context of the Research

Lifelong learning has become, and will remain, an important issue for Europe, as it develops into a “learning society”. Work organisations are becoming important partners in this learning society, as they provide ever more opportunities for continuous learning to their employees, in order to optimise organisational learning. Companies that explicitly encourage and support worker learning, from a strategic perspective, are called ‘learning organisations’.

The new focus on employee learning changes the role of the Human Resource Development (HRD) function. The role of HRD within ‘learning organisations’ is becoming clearer, but many uncertainties remain for HRD professionals, especially with regard to the question of how to bring their new roles into practice. There are only a few instruments to help HRD officers in this regard. Yet, many interesting initiatives are being undertaken by HRD practitioners throughout Europe to support strategic learning processes of the organisation as a whole.

This project has examined these HRD initiatives with the objective of firstly clarifying the specific European outlook on the role that HRD, (in learning oriented organisations) can fulfil in lifelong learning, thus contributing to the discussion on a ‘European model of lifelong learning’. Secondly the project aimed to contribute to the further professionalisation of HRD in Europe, by providing both conceptual perspectives and practical examples.

Case study descriptions were made from HRD functions within 30 large “learning oriented” organisations throughout Belgium, Finland, Germany, Italy, The Netherlands and the United Kingdom. Additionally, a survey was held under a larger group of 165 companies. Based on a literature review comparisons were made with Japanese and US organisations.

Key research questions, guiding data collection, were:

1. How do HRD departments in learning oriented organisations envision their own role in stimulating and supporting employee learning?
2. What strategies do they adopt to realise their envisioned role?
3. What factors inhibit the realisation of this new role? How do HRD practitioners cope with them?
4. What factors facilitate the realisation of HRD’s new role?

### Key Conclusions

1. The “learning organisation” is an important metaphor for HRD professionals to assist them in:
  - Developing collective intelligence within organisations and organisational forms supporting such a need thus eliminating the holding of knowledge in separate compartments at different levels.
  - Understanding the importance of knowledge and in particular tacit knowledge, which has to be recognised and valorised insofar as it is embedded in human resources.
  - Moving from training-based development policies towards new policies fostering learning in different ways (support for competencies development, learning networks, learning self-assessment in the communities of practice).

2. Learning oriented organisations do employ a rich bouquet of change initiatives, in which, no one type of change is particularly dominant.
3. The main motivator for wanting to become a learning organisation is the desire to become more client centred by continuous improvement and innovation. However, more people-oriented reasons such as improving the quality of working life seem to play a role as well.
4. The envisioned role of HRD professionals within learning organisations is to:
  - Support the business.
  - Support (informal) learning.
  - Support knowledge sharing (as a special form of supporting informal learning).
  - Develop and coordinate training.
  - Change HRD practices.
5. Although HRD professionals, consider that this is still their main responsibility, managers and employees are important active partners in supporting learning, and are expected to become more so in the future. Their role is predominantly one of identifying learning needs, stimulating and supporting informal learning, ensuring the continuous learning of themselves and others. HRD professionals will continue to provide support like organising training and supporting informal learning efforts.
6. However, it was found that HRD training-related strategies still fulfil a significant role, with instruments and initiatives to increase employee responsibility for learning, being of least importance.
7. Thus HRD practices to some extent appear to fall behind HRD visions and do not paint a picture of very innovative HRD practices, dominated by new methods such as knowledge management networks and a stimulating learning climate in the workplace. This may be partially because HRD objectives are not that wide-ranging.
8. No specific influencing factors were found to stop HRD professionals from changing their practices more significantly. Although some barriers to change were found:
  - Insufficient time for learning on the part of the employees.
  - Insufficient time for performing HRD tasks on the part of the managers.
  - Lack of clarity on the role of HRD.
9. The type of organisation does not influence the way in which the organisation envisage the role of HRD; the strategies they employ to implement HRD activities and the factors that facilitate the attainment of the envisioned role of HRD.
10. There is no one single European model for HRD, although there are subtle but meaningful differences as to the philosophies, strategies, and practices on HRD across the countries in the study.
11. Nor, is there any overriding 'Japanese' or 'US' HRD vision as the differences between the companies are huge.
12. Line-managers are increasingly taken a role in the development of human resources due to:
  - The convergence of management of organisational competences (aimed at internal effectiveness and competitive advantages on the market), and the management of individual/communities competencies (based on explicit and tacit knowledge).
  - New ways of organising firms.

## Key Recommendations

The following recommendations were made:

1. Managers fulfil a key role in changing HRD practices but it was found that it is sometimes difficult to get them to fulfil this active role, either because of their workload, lack of affinity with HRD tasks or a lack of skills in this field.
2. Therefore in the short term, it is necessary to find strategies to involve managers in HRD, by changing their views on learning and increasing their motivation to support learning. In the long run, consideration should be given to incorporating HRD skills in all management training programmes.
3. HRD functions should be more precisely defined and recognised by top management as a major part of the global development strategy of the company and seen as an investment rather than a cost.
4. Professional associations from different European countries should organise events where HRD professionals can reach a common terminology, exchange ideas and collectively try to solve difficult challenges.
5. There is a need to change the view that learning is just a classroom, teacher-based activity.
6. Companies should seek cooperation with (higher) institutions for vocational education and with universities in order to assist in the creation of an infrastructure for lifelong learning.
7. Administrations and governmental agencies should set the example in adopting a clear learning organisation approach and more sophisticated human resources development policies.
8. Since competence development is seen as a key element of implementing the concept of the learning organisation, further research is needed to develop valid and useful competence profiles; better understanding of the facilitating and inhibiting factors in competence assessment and development; and in coping strategies of organisations that try to overcome problems in implementing competence systems.

## The Final Report and results of this project are available:

[Full final report](#), [Abstract](#), [Partner details](#), [Website](#)

## Key Publications

Horst, ter, Mulder, Tjepkema, & Scheerens, *Future challenges for Human Resource Development professionals in Europe*. Part II: A literature review on differences in outlook between European, US and Japanese HRD departments, Enschede, University of Twente, 1999.

Horst, ter, Tjepkema, Mulder. & Scheerens, (eds.), *Glimpses of changing HRD practices in learning oriented organisations throughout Europe*: Practitioner's book, Enschede, University of Twente, 2000.

Tjepkema, Horst, ter, Mulder & Scheerens, (eds.), *Future challenges for Human Resource Development professionals in Europe*, Part I: Results of case studies in 28 companies on lifelong learning in learning oriented organisations, Enschede, University of Twente, 1999.

Tjepkema, Mulder, Horst, ter & Scheerens, (eds.) *Future challenges for Human Resource Development professionals in Europe*. Part IV: Results of a survey in learning oriented organisations in 7 countries in the European Union, Enschede, University of Twente, 2000.

Tjepkema, S., Stewart, J., Sambrook, S., Mulder, M., Horst, H. ter, and Scheerens, J. *HRD and learning organisations in Europe*, Routledge, London, 2002, ISBN 0-415-27788-4.

[Back to table of contents](#)

**Full title of the project:** *Further Training Funds as an Impulse for New Models of Lifelong Learning - Integrated Funding Concepts.*

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This thematic network has been funded  
by DG-Research under the *Targeted  
Socio-Economic Research* (TSER)  
Programme of FP4

**Context of the Research**

In the light of the constantly increasing unemployment rate in Europe and the high number of long-term unemployed, it is important to develop new concepts and ideas for addressing this issue. There is a need to re-orientate long-term employment and training policy towards the integration of lifelong learning with employment, regional, training and wage policies. This in turn will require a new financing concept for funding vocational qualifications at a national level.

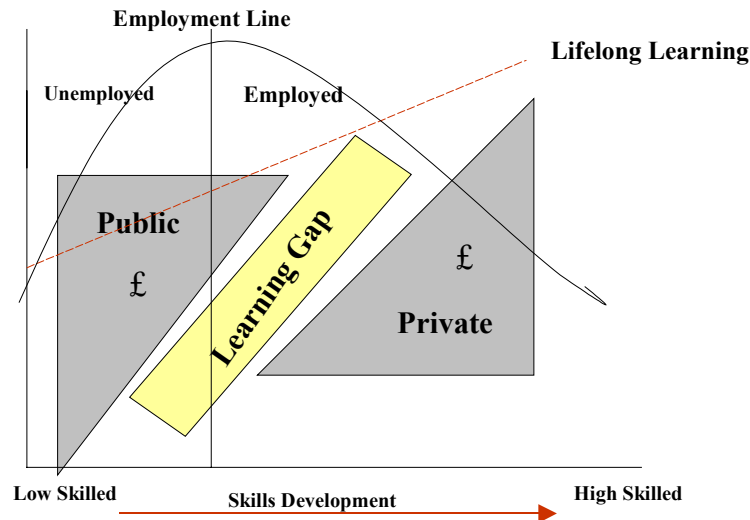
This project has developed a thematic network consisting of representatives from eight countries. (Austria, Belgium, Denmark, Germany, Norway, Portugal, The Netherlands, United Kingdom). It has aimed to identify ways of integrating existing patterns of funding with forms of lifelong learning in order to develop new concepts. This has involved a thorough stocktaking of the financing models and instruments for vocational training and further education in the various national contexts.

**Key Conclusions**

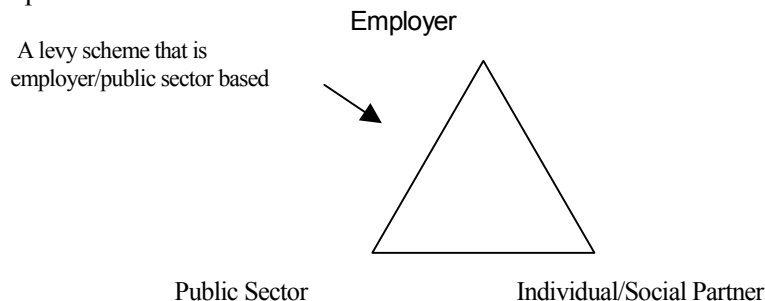
The following results and conclusions have emerged:

1. Governments of most developed economies have increased the level of investment in national education and training infrastructures. Therefore the overall level of educational attainment in these economies has also increased.
2. However, there are still concerns in these countries about the increasing prevalence of skills gaps and shortages as well as the adequacy of existing training provision to meeting employer demands. It has therefore become apparent that there is a difference in the skills obtained through educational attainment and those required to meet the demands of business.
3. A model for lifelong learning was developed (see below) that represents a number of the competing interests that have to be reconciled if a culture of lifelong learning is to be created and sustained within any economic system. These competing interests may be social, individual or economic. Based on this model the following conclusions were reached:
  - For lifelong learning to be a reality the two triangles need to be brought closer together so individuals can move seamlessly along the hypothetical lifelong learning line.
  - Thus interventions are needed along the “learning gap” in order to close it.
  - This requires investment from all parties, employers, individuals and government.
  - If the needs of the excluded are not incorporated and integrated with the needs of employers and the economy then there will continue to be a segmented learning market within which opportunities and rewards will not be available to all.

## A Model of Lifelong Learning



1. Countries which have funds created by the social partners (like Denmark and Norway) or where there are voluntary or obligatory employers' funds for vocational education (like The Netherlands) are much more creative or successful when it comes to the construction of 'models' for securing employment or of reintegrating the unemployed.
2. They are also more successful at overcoming regional or local quantitative or qualitative bottlenecks of staff shortages than countries where different groups of society only take on responsibility for those interests specific to themselves.
3. In order to compare the role of a levy in different systems a tool (see below) was developed to assess the relative contribution and involvement of each of the partners – the public sector, the private sector and individuals or social partners. Using this tool comparisons were made with a number of systems to be found in different European countries.



The triangle represents the tripartite relationship between the parties in the levy process. It is possible to use the tool qualitatively to assess the relative relationship between each party in the context of a particular levy. For example, if a levy scheme was run by the state with only employer input then the levy would be assigned a point some way along the employer/public sector axis as illustrated above.

This model can also be further applied to the different elements of levy schemes, for example to assess the relative contribution of partners to the financing of a levy, or then relative input to the application of the funds.

### Key Recommendations

1. The current vocational training system is in need of a basic - institutional, instrumental and financial - revision so as to be directed towards the future demands of a lifelong learning process.
2. There is a need to integrate competing interests (social, individual or economic) into a coherent system in order to ensure a continual process of lifelong learning.

The Final Report and results of this project are available: [Full final report](#), [Summary](#), [Partner details](#)

[Back to table of contents](#)

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This thematic network has been funded  
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Socio-Economic Research (TSER)*  
Programme of FP4

**Context of the Research**

Related to the concept of a knowledge based or learning society, education and training has gained increased importance in European policies in recent years. Vocational education and training (VET) in the European Union is influenced by the traditional values of European societies embodied in the diversity of traditions, institutions, legislation and cultures. This needs to be recognised and the values embraced when EU and national policy issues in vocational education and training are analysed.

The “Forum for European Research into Vocational Education and Training” was established as a network of research institutions to seek a new approach to transnational research in vocational education and training and to offer systematically rigorous definitions of different approaches to assist researchers in the pursuit of knowledge. The FORUM sought to develop a research methodology, which relies less on comparison and more on a collaborative approach to research.

Fourteen countries were represented in the Forum and its members included respected researchers both nationally and internationally.

The project partners were senior academics in institutions responsible for training VET professionals and had links with policy makers both at regional and national levels. In addition, FORUM was committed to integrating the coaching and development of young researchers into the work of the network. The involvement of young researchers in the network was designed to ensure that FORUM would make a lasting contribution to the research and development community, on a European scale, that out lives the timescale of the project.

**Purpose of the Research**

The main aim of the thematic network was the establishment of the European dimension - in terms of contents and methodologies - within the sphere of vocational education and training (VET). The European dimension needs to embrace the traditional values of European societies embodied in the diversity of traditions, institutions, legislation and cultures that influence vocational education and training in the European Union. Common economic pressures may result in divergent responses of various European VET systems to economic, political and social pressures. The project aimed to produce analysis with a high degree of relevance on important EU and national policy issues in the field of VET.

The network set out to analyse how VET systems across Europe are expanding to common pressures, enabling the development of European policy, as opposed to national policy scenarios.

The work content focused on the exploration of the European dimension for research into the capacity for change and adaptation of educational systems as a common thread.

It was recognised by members of FORUM that an interdisciplinary approach was vital for success in its work and this was reflected in the characteristics of the network and the tasks allocated to members.

FORUM work aimed to identify and examine national case studies of best practice, undertake literature reviews, prepare detailed research proposals and present findings to relevant conferences, symposia and journals. The major outcome was to make recommendations to policy makers, researchers and practitioners in the field of vocational education and training. The project established five Thematic Groups devoted to the following research and policy topics:

- Learning in organisations
- VET and the labour market
- Changing institutions
- Changing identities
- Culture, values and meanings

Summaries of these five topics with policy recommendations can be found in the final report of this thematic network and in the individual papers presented at the FORUM workshops.

## Recommendations

Some of the thematic groups were able to make recommendations:

1. Occupational identities are important but need re-building for the 21<sup>st</sup> Century. They are required to be dynamic, multi-dimensional and open with a high level of interactivity internally to the occupational holders and externally to those in workplace related occupations. They need to be broader in scope, and less narrowly defined by their past craft specialisation.
2. The ‘regulation’ of occupations that is common in many European countries, should be extended to include continuing professional development; including the whole lifelong learning process. Such regulation should seek to broaden the occupational identity into neighbouring occupations and deepen the occupational identity with differing levels of expertise.
3. There is a need to bring more closely together the actors involved in learning and employment in order that they develop a better understanding of their respective roles and the potential to influence the coordinating mechanisms within the broader inter-related eco-system of learning and employment. Account should be taken of the issues that are indirectly as well as directly affecting performance of the coordinating mechanisms.

**The full title of the project is:** *Forum of European Research in Vocational Education and Training.*

**The Final Report and results of this project are available:**

[Full report](#), [Abstract](#), [Summary](#), [Partner details](#), [Project Website](#)

Five additional [FORUM Papers](#) describing issues raised and results have also been produced (by an external, independent reviewer). Three papers cover “Learning in the Learning Organisation”, “Occupational and Social Identities” and “VET, Change and Employment”. Two other papers are based on follow up discussions with some of the project partners about the processes they deployed and the lessons they learned as network participants. These are on “The Achievement and Challenges of Collaborative European VET Research in the context of the European Research Area (ERA) Objectives” and “The Engagement and Development of Young Researchers in European Research Networks”.

[FORUM Paper 1](#): Learning in the Learning Organisation

**FORUM Paper 2**: Occupational and Social Identities and VET

**FORUM Paper 3**: VET, Change and Employment

**FORUM Paper 4**: The Achievement and Challenges of Collaborative European VET Research in the context of the European Research Area (ERA) Objectives

**FORUM Paper 5**: The Engagement and Development of Young Researchers in European Research Networks

[Back to table of contents](#)

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Manchester Metropolitan University, UK

Motorola, Glasgow, UK

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**Context of the Research**

Skill shortages and gaps in citizen's skills are considered to be constraining the drive towards European competitiveness and social cohesion. The European Union White Paper on Education and Training is aimed at addressing this issue. One of its objectives is to create a European Skills Accreditation System. This aims to set up permanent and accessible skill accreditation mechanisms that will allow individuals to validate their knowledge however it has been acquired, on the basis of standardised frameworks of competencies, using personal 'smart cards' (credit-card like skills cards).

This project addressed these issues by focusing on:

- Developing appropriate and effective taxonomies to define the domains of skilled performance.
- Identifying methods of auditing skills that can provide meaningful assessments of 'skills gaps' at the European level, as well as at the local level.
- Facilitating an understanding of what forms of training are appropriate in addressing skills gaps, particularly for excluded groups.
- Promoting an understanding of the ways in which skills can be represented, so that they are intelligible to both workers and employers.
- Exploring new institutional arrangements to promote collaboration between relevant actors (government, companies, trades unions etc.) on skills definition and accreditation.

**Key Conclusions**

The following conclusions were reached:

1. Levels of labour mobility within the European Union have historically been consistently low in general.
2. In-migration to the EU from 'external' countries has consistently run at a far higher level than inter-EU migration
3. Migration and labour mobility is inherently 'localised' in nature.
4. There is no evidence that these patterns will change dramatically over the foreseeable future and that the mass diffusion of smartcard technologies will precipitate dramatic changes to these patterns.
5. Employers are far more interested in how 'soft' skills and competences (such as 'personality', 'experience' and 'cross-job skills') are represented than in how formal qualifications are accredited and 'cross-walked' across different European occupational and skills classification systems.
6. Companies (particularly those involved in the rapidly-evolving 'knowledge industries') have a real need for skills that facilitate 'just-in-time' learning, the development and utilisation of 'organisational memory', and the incorporation of client feedback.

7. The relationship between skills and social exclusion is complex: training is but one element (albeit an important aspect) of this relationship, and there is a need for a more comprehensive (and more contextualised) set of tools to support skills development for socially excluded groups.
8. Developments in Internet-based technologies and interactive knowledge bases have significantly outstripped those in smart-card technologies, leaving the latter as a narrow, specialised technological metaphor.

## Key Results

As a consequence of the conclusions the project produced the following results:

1. A range of enabling technologies were utilised to promote the foundation of a “European Skills Development Network” based on the following five scenarios of use:
  - Support for Migrant Workers.
  - ‘New Jobs for Old’ - Tools for Inter-regional partnerships.
  - ‘New Opportunities for the Long Term Unemployed’ - Public Employment Service support tools.
  - ‘Human Resources Developer’ - Valorising the Company Asset Base.
  - ‘The Mobile Citizen’ - Cross Border Electronic Credentials Authentication tool.
2. These scenarios incorporate key target user groups in typical settings that exemplify problems of ‘skills gaps’ affecting labour mobility and economic competitiveness in the European Union.
3. Services known as the ‘COMPETE toolkit’ were developed and validated for the five “scenarios of use”. They consisted of:
  - Elicitation tools, to help users define their specific skills needs.
  - Diagnostic tools that make sense of the elicitation data (for example to conduct skills audits).
  - Representation tools to make the diagnostic outcomes meaningful (for example to produce a ‘skills profile’).
  - Decision analysis and support tools (for example to help users make a choice between job options).
  - A Data Warehouse, containing data on jobs, labour market information, on-line assessment systems and skills data.
  - User profiling and data mining tools, to match user needs to the information contained in the warehouse.
4. With the help of this toolkit, users will be able to:
  - Carry out a ‘skills audit’ for an individual, company or local area.
  - De-construct and re-construct the skills, competences and knowledge associated with a particular occupational profile with reference to a common European skills ‘content model’.
  - Obtain the latest information on evolving skills and skills gaps particularly in the new ‘knowledge industries’.
  - Check the authenticity, and ‘value’, - on-line - of their own or ‘third party’ qualifications, and references, obtained anywhere in the EU.
  - Obtain information on available jobs, available employees and training opportunities, customised to a particular ‘user profile’.
  - For companies, match available skills to new business opportunities and customer needs by virtue of ‘just in time’ skills assessments and ‘organisational memory’ tools.

## Key Recommendations

1. There is a need to establish a European Skills Development Network (E\*NET) in order to market the toolkit services towards the various scenarios of use.

## The Final Report and results of this project are available:

[Full final report](#), [Abstract](#), [Summary](#), [Partner details](#)

This project is now being taken forward under the EC 'e-TEN' Programme. The new project is called “COMPETENT” and will market validate the outputs of 'Competence Evaluation and Training for Europe' in three scenarios of use:

- large organisations
- a EURES cross-border network in Saarbruchen
- support for migrant workers in Athens.

## Key Publications

Cullen, J., *Smartcards and European labour migration*, paper at the EU Conference on education and the Mediterranean Countries, Marseilles, December 1998.

Cullen, J., *Collaborative Learning in small firms: why skills standards don't work*. Paper at the International Small Business Conference 98, November 1998.

Cullen, J., *Why Learning Technologies Don't Work*, paper at the EU Learning Telematics Conference, Munchen, Germany, June 1999.

Cullen, J., *Clusters and co-laboratories: the myth and reality of institutional learning*. Ind. & Higher Ed, December 2000.

Cullen J., *Understanding the Cultural Logic of EU Programmes*, paper at the Herrenalb US/EU conference on technology policy evaluation, November 2000.

Cullen, J., *Re-shaping Identity: The Wider Benefits of Learning*, paper at the Conference on Research and Policy on Lifelong Learning, London, November 2000.

Danau & Timmermans, article on the project in "NEWS" the newsletter of ECW, 1999.

Danau & Timmermans, article on employability & mobility within the frame of COMPETE and the ABN AMRO case in "NEWS", the newsletter of ECWS, July 2000.

Danau & Timmermans, article on COMPETE with the main conclusions and outcomes of the project in "NEWS", the newsletter of ECWS, December 2000.

Jones & Miller, Book chapter in *Welfare, Risk & Citizenship: a reader*, Routledge, September 2000.

Jones, Miller & Cullen, Paper, *COMPETE: European Movement Towards a Competency-Based Skills Taxonomy and a Personal Skills Medium*. Conference on Skills, Miami, February 2000.

Mandi, P. & Agrafiotis, D., *Announcement of the project to migration related organisations*, August – September 2000.

[Back to table of contents](#)

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Economic Research* (TSER) Programme  
of FP4

**Context of the Research**

Considerable attention is now being given to the importance of European small and medium enterprises (SMEs) to increase their competitiveness and contribute to the employment generation within an increasingly globalised context. However, this depends on their ability to combine flexible production with the continual innovation of products and production processes. In order to achieve this, enterprises must learn to compete in a fast changing environment.

This project has aimed to identify the learning processes that lead to increased competitiveness of SMEs, and has described how these learning processes are shaped in different European cultural contexts, by looking at 24 SMEs in four different European countries (Austria, Italy, Norway and Spain).

**Key Conclusions**

The following conclusions were reached:

1. SMEs find training courses too broad in scope, failing to meet their specialised needs. This issue is especially important for new employees with a need for specific technical knowledge/skills.
2. SMEs have low expertise in accessing training funds resulting in a lack of specialised training courses.
3. Universities and training centres do not always meet the training needs for new skills and knowledge derived from innovative processes.
4. Managers in some SMEs tend to work on many operational issues and do not plan their training needs.
5. Training serves not only to acquire new skills/knowledge, but also as a means of widening their network of market specialists.
6. There is an increasing need for multi-skilled employees.
7. Many SMEs appreciate language and basic software training (commodity training).
8. Projects involving customers, companies and universities foster innovation in SMEs.
9. Entrepreneurs with low technical skills use their network of colleagues and university faculty to evaluate company risk.
10. Some managers and entrepreneurs have stereotyped ideas about training courses. Lack of contextualization, cost and time lag before results appear contribute to this stereotyping.
11. The involvement of universities and research centres helps to create, store and disseminate knowledge, while SMEs bring flexibility, market orientation and creativity to foster innovation.
12. There is a risk that valuable, specialised knowledge will be lost if firms fail to get sufficient funding.

13. Some of the enterprises have had problems in accessing a skilled labour force.
14. Some SMEs are not aware of EU institution efforts to cut down red tape for improved interaction with local/regional/national/EU administrations.
15. Trust in markets facilitates the development of knowledge, the relationship among organisations and individuals and the creation of networks that facilitate knowledge storage.
16. SMEs acquire innovative ideas through trade fairs.
17. Financial assistance and consulting services provided by the public service are important, but SMEs still have difficulty utilising this knowledge to meet client and market needs.

## **Key Recommendations**

### **Focused towards training policies:**

1. More, experience-based and tailored to particular needs, courses are needed where workers from various SMEs have to cope with the same workplace tasks and problems they would encounter.
2. The involvement of employee's associations and chambers of commerce in such initiatives should be encouraged.
3. New training programmes between universities and SMEs should be promoted to create training programmes to foster specific competencies for innovation enhancement.
4. Programmes that combine multi-functional skills should be promoted for SMEs in innovative markets with new processes.
5. In SMEs with low training levels, there is a need to promote courses that maximise network opportunities. Also, promote "commodity training" since it increases the future employability of workers.

### **Focused towards educational policies**

1. There should be support for collaborative projects involving customers, SMEs and Universities in order to create "relational capital".
2. University-level exchange programmes between technical and business schools should focus on helping entrepreneurs in their start-up phase, in order, to increase likelihood of their business surviving and becoming successful.
3. Business schools and universities should mentor entrepreneurs, with an emphasis on personalised, practical education in the implementation of start-up business plans.

### **Focused towards SMEs policies**

1. Support the development of venture capital funding markets for high tech SMEs as a way to increase funding possibilities and also to foster knowledge creation.
2. Facilitate the relationship between SMEs and Public Agents through the clarification, simplification and publication of main policy guidelines and objectives, further promoting the use of IT tools for communication purposes with SMEs in Europe.
3. There should be the creation of the contextual conditions to ensure trust in market relationships to facilitate the development of knowledge, the relationship among organisations and individuals and the creation of networks with strong knowledge storage capabilities.
4. Promote the role of "pioneering clients" among public institutions to facilitate access to financial assistance and consulting services to SMEs.

**The full title of the project is:**

*Small Business Training and Competitiveness: building case studies in different European cultural contexts.*

**The Final Report and results of this project are available:**

[Full final report](#), [Abstract](#), [Summary](#), [Partner details](#), [Deliverable 1](#), [Deliverable 2](#), [Deliverable 3](#)

**Key Publications**

Barrull, X., *Training in SMEs*, EDAMBA summer school (Chateau de Bonas, France), July 2000.

Bonet, E., *Considerations on the Learner as a Non-Naïve Scientist: Understanding Rhetoric in the Learning Process within Organisations*, First Conference on HRD Research and Practice across Europe, Kingston University, (UK), 15 January 2000.

Bonet, E., *Corporate Learning and Rhetoric of Inquiry*, European Doctoral School on Knowledge and Management seminar, Escuela Superior de Dirección y Administración de Empresas, (Barcelona, Spain) 23-25 September 1999.

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[Back to table of contents](#)

## A Comprehensive Framework for Effective School Improvement

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Groningen Institute for Educational Research, NL

Institute of Education University of London, UK

University of Bath, UK

University of Athens, GR

Institute for Educational Research, NL

Service de Pedagogie Experimentale, IT

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### Context of the Research

Effective school improvement is high on the agenda of most countries' educational policies. However, theory and research associated with this have tended to come from the paradigms of "school effectiveness" and "school improvement" which have grown apart over the years in terms of their methodology and focus.

School effectiveness is strongly focusing on student outcomes and the characteristics of schools and classrooms that are associated with these outcomes without automatically looking at the processes that are needed to bring changes. School improvement is mainly concerned about changing the quality of teachers and schools without automatically looking at the consequences for student outcomes. In short, school effectiveness is trying to find out *what* is to be changed in schools in order to become more effective while school improvement is trying to find out *how* schools can change in order to improve.

This project has aimed to create stronger links between these two ways of thinking by the creation of a "comprehensive framework" for effective school improvement that helps to explain why improvement efforts succeed or fail and which factors promote or hinder effective school improvement.

The project conducted an extensive analysis of about 30 school improvement projects in eight countries (The Netherlands, Finland, United Kingdom, Belgium-French Community, Greece, Italy, Spain, and Portugal).

### Key Conclusions

The key outcome was the Effective School Improvement (ESI) framework based on the theoretical and practical analysis of school improvement projects. The school is put at the centre of this framework that can be used by:

- Practitioners - for designing, planning and implementation of school improvement.
- Researchers - for further research in the field of effective school improvement.
- Policy makers - as it helps to clarify which factors must be taken into consideration in the planning of improvement processes in schools. However they must be aware that the framework can never be used as a recipe for effective school improvement or as a ready-made toolbox for the implementation of improvement in schools.

Helped by this framework the following conclusions were reached:

1. Schools and school improvements must always be considered within the educational context of a country.
2. Even if an improving school is free to decide about their improvement outcomes they will always have to be in line with the wider educational country context which exert influence through:
  - Pressure to improve
  - Resources for improvement
  - Educational goals

3. Effective school improvement requires whole school processes aiming to enhance the quality of instruction in classrooms. Individual teachers can never promote lasting changes in the school. The school organisation may add or subtract value to that of its individual members.
4. Schools with little team collaboration might expect to find a large variation in the performance of pupils. However, in a well-led and managed school there is likely to be less variation and greater consistency across the school. This results in the “school effect” - adding value to that of individual teachers
5. However, in most countries studied, the school, as an organisation does not currently play a major role in effective school improvement.
6. Most current practice seems to target teachers as important for influencing effective school improvements. However:
  - Teachers tend to work independently, perhaps without a school plan of common goals and methods.
  - Inspectors assess only teachers not the schools.
  - Teachers are placed centrally at schools, which might reduce their involvement in school improvement.
  - The principal's main function is administration rather than fostering educational leadership and may be elected for a short time period thus reducing their central role in managing school reform.
7. However, in some countries there is evidence to point to the importance of the school as an organisation:
  - Use is made of effective school knowledge - by making schools accountable for inspection results that are published in newspapers and the Internet.
  - The development of schools as “learning organisations” is fostered by, example, peer coaching, team staff development and schools receiving earmarked funds for staff development.
8. Schools do need some form of external pressure from the educational context to start improving. Four types of pressure were distinguished:
  - *Market mechanisms* - competition between schools - leading to consumers (parents) being better informed about the schools' quality. However, it can result in parents' preference for traditional schools, the creation of white and black schools and inequality between schools.
  - *External evaluation and accountability* - generally concerns the measurement of student outcomes with a national validated test. When the results are published schools are held accountable and are under pressure to positively change student outcomes. However, this can lead to negative consequences like helping students with the tests. If sanctions are high, schools can be closed down. Sometimes evaluations may not be fair.
  - *External agents* - such as inspectors, policy makers, educational consultants and researchers may push schools to improve by giving suggestions of what and how to improve.
  - *Participation of society in education and societal changes* - society influences schools in many ways and demands school improvement that is often mediated by government policies responding to influences like learning to learn how to study and the use of information technology. Sometimes these changes are receiving wide support, but there is a limit to the amount of changes schools are willing to perform.
9. Material and non-material forms of support are essential for effective school improvement. Three forms of support are distinguished:
  - *Granting autonomy to schools* - this could be in the form of educational goals, educational means, organisation (personnel, management, administration) and finances. For effective school improvement some autonomy is necessary because improvements, which do not tailor to school's needs, are likely to fail. The success of autonomy depends to a large extent on the willingness and capacity of the school team to continuously improve in the direction of a more effective school. Some forms of external control seem to be a requirement to stimulate schools to use their autonomy in a 'good' way.
  - *Financial resources and working conditions* - with sufficient financial resources and time, improvement will succeed more easily. Large classes, a large amount of teaching hours and instability of education policies do not contribute to the motivation to improve.
  - *Local support* - from parents, district officials, school administrations, and school boards.

## Key Recommendations

1. Efforts should be made to reduce the negative aspects of market mechanisms.
2. External evaluations should take place at regular periods. The results should be presented in a fair way in order to show what value has been added since the last evaluation. The information collected should be primarily aimed at helping school improvement.
3. High quality external agents should be used as facilitators of effective school improvement.
4. Care needs to be taken not to overload schools with innovations.

## The Final Report and results of this project are available:

[Full final report](#), [Abstract](#), [Summary](#), [Partner details](#)

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[Back to table of contents](#)

### Research Institutions:

Ministère de l'Education  
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Programme of FP4

### Context of the Research

Substantial scientific improvements have been made in the field of student outcome indicators over the years. The focus of these studies has, however, been limited to the traditional assessment domains of Reading, Mathematics and Science. Due to rapid technological and social changes there is a growing demand for competencies beyond these traditional domains, such as problem solving, communication skills, and learning to learn. There is thus a widely acknowledged need for broader indicators and the ability to monitor these competencies that lie outside traditional domains.

This project developed a thematic network consisting of European expertise to specifically address cross-curricular competencies in the area of problem solving and tools for assessment. It has brought together a European body of knowledge about problem solving which is making a major contribution to worldwide initiatives like that of the OECD, in order to gain a better understanding of the processes of problem solving and how it may be assessed for comparative purposes.

### Key Conclusions

The following key conclusions were reached:

1. From the societal as well as from the educational perspective, problem solving can be seen as a cross-curricular competence.
2. However, scientific research into problem solving has until recently tended to be conducted from a psychological perspective with little attention being paid to the assessment of problem solving for large scale comparative purposes.
3. Thus a gap has emerged between developing theory on thinking and problem solving and ways of measuring problem solving for assessment purposes.
4. There now appears to be agreement that problem solving is a cognitive process with several stages for which a person uses their working, short term and long term memory.
5. However, there is still debate on whether problem solving is a domain specific competence or a general competence.
6. There is also debate on whether a problem for measuring problem solving should be simple or complex.
7. Problem solving is a competence needed in daily life problem situations and needs to be measured.
8. Instruments that measure problem solving, as a cross-curricular competence for large-scale assessment is starting to emerge.
9. But, instruments to measure problem solving still need to be modified or adapted for large-scale comparative studies.

10. Although, it has been found that assessment of more complex competencies, like problem solving, is feasible outside of a purely laboratory environment, and assessment of problem solving skills on a large-scale is possible.
11. The use of technology raises new opportunities in the assessment of skills and competencies compared to current paper-pencil based methods.
12. In fact, the dynamic aspects of problem solving cannot be grasped without technological support.

### **Key Recommendations**

The following recommendations were made:

1. There is a need to develop new assessment tools that measure general problem solving competencies.
2. Further research should be conducted into technology-based assessment methods of problem solving including the use of simulations, video, computer networking and virtual reality.

**The Final Report and results of this project are available:**

[Full final report](#), [Partner details](#)

[Back to table of contents](#)

**Research Institutions:**

The Research Institute of the Finnish Economy, FI

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University of Zurich, CH

National Institute of Economic Research, SE

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**Context of the Research**

National education systems across Europe initially appear to be fairly similar and are mainly financed by government, but clear differences start to emerge when comparisons are made between student tuition charges, grants and loans, and fiscal compensation allowed to parents. In fact, in many countries the share of costs borne by students and/or their parents has shifted over the last decades.

Simultaneously there is a political debate on the most desirable system of financing. This debate shifts between the need to reduce government deficits by budget cuts and the need to increase the knowledge base of the population in order to maintain a European competitive edge.

This project has studied the impact of different systems of public financial support for the education of individuals and other factors affecting their uptake of educational opportunities. In particular the study looked at individual “returns on education” i.e. the economic gains an individual may make by investment in their education. Investment of money may come from the individual, the public or private sector or a combination of both. Gains can be measured in terms of increased job opportunities and higher wages.

Drawing upon national data, the project has attempted to make a number of European-wide observations of trends concerning returns on education and their impact on the labour market in terms of the levels and dispersion of inequality in earnings.

The project involving 15 European countries (Austria, Denmark, Finland, France, Germany, Greece, Ireland, Italy, the Netherlands, Norway, Portugal, Spain, Sweden, Switzerland and the UK) has examined broad national data sets containing extensive individual-level information on wages and education. It has also linked the observed patterns and trends to national educational systems and policies.

**Key Conclusions**

The following conclusions were reached:

1. The estimated individual returns on education differ considerably across Europe. They can be classified into three groups of countries:
  - Those with a low average return on education (Scandinavian countries and the Netherlands).
  - Those with a high return on education (Ireland and the UK).
  - Those in-between these two extremes.
2. There are no signs of a convergence of returns on education across the European countries. Some countries show a downward trend in rates of return, others are characterised by an upward trend, while still others display no time trend whatsoever. The trend can differ for men and women within a single country.
3. In the future this may result in higher mobility across national borders, particularly of highly educated people trying to exploit these cross-country differences in the rewarding of individual investment in education. The rapid expansion of the use of information technologies could be expected to boost such a development, since the possibility of working and living in separate places becomes a reality.

4. Separate analysis of the wage differentials between college-educated and high school educated employees, the so-called “college wage gap”, also displays considerable variation across the countries studied.
5. The evidence suggests that investing in the education of individuals raises their productivity in working life, and thus contributes to productivity and output growth in the economy. This strengthening of the national economy justifies governmental involvement in the production and financing of education.
6. Throughout Europe there is a potentially higher than average return on education from socially deprived groups of people who have acquired little education. This points to substantial individual and social gains to be obtained from policies aimed at lowering the number of early school-leavers.
7. Since education still contributes substantially to the wage differences, as observed in European labour markets, improving the educational attainment level of the less educated is likely to reduce wage inequality.
8. It is nearly always beneficial for individuals to educate themselves more, rather than less as they can secure a higher entry wage and better wages throughout their working life.
9. However, there are wage-inequality-related factors that potentially may work in the opposite direction like the supply of educated individuals exceeding the demand for an educated workforce.
10. Across Europe there are also wage inequalities amongst individuals who have attained the same education. These inequalities tend to increase with the level of education taken - thus creating a “wage risk” for those taking further education. This within-educational-level inequality may seriously mitigate or even outweigh the decline in overall wage inequality that is commonly expected to arise from increased education.
11. European labour markets are characterised by considerable uncertainty with regard to the actual return that individuals can get from their investment in higher education. Returns are riskier the higher the country’s average return on education.
12. Employment prospects (the risk of becoming unemployed) and unemployment benefits are likely to influence individual education decisions. Some generalisations can be made:
  - What matters is the difference in unemployment rates between educational levels rather than the absolute unemployment rate for differently educated employees.
  - Employment expectations affect incentives to invest in further education more at the lower end than higher up the educational scale.
13. The enormous expansion in public funding of higher education, particularly in the 1990s, resulted in a substantial growth in the supply of highly educated employees.
14. The real value of public expenditure on higher education grew by more than 80% between 1980 and 1996 in the countries studied.
15. Over the same time period the supply of employees with a higher (tertiary) education relative to those with a secondary or lower education roughly doubled.
16. However, the relative wages of highly educated employees have shown an increasing rather than a decreasing trend due to the demand for highly educated labour expanding at an even faster rate.
17. There is also a variation in the level and the growth rate of public expenditure on higher education, with countries having started from a lower level showing higher growth rates.
18. Increased public expenditure on higher education does have a strong positive impact on the supply of highly educated labour.
19. But, entry exams in the high-school system and tuition fees are also found to influence enrolment.
20. In contrast, at the time of the study, returns on education and unemployment rates for younger age groups do not appear to affect enrolment into higher education.
21. However, this is in line with the other results the project obtained. There is no significant effect of relative wages on relative supply when contrasting tertiary education against secondary and lower education. Also, employment expectations are found to play a less important role in steps from medium to high levels of education than from compulsory to non-compulsory education.
22. In countries with an extremely low return on education, there is an obvious risk that a growing number of young people will decide not to invest in higher education.

23. It was confirmed that government ideology especially and also the type of government has played an important role in differences in public expenditure across and within countries over time.

### Key Recommendations

1. As socially deprived groups provide a higher return on education considerable importance should be attached to identifying individuals within this group in order to provide them with incentives to continue in education.
2. Further research is needed into the interrelation between within- and between-educational-level wage inequalities.
3. Increased efforts are needed to produce and make accessible data that can be more easily compared across Europe.

### The Final Report and results of this project are available:

[Full final report](#), [Abstract](#), [Summary](#), [Partner details](#)

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[Back to table of contents](#)

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**Context of the Research**

Throughout the European Union, countries are investing heavily in lifelong learning due to the need to address issues like an aging workforce, the rapid technology changes and increased challenges to competitiveness as a result of globalisation of firms. There is also a growing recognition that structural unemployment and poverty can only be addressed through a holistic approach to education, training and personal development.

Unpredictable and constantly changing job situations that require more individual adaptability have also led employees to increasingly seek training, continuous professional development and lifelong learning throughout their working lives. The extent to which companies use training and development to improve their workforce will affect their overall success in a global market.

This Project has studied the learning environments and strategies for learning, training and development in knowledge intensive and innovative units of companies in Denmark, Sweden, The Netherlands, Republic of Ireland and the United Kingdom.

**Key Conclusions**

1. Changing job situations are the driving force for the take-up of lifelong-learning and training.
2. Certification should not be considered as more important than the learning or the competencies involved.
3. Learning opportunities are highly valued by employees and many chose the jobs that offered more opportunities for learning, training and development, because of this, their learning motivation was very high.
4. However, opportunities to pursue educational programmes that lead to recognised qualifications are limited for employed people. This is due to:
  - External educational establishments providing the programmes.
  - Time - full time or part time (evenings) courses do not fit around employment and clash with travel, time, family, and work commitments.
5. Although, most companies have training for new employees, this generally involves mentoring but is not generally followed by continuous and innovative learning.
6. Without adequate time for learning, employees' knowledge becomes fragmented on an individual and a collective level.
7. In addition, deadlines and a hectic work pace leads to spontaneous problem solving and learning but time constraints do not allow for any reflection, integration or incorporation of what has been learnt.
8. Learning environments are created to a large extent by line responsibility, access to mentors and the organisation of work in teams and projects.
9. The most important factors for learning environments are:
  - Work and the organisation of work.
  - an open culture for sharing information and knowledge through mentoring.
  - Collaboration in projects/teams.
  - Networks – face-to-face and though ICT.

10. In addition, important learning conditions involve having the time to learn effectively and the ability to prioritise what needs to be learnt.
11. The benefits of learning networks/environments are:
  - Problem solving without involving units, managers or other channels of command/structural barriers. This relies on each employee being aware of each other's strengths.
  - Speeding up learning and creative processes by matching creative people with each other, facilities and resources.
12. However, companies are not currently interested in evaluating learning, training and development.
13. Learning alliances between universities/research institutes and companies are considered helpful in updating companies with technological developments.

## **Key Recommendations**

1. Priorities for lifelong learning should include:
  - Expanding access to education and training.
  - Increasing access to suitable programmes for adults who wish/need to update their occupational skills and/or personal development.
2. Courses need to be more flexible and greater economical support must be made available to employees for lifelong learning.
3. Additional co-operation between research, education and certification is needed to meet the needs of training, as regular courses are not covering the needs of employees.
4. Governments and educational institutions should support organisation-specific and internal training activities for knowledge intensive organisations.
5. Alliances between companies, university and research institutes should be stimulated and competency frameworks should be implemented. This could potentially unify corporate culture.
6. European Union policies should concentrate on ensuring transparency for qualification equivalents and encouraging the free flow of information to encourage international employability.
7. Business strategies should be based on creative learning at work, which in turn, should be based on actual and possible business strategies. Communications between business management and employee learning also needs to be improved.
8. The management of learning needs to be supported and integrated as a valued part of the organisation. It should involve the learner, the planners (teachers/trainers) and colleagues.
9. Learning opportunities also need be closely related to work to ensure they are relevant to work and the development of work.
10. Time is critical for successful learning, therefore time for learning should be considered as fundamental for employees' development.
11. There also needs to be more time for reflection and for the integration of new knowledge and skills into personal competence and the company.
12. In addition, an open learning climate is needed to encourage learning and innovation from all employees, including those who are not responsible for innovation.
13. Eventually, organisations may need to move away from a competitive culture to a sharing culture to develop effective learning environments.

14. There is potential for further research on:

- The relationship between business strategies and learning, training and development as a basis for development.
- The increased responsibility for line managers, team leaders and project leaders to create good learning environments and develop into educational leaders.
- How culture and forms of co-operation at work forms a basis for learning. The impact of teamwork, innovative work and support on the success of a business and a personal level. The varying character of mentoring is a particularly interesting area of research.

**The full title of the project is:** *In-Company Training and Learning in Organisations (LATIO)*.

**The Final Report and results of this project are available:**

[Full report](#), [Abstract](#), [Partner details](#)

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[Back to table of contents](#)

## Computer-Supported Collaborative Learning in Primary and Secondary Education

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### Context of the Research

Developments in information and communication technologies are starting to make it possible to use the tools for assisting the process of learning beyond the boundaries of the classroom. In addition, their use will start to prepare learners for participation in a networked, information society where knowledge is the most critical resource for personal, social and economical development.

School children and students increasingly need to acquire the individual and the group learning skills for use in learning societies and learning organisations. They need to acquire the skills that enable them to cope with an abundance of information in order to build knowledge and thus learn from the knowledge acquired.

This project has explored the effectiveness of Computer-supported Collaborative Learning Networks in creating a community of learners who use educational technology to build knowledge together through learning environments. Experimenting with different kinds of educational software, the project studied 25 teachers from 20 schools and almost 600 students from primary (10-12 yrs), secondary (13-16 yrs) and vocational (18-24 yrs) education in five countries (Belgium, Finland, Greece, Italy, and The Netherlands).

### Key Conclusions

The following key conclusions were reached:

1. Computer-supported collaborative learning requires teachers and students to adopt an educational philosophy that focuses on “knowledge building” rather than “knowledge reproduction” as the main learning activity.
2. This requires both teachers and students to believe in and trust a learning style that involves active, self-regulated, constructive and contextualised learning by groups of students more or less independently.
3. However, not every student or teacher is used to this way of learning and for many it was not easy to learn together with other students. In addition, it is not easy to integrate this new educational philosophy with existing philosophies in schools.
4. Although other research has shown that co-operative learning is effective, if students have common goals and interests combined with individual accountability, in reality, it hardly occurs within existing school practice.
5. However, it was considered that computer support does add value by:
  - The easier organisation in the classroom of collaborative learning.
  - Better visibility of collaboration processes involving of all students.
  - Making communication patterns visible and structuring types of communication.
  - Making types of thinking visible and organising enquiry-based learning.
  - Learning to build knowledge and meaning collectively.
  - Building connections with practice; and opening new forms of collaboration with other classrooms, schools, nations, and other partners like museums and universities.

6. Teachers and students do like to work through computer supported collaborative learning, however it is not easy to integrate new didactical practices into existing curricula. Also, international exchanges seem to have a positive effect on the motivation of both students and teachers.
7. But, teachers do not have the time for support or preparation of assignments and questions for use within a computer supported collaborative learning. Nor, are there enough didactical materials, or examples of good practice to help them fulfil their new roles.
8. Although it was not possible to identify a strong correlation across the various computer supported collaborative learning environments studied, various positive effects were found:
  - There was relatively consistent evidence of students showing more interest in collaborative learning.
  - The practises of learning and instruction changed considerably.
  - Students worked in a more self-regulating way, directing their own projects.
  - The amount and quality of social interaction between teachers and students increased.
  - Students developed skills for using information technology and basic knowledge acquisition. They learned to access extended sources of information and motivation increased.
9. It was found that there were significant advantages in using computer-supported collaborative learning in mathematics and languages, and in process-oriented measures like the quality of question raised and depth of explanation.
10. The suitability of the software is also critical to computer-supported collaborative learning. However, the project found that although multimedia elements make network applications attractive, there is no evidence that they have pedagogical value without carefully planned instructional strategies and adequately educated teachers.
11. Unlike the scientific communities, practising teachers do not consider highly the role of computer-supported collaborative learning within future learning environments. This is partly due to its novelty, but also highlights that the theoretical and practical principles of computer-supported collaborative learning are too immature to be adopted as practical educational reforms.
12. Nevertheless, a form of computer-supported collaborative learning would be the most desired way to implement desired changes in educational practises like changing the educational philosophy of teachers and students.

## **Key Recommendations**

The following recommendations were made:

1. There is a need for theoretically well-grounded development of computer-supported collaborative learning practises and tools that are embedded in a practical educational context.
2. Effective infrastructures need to be established to ensure computer and computer networks are optimally utilised. Specialist IT technicians should be responsible for maintenance to enable teachers to concentrate on teaching.
3. Additionally, any technology needs to be adaptable to the instructional needs of teachers and to the daily realities of classroom life.
4. To effectively implement computer-supported collaborative learning in schools, financial support is needed for:
  - Adequate teacher training.
  - Extra hours for teachers to design assignments and questions.
  - Computers and software.
  - Pedagogical support.
5. Support is also needed for the creation of electronic communities for teachers, which can aid the development of new learning methods and help establish learning communities.
6. School libraries needs to become multimedia centres, central to schools in order to promote individual learning and small group work with librarians trained to be guides and tutors in the search for information.
7. Teachers also need training to develop technical expertise and know-how and to learn to be more effective guides and tutors.

8. Opening schools to activities beyond school time could facilitate the participation of Institutions (within schools' territories) in the educational community.
9. Educational research and the policy of national school institutions must be integrated as current research is artificially constructed and results in outcomes that scarcely affect changes. School administration, scientific institutions and school authorities must be fully involved in defining the needs of an ecologically valid experimental setting.

**The Final Report and results of this project are available:**

[Full final report](#), [Abstract](#), [Summary](#), [Partner details](#)

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[Back to table of contents](#)

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of FP4

**Context of the Research**

This project examined the effects of greater education opportunities and higher education levels on the labour market. The aim was to analyse the long-term consequences of the rise in levels of education on access to employment and on human resources management.

Taking a comparative approach, four major questions were addressed:

- What are the processes and factors of influence leading to educational expansion?
- How have generations with increasing levels of qualification spread throughout the employment system, and with what returns?
- What has been the influence on company organisation and management of human resources and what links have been established between skills supply and demand?
- What are the implications for national systems linking education with employment, and to what extent are countries converging or diverging?

The analyses provide a well-founded basis to understand and shape the links between education and employment, and thus between the supply of and demand for skills on the labour markets.

**Key Conclusions**

The following key conclusions are based on collaborative research conducted by British, French, German, Italian and Spanish teams, with comparative reference to the United States.

1. Education Expansion:

- Relies on the equality of opportunity.
- Has a low sensitivity to economic cycles.
- Seems to have recently stabilised in most countries studied.
- Has mainly been driven by families and the State, although employers have had an indirect influence on vocational education expansion.
- After 1935, each generation has become more highly educated than the previous one in all countries studied.
- Was supported by development of explicit initial qualification levels.
- Is a product of longer compulsory education and an increase in post-compulsory education.
- Has led to a considerable fall in the amount of people with no qualifications.
- Has shifted the emphasis towards higher education.
- Has resulted in the catching up of countries where education was poorly developed. But structural differences still remain between countries despite a similar growth in development.
- Has resulted in more development within systems where general and vocational education is under the single responsibility of one State compared to those that are not.

*The effect of education expansion on qualifications within occupations:*

1. The labour market is based on the supply and the demand for skills. Individuals have access to a specific job if they have the minimum skills required, consisting of a combination of their qualifications and their working experience. Although, the level of formal education taken tends to be the main way of acquiring and reaching the required skills, work experience can also be a substitute for skills acquisition.
2. Educational expansion has spread within all occupations under the strong impact of educational supply. It barely depends on changes in the size of occupations.
3. Overall, educational expansion has been remunerated, as a result of changes in access conditions to jobs.
4. Because of the increase in the number of those eligible for management positions, the likelihood of being appointed has tended to decline amongst generations born after 1940.
5. Qualifications also have a symbolic social value. Therefore, if their value decreases, some people will lower their expectations and others will aim for higher qualifications.
6. The educational system has been an increasingly important variable for young people's careers.
7. The educational demands of new generations are expected to be more variable and flexible, as they will follow economic situations more closely.

*The effect of education expansion on employers and the labour market:*

1. Education levels of recruitment are rising in all the five countries and across the sectors studied.
2. Companies are undergoing technological and organisational changes that are leading, in human resource management terms, to a greater need for skills and flexibility.
3. Educational expansion and the resulting increase in more qualified people was a response to employers' actual and anticipated needs for more adaptive skills.
4. Continuing education and training is becoming increasingly important for the development of skills required by employers. Therefore companies could encourage their staff to return to study through this route.

*The effect of education expansion on government and the economy:*

1. Post-compulsory education is a crucial factor in stabilising or raising education levels, yet the development and diversification of higher education is dependent on National policy.
2. Up to now, the needs for better qualified workers in the economy have been satisfied by States who has anticipated these needs by expanding education; and by families who have encouraged more participation in education. In this way both stakeholders have anticipated the needs of the economy.
3. Governments are encouraging greater flexibility and accessibility within the education system without any substantial change in the overall costs of education.
4. Changes in the education system are generally responses to socio-economic tensions and developments.
5. The needs of the economy may not necessarily be the same as employers' needs, which tend to be dominated by short-term requirements. Therefore, education institutions and governments must adopt a long-term vision of educational development in response to the longer-term needs of the economy.
6. However, the economic and employment markets cannot be expected to provide education systems with the long-term information they need to guide their development.
7. The skills demanded by the economy of one State are jointly produced by its education and employment system. However, each State's education and employment systems are different requiring cooperation between both systems if all the States are to become standardised.

## Key Recommendations

The following recommendations were made:

1. There should be no standardisation of the education systems throughout Europe. However, there should be a gradual build up of some common points of reference, especially for similar levels of education.
2. There could be changes in the area of skills development where certificated courses provided by continuing or lifelong education complement and partially replace the certificated courses provided by initial education systems. This would take the form of: -
  - Greater flexibility in young peoples' educational demands.
  - Some form of work during compulsory education.
  - New opportunities to choose between continuing compulsory education and returning to study after a period of work.
  - The creation of opportunities for workers to access continuous education and training.
3. There is a need for universities to demonstrate that the education they offer is adequate for this increasingly complex world.
4. Education systems should mainly focus on providing compulsory education in the context of meeting macro economic needs and employers' requirements.
5. However, educational institutions should avoid being dependent on employers as they are governed by the temporary economic needs of the market.
6. Educational institutions should move away from managing education in a more traditional academic manner as this ignores social and economic needs.
7. There is a need for a greater understanding of individuals; institutions and employers time scales for skill development, because employers generally look at short-term skills that suit the market without worrying about their future use, whereas individuals generally undertake long periods of education in their youth and have long-term expectations for the skills they acquire.

## The Final Report and other results of this project are available:

[Full report \(French version\)](#), [Full report \(Spanish version\)](#), [Partner details](#), [Website](#)

French version published by LIRHE, Toulouse, France

English version published by CEDEFOP, Thessaloniki, Greece

Spanish version published by Ministère du travail, Madrid, Espagne

The English version of the full report is available through CEDEFOP at <http://www.cedefop.eu.int>

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Béduwé & Germe, *Les logiques de l'élévation des niveaux de formation : de la hausse à la stabilisation*", note Lirhe 03-02, (Toulouse), January 2003.

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Frey & Ghignoni, *Fattori istituzionali, fattori demografici e capitale umano nel Mezzogiorno d'Italia*, Aa. Vv., L'importanza della riforma universitaria in corso in Italia, Quaderni di Economia del Lavoro n. 74, p129-168, Franco Angeli, (Milano), 2002.

Frey & Ghignoni, *Istruzione, prospettive professionali e di reddito, e comportamento dell'offerta di lavoro giovanile*, Aa. Vv., Flessibilità, istruzione e lavoro giovanile in Italia, Quaderni di Economia del Lavoro n. 68, Franco Angeli, p63-96, (Milano), 2000.

Ghignoni E., *Frontiere di competenza, "overeducation" e rendimento economico dell'istruzione nei mercati del lavoro italiani degli anni '90* Rivista di Politica Economica, p115-158, July - August 2001.

Ghignoni, *Istruzione e condizioni monetarie e non monetarie di lavoro nel Mezzogiorno*, Aa. Vv., L'importanza della riforma universitaria in corso in Italia, Quaderni di Economia del Lavoro n. 74, p169-189, Franco Angeli, (Milano), 2002.

Haas J., *Les transformations récentes de l'accès à l'enseignement supérieur en Allemagne*. Education and Formation, numéro spécial Enseignement supérieur, 2003.

Planas & Sala, *Education/employment interfaces. Skills and statistical coverage*. Eurostat: Education and training statistics and the functioning of labour markets 10<sup>th</sup> CEIES (Eurostat) Seminar, Office for Official. Publications of European Communities, p163-171 (Luxembourg), 2001.

Planas & Sala, *Escenarios de futuro para la educación en España*, Revista de Educación, Espagne, 2003.

Planas, Sala & Vivas *Prospettive dell'istruzione in Spagna.(2000-2020)* Quaderni di Economia del Lavoro 74 p91-108, 2002.

Planas, Sala & Vivas, *Il mercato delle competenze: nuove strategie*, Quaderni di Economia del Lavoro 74 p109-129, 2002

[Back to table of contents](#)

**Research Institutions:**

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of FP4

**Context of the Research**

Innovations in science education are increasingly needed in order to foster greater scientific literacy. Results from science education research and the additional technological resources now available are contributing to a change of views with regard to the content, teaching/learning processes and methods, and the role of teachers in science classes. Challenging new ways of teaching and learning are becoming available but can only be implemented when teachers feel faithful to adopting them.

This project has focused on understanding the conditions that may enable curricular innovations to be transformed into successful implementations by science teachers. At secondary school level, the project studied the implementation of informatic tools (for modelling, simulation and for real-time experiments); the implementation and use of specific images; and the implementation of innovative teaching sequences.

Within five countries (France, Italy, Norway, Spain, and the United Kingdom) the project observed experienced science teachers in real classroom situations. The teachers had volunteered and were well motivated to adopting the curricular innovations. The observation of their classes could give relevant clues to the process of introducing innovation in real science classes.

**Key Conclusions**

The following general conclusions were reached:

1. The introduction and embedding of didactic innovations into the school system for natural and normal usage is a complex process.
2. The innovations need to be flexible and robust, in order to ensure that the intentions of a designed innovation are shared by teachers, who have to proactively implement them.
3. Didactic innovations go through a “metabolic process”, which may be long, before they are fully “naturalised” i.e. thought and used as natural and appropriate strategies/tools for teaching/learning.
4. Internalising innovative approaches entails broad acceptance of their rationale and also means becoming capable of implementing them in different contexts and situations and interpreting them in resonance with their didactic intentions and potentialities.
5. Although, initially, an innovation needs to utilise specific content within a particular classroom context, the transformations done during its take-up can transverse to other contexts.

Specific conclusions relating to the use of informatic tools:

1. Very few teachers have a lot of experience in using computers and many teachers have very little experience.
2. There is still a lot of uncertainty about the role of computer as an integral part of education.

3. In all the countries studied, there are policies to develop computing in schools but there are substantial differences in the actual provision of computers.
4. Generic software seems to prevail with word processing packages used the most, followed by spreadsheets.
5. Simulations are strongly used by a few teachers, however their use is not generalised yet.
6. Modelling tools are rarely used despite some very strong arguments in favour of their importance.

Specific conclusions relating to the use of images:

1. As information society is creating a culture in which images acquire a higher profile as a way of communication, the use of images in science teaching is increasing.
2. Images should be presented as a coherent whole of different elements aiming at conveying a message.
3. Images are not trivially understandable. It is important to know which are the features of the images that might lead the students to have difficulties in interpreting them.
4. Students tend to make narrative readings of the images, i.e. to interpret them as if they had a story-like structure giving excessive relevance to elements (as arrows) or compositional structures (as left to right arrangement) that can convey such a message.
5. The teachers' awareness of the students' difficulties reading images is not always very high. The interpretation of the difficulties expressed by their students should be emphasised.
6. When facing documents (images and text) that do not include all the information students need to interpret them, students often resort to interpreting mechanisms that can be related with lack of scientific background and/or insufficient knowledge of the visual language. That is, misreadings are observed when necessary information is missing from the document.

## **Key Recommendations**

The following general recommendations were made:

1. Teachers need positive assistance in coping with the transfer of innovations into actual class-work. To favour the take-up of innovations, appropriate teacher training is a crucial element, even if this alone cannot guarantee successful adoption by teachers of the innovation.
2. In order to acquire the know-how needed for the successful adoption of innovations, teachers need to be supported in becoming well aware of why the innovations are proposed. There should be emphasis on problems deriving from traditional teaching with examples of both students' learning difficulties and inefficient teaching strategies.
3. The training should address explicitly and extensively why the "old" approaches need to be avoided, modified, integrated with the "new".
4. As critical details of an innovative approach may deeply affect its impact, training should explicitly explain, show and illustrate, through real examples, that without appropriate detailed actions the innovative effects are easily reduced or nullified.
5. However, teachers' choices and actions depend on various factors, which include the disciplinary knowledge, convictions about teaching and learning processes, viewpoint about the role and relevance of lab-work, interests and objectives, image of science, social and communication capabilities.

6. Training should focus on helping the teachers become aware of and grasp a holistic view of innovation including topics, concepts, and approaches and not fragment into small-unrelated pieces. There should be emphasis on establishing links between the scientific contents that constitute a didactical unit, as well as between the proposed activities, questions, specific episodes, etc.
7. Special focus is needed on increasing teachers' awareness about careful planning of the cognitive dimensions of class activities as well as of their practical aspects.
8. Training should extensively explain and show the need to be extremely careful with all types of language used. Care is needed in drawing, reading and interpreting graphs, schemas and diagrams. It is necessary to be able to express scientific terms in everyday language, as well, to correctly use the scientific language in the scientific domain. To cross both domains has been detected difficult for teachers as well as for students. Therefore, an analysis of the understanding of new scientific concepts and words should be carried out in order to verify their correct usage.
9. There should be analysis of existing teaching materials (texts, images, activities, worksheets) in order to avoid needless misunderstanding or misleading of the concepts.
10. Special attention should be paid to encourage students to interact verbally with peers about the tasks and activities proposed, in order to improve understanding and learning.

Specific recommendations were made relating to the use of images:

1. Teachers should be trained about the grammar of visual language so that their drawings, schemes, graphs and diagrams convey the ideas and concepts that they desire.
2. Students and teachers should have specific training in the use of real-time graphs produced in experiments based on computer driven sensors. The optimisation of image's readability and the interpretation of the unique features of real-time graphs, including artefacts, should be particularly addressed.
3. Authors and designers of images should collaborate with curriculum (didactic) experts to optimise the suitability of images and concepts according the level of students' understanding.

Specific recommendations were made relating to the use of informatic tools:

1. Training should consider that the use of IT in science is still 'fragile' and 'patchy', even this situation is changing rapidly.
2. Attention should be focused on the new opportunities created by the use of IT in science courses. The IT "real-time experiments" saves time of capturing data in labwork, and allows teachers to have more time for students' interactions, for the analysis of different variables and for the rapid repetition of experiments.
3. Claims that IT helps deepen understanding need to be backed up with specific examples of classroom activities and an analysis of the benefits that are felt to be associated with them.
4. Training should aim at creating clusters of teachers in each school in order to diffuse expertise among fellow teachers and potentially greatly increase the take-up of innovations based on IT.

**The Final Report and results of this project are available:**

[Full final report](#), [Abstract](#), [Summary](#), [Partner details](#), [Website](#)

## Key Publications

A special issue on visual language in science education with STTIS results has already been accepted for publication in the International Journal of Science Education Vol 24, n° 3. The special issue includes six papers:

Amettler & Pintó, *Students' reading of innovative images of energy at secondary school level*

Colin, Chauvet & Viennot, *Reading images in optics: students' difficulties, and teachers' views.*

Pintó, R., *The Science Teachers Training in an Information Society Project.*

Pintó & Ametller, *Students' Difficulties in Reading Images: Comparing Results from Four National Research Groups.*

Stylianidou, Omerod & Ogborn, *Analysis of Science Textbook Pictures about 'Energy' And Pupils' Reading Of Them.*

Testa, Monroy & Sassi, *Students' reading Images in Kinematics: The Case Of Real-Time Graphs.*

Results of the project have been also published in:

Komorek, Behrendt, Dahncke, Duit, Gräber & Kross (eds.), *Proceedings of the Second International Conference of the European Science Education Research Association (E.S.E.R.A.). Research in Science Education. Past, Present, and Future*, (Kiel, Germany), 31 August-4 September 1999.

Pinto & Suriñach (eds), *International Conference Physics Teacher Education Beyond 2000. Selected Contributions*, Elsevier Editions, ISBN: 2-84299-312-8, (Paris), 2001.

Pinto & Suriñach (eds), *Proceedings of the International Conference Physics Teacher Education Beyond 2000 CD Production Calidos*, ISBN: 84-699-4416-9, (Barcelona), 2001.

Research reports:

Balzano, Giberti, Monroy & Sassi, *Transformations done by teachers when using an IT: the case of MBL (micro computer based laboratory)*, NR1.2-IT, 1999.

Chauvet, Colin & Viennot, *Reading images in optics- Students difficulties, teachers' views and practice.* NR2-FR, 1999.

Chauvet, Hirn, & Viennot, *Investigation on teacher transformations when implementing teaching strategies*, FR NR3, 1999.

Contini, Ott & Sassi, *The State of the Art in the Use/Value of Informatic Tools*, NR1.1 -IT, 1999.

Monroy, Testa, Giberti, & Sassi, *Transformation of didactic intentions: The Italian case of motion and force proposal*, NR3-IT, 1999.

Pinto & Ametller, *Using images to teach Energy: students' difficulties, teachers' interpretations and teachers' transformations*, NR2-SP, 2000.

Pinto, Ametller, Chauvet, Colin, Giberti, Monroy, Ogborn, Ormerod, Sassi, Stylianidou, Testa & Viennot, *Investigation on the difficulties in teaching and learning graphic representations and on their use in science classrooms*, RW2. STTIS Project, 2000.

Pinto, Gutierrez, Ametller, Andresen, Balzano, Boohan, Chauvet, Colin, Couso, Giberti, Hirn, Kolsto, Monroy, Ogborn, Quale, Rebmann, Sassi, Stylianidou, Testa, Viennot, *Teachers Implementing Innovations: Transformations Trends*, RW4, 2001.

Pinto, Ametller, Boohan, Chauvet, Giberti, Gutierrez, Monroy, Ogborn, Ormerod, Quale, Sassi, Stylianidou, Testa, Viennot, *Dissemination activities. Presentation of the STTIS results at the International Conference Physics Teacher Education Beyond 2000*, RW6, 2000.

Pinto, Perez & Gutierrez, *The State of Art in the Use and Value of Informatic Tools - The Spanish case.* NR1.1-SP, 1999.

Pinto, Perez & Gutierrez, *Implementing MBL (Microcomputer Based Laboratory) technology for the laboratory work in Compulsory Secondary school Science classes*, NR1.2-SP, 1999.

Pinto & Gomez, *Teaching about energy in Spanish secondary schools: teachers transformations of innovations*, NR3-SP, 1999.

Quale, Andresen & Kolst, *The State of Art in the Use and Value of Informatic Tools. The Norwegian case*, NR1.1-NO, 1999.

Quale, Andresen & Kolst, *Using IT-tools in the teaching of physics in Norwegian secondary schools: intentions, expectations and practice*, NR1.2-NO, 1999.

Rebmann, G., *The State of Art in the Use and Value of Informatic Tools. The French case*, NR1.1-FR, 1999.

Rebmann, G., *Investigation of actual use of informatic tools by science teachers: the French case*, NR1.2-FR, 1999.

Sassi, Monroy, Testa & Giberti, *Reading and interpreting graphs from real-time experiments: students difficulties, teachers interpretations and class practice*, NR2-IT, 2000.

Sassi, Monroy, Testa, Ametller, Andresen. Balzano, Boohan., Chauvet, Colin, Couso, Giberti, Gutierrez., Hirn-Chaine, Ogborn, Pintó, Quale, Rebmman, Stylianidou, Viennot, *Teacher training materials favouring the take-up of innovations*, RW5, 2000.

Sassi, Ogborn, Pintó, Quale, Viennot, *Guidelines for policy-makers of teacher training programs*, RW7, 2000.

STTIS Project, Internal Report RW0: *Outline and Justification of Research Methodology*, Work Packages WP1, WP2 and WP3, 1998.

Stylianidou, Ogborn, Contini, Gutierrez, Kolst, Ott, Perez, Pinto, Quale, Rebmman, Sassi, Viennot, *The State of Art in the Use and Value of Informatic Tools*, RW1.1, 1999

Stylianidou & Ogborn, *The State of Art in the Use and Value of Informatic Tools. The UK case*, NR1.1-UK, 1999.

Stylianidou & Ogborn, *Teachers using computer modelling and simulation in the science classroom: the English case*, NR1.2-UK, 1999.

Stylianidou & Ogborn, *Teachers' transformations of innovations: the case of teaching Energy in English secondary schools*. NR3-UK, 1999.

Stylianidou, Ogborn, Balzano, Giberti, Gutierrez, Kolst, Monroy, Perez, Pinto, Quale, Rebmman, Sassi, Viennot, *The nature of use by science teachers of informatic tools*, RW1.2., 2000.

Stylianidou, Ormerod & Ogborn, *Difficulties in teaching and learning with pictorial representations*, NR2-UK, 2000.

Viennot, Balzano, Chauvet, Giberti, Gomez, Hirn, Monroy, Ogborn, Pinto, Sassi, Stylianidou, *Investigation on teacher transformations when implementing teaching strategies*, RW3, 1999.

[Back to table of contents](#)

### Research Institutions:

Universitat de Barcelona, ES

Universidad Nacional de Educación a Distancia, ES

Universität des Saarlandes, DE

Foundation for Research and Technology, Hellas, GR

Innovation in Education and Training Ltd., GR

University of Wales-Bangor, UK

Professional and Academic Channel for Europe 2000, BE

University of Oulu, FI

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### Context of the Research

As Europe moves towards a knowledge-based economy and society, social and technological changes are requiring new ways to access knowledge. New information and technology systems are resulting in new ways for flexible education and training.

"Virtual campuses" are emerging. "Virtual learning environments" are being created by organising the learning environment in new ways, based on different technological configurations for learning and communicating between peers and teachers.

However, Europe is in danger of falling behind other economies, especially USA and Japan, as changing demographics, technological developments, and globalisation require individual adaptation and the renewal of educational systems and learning at the workplace. Therefore, universities and other higher education providers need to be more responsive to market forces and provide more flexible approaches to the education and training marketplace.

Technical innovation in education in the form of "virtual learning environments" is one possible solution, which could encourage greater access to cross-cultural education and promote European citizenship. This project established a thematic network to evaluate educational and training innovations in the current implementation of virtual learning environments.

### Key Conclusions

The project reached the following conclusions:

1. Virtual learning environments are fundamentally similar to learning environments which can be defined as:  
  
A place or community arranged specifically for learning purposes and mediated by the intensive use of ICT, and one that is based on ideas of the structure of knowledge and learning, and the practical arrangements necessary for learning connected with time, place and repetitive rituals which together provide the social organisation for learning and teaching.
2. The main components of learning environments that enable learning to take place are:
  - Pedagogical functions - learning activities and materials, tutoring, teaching situations and evaluation.
  - Appropriate Information and Commutation Technologies - suited to a pedagogical model.
  - Social organisation of education - time, place and community.
3. Virtual learning environments tend to be introduced parallel to other forms of study, but this raises concern about their sustainability.
4. Market pressures are more evident than political pressure when implementing virtual learning environments in institutions.
5. Virtual learning environments tend to be initiated by enthusiastic staff.
6. Yet financial priorities, perceptions of the university's role and arrangements for learning and assessment inhibit institutions from totally embracing virtual learning environments.

7. Virtual learning environments make access to more students and client populations possible although some tutors found it hard to monitor learner's satisfaction.
8. However, virtual learning environments could improve the current quality/variety of teaching/learning and reduce the administrative burden on teachers.
9. Virtual learning environments are also considered to be new sources of income or reduce current costs for institutions.
10. Some academics consider virtual learning environments as a way of enhancing their reputation and career potential.
11. Regulations for validating virtual learning environments based learning will be required to guarantee the quality of service delivered.
12. Barriers to the implementation of virtual learning environments include faculty members' resistance to change; funding; lack of adequate facilities and no priority over other users.
13. Europe's telecommunications infrastructure is improving along with the available bandwidth and with the availability of low cost powerful computers and software suites virtual learning environments are technologically and economically accessible.

## **Key Recommendations**

Recommendations include adopting the following approaches to implementing virtual learning environments:

### *Policy recommendations at institutional level*

1. The initiation of virtual learning environments requires a process of the development, circulation and discussion of an initial Green Paper, which is then revised for implementation.
2. Factors to be considered when planning virtual learning environments include information selection and design, communication, organisational management, technological realisation, and didactics.
3. The three key factors underlying any virtual learning environment implementation policies include infrastructure, training and development and organisational culture.
4. However, the implementation of virtual learning environments will not succeed without an equal integrated and coordinated investment in all three of these elements.
5. The change to be brought about by virtual learning environment implementation requires an "organisational development" approach in which resource management, professional development and objective sharing are the key components.
6. Professional development programs and overt institutional support structures must be developed to elevate the status of "research in teaching" and therefore facilitate the diffusion of virtual learning environments innovations.
7. In order to adopt virtual learning environments, institutions can use a number of events and communication systems to consult any of the following stakeholders - professional bodies; staff/student associations; government funding bodies; any bodies associated with the administration of the state or the region that might have an interest in the development of the university and national government and EU policy relating to learning.

### *Teaching/Learning policy recommendations*

The following recommendations require both the teacher and the learner to be set in their academic, social and cultural contexts:

1. Teachers need special training for online-education. Teaching in virtual learning environments needs competence in technological (so-called *hard skills*) and organisational aspects as well as new skills in applying relevant didactical methods, moderating/facilitating, etc. (so-called *soft skills*).
2. Support is needed for the development of "innovation units", (consisting of technical groups, academic departments and teams of teachers) to work towards changing teaching practice.
3. The potential of technological tools must be balanced with an institution's pedagogical model.

4. Learning resources and materials must be specifically designed for virtual learning environments.
5. The division of labour for tutors, lecturers and other staff involved in learning campus operations needs to recognise the difference in virtual learning environments workloads.

#### *Cross-cultural policy recommendations*

The following recommendations are designed to protect cultural minorities and those who prefer to learn through their mother tongue.

1. The use of virtual learning environments needs to be promoted through collaboration at European level and vice versa.
2. The linguistic and/or cultural diversity of EU member states must be considered in the organisation of European education and training programmes in each country and on a trans-European basis.
3. International virtual learning environment activities demonstrate legal and economic problems, and highlight the differences in the learning patrimonies of the audiences. Financial considerations also need to be addressed.

#### **The Final Report and results of this project are available:**

[Full Final report](#), [Abstract](#), [Summary](#), [Partner details](#)

#### **Key Publications**

Barajas M. (coord.), *Virtual Learning Environments in Training and Education: an European View*. UB Press.

Barajas M. (coord.), *La educación mediada por las TIC a principios del siglo XXI*, in Medina & Kwiatkowska (coord.) *Ciencia, Tecnología/Naturaleza, cultura en el siglo XXI*, (Barcelona, Anthropos), 2000.

Barajas & Owen, *Implementing Virtual Learning Environments: Looking for Holistic Approach*, *Journal of International Forum of Educational Technology and Society*, 3-3. 2000. Available at: [http://ifets.gmd.de/periodical/vol\\_3\\_2000/v\\_3\\_2000.html](http://ifets.gmd.de/periodical/vol_3_2000/v_3_2000.html)

Scheuermann, F., *CSCL in Higher Education: Requirements for teaching and learning in International Environments*, in *Proceedings of the ICDE 19th Conference on Open Learning and Distance Education*, (Vienna), 20-24 June 1999.

Scheuermann, F., *Lehren und Lernen in Virtuellen Lernumgebungen* (Teaching and Learning in Virtual Learning Environments), in *Proceedings of Learntec'2000 conference*, (Karlsruhe), 2000.

Scheuermann, F., *Campus 2000: Lernen in neuen Organisationsformen* (*Campus 2000: Learning within new Organisational Structures*) (ed.), *Proceedings of the annual conference of the Society of Media in Sciences (GMW)*, (Innsbruck), 19-21 September 2000, <http://gmw2000.uibk.ac.at/>

[Back to table of contents](#)

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### Context of the Research

Recently, changes have taken place in the way education is governed in Europe. There has been a movement away from governing by rules and directives to governing by goals and results, which has often been in combination with the deregulation and decentralisation of decision-making.

This project has studied the implications of such a transformation in relation to different contexts of educational traditions and to the societal consequences in terms of social inclusion and exclusion. It has explored the implications of these transitions in education governance during the 1990s in Australia, Finland, Germany, Greece, Iceland, Portugal, Spain, Sweden and the UK (England and Scotland).

The project has aimed to explore the rules that organise policy, so that these rules may be reviewed and alternative possibilities explored.

### Key Conclusions

It was identified that educational policy can be changed by strategies involving the management, legislation and the way resources are allocated. The studies showed that such measures were carried out in perceived social contexts of instability and uncertainty in order to create consensus and harmony and to improve economical competitiveness. This presumed harmony and consensus made critical discussions of policy and the search for alternatives less likely in the public spaces of education. Arguments for educational restructuring had a fatalistic emphasis where no alternative options were present. The following conclusions were reached: -

1. The way, in which educational policy is steered, has moved away from traditional centralised control policies to more decentralised policies in which local government has more control over how resources are allocated.
2. Resource steering has involved the transfer of fiscal management to local districts, with changes in the workplace, curriculum and professional relations, contract management, new self-evaluation procedures and laws to modernise the education system. This has also involved addressing the problems of social exclusion.
3. National laws have introduced more explicit programmes for character, moral and civic education to address perceived needs of cultural dislocation and disintegration.
4. Centralisation and decentralisation of educational governance co-exist. At one end there are tighter assessment strategies in teaching, increased attention to quality assurance through measurement of children's and teacher performance, and other accountability measures. At the other end of the spectrum are school 'educational zones,' - just one example of recent policies to decentralize - by developing partnerships between the school, community, the State and business.
5. There are also new governing strategies for the professional development of teachers as well as giving them more professional autonomy through greater involvement of them and local school administrators in school and community decision-making related to the decentralization processes of schools.
6. There is an increase in bureaucracy and administration to monitor the school through increased differentiation in management and the involvement of local and national politicians.

7. The professionalisation strategies have increased work demands on teachers and school administrators and control of their time has increased. But, this has reduced teachers' capacity to work with individual students, as additional resources have not been made available.
8. However, quality assurance through assessment and evaluation is increasingly being determined centrally, thus increasing teachers' participation while reducing teachers' autonomy.
9. However, there appears to be a shift away from teachers addressing social issues to a pedagogical focus on the individual knowledge and attitudes of pupils.
10. Categories that classify individuals and groups by socio-economic status and poverty – thus relating to inclusion in schools appear to have remained the same since the 1960s. But the categories relating to differentiation, marginalisation and exclusion have shifted to include ethnicity, gender and race, including more detailed categories about family and delinquency in order to identify and target educational programmes, such as single parent families and teen-age pregnancy.
11. The cause and effect relationship of both ways of classifying exclusion are being correlated with characteristics of deviance. For example, the problem of marginalisation and exclusion is related to the social problems of lack of discipline in the community, unemployment, and dysfunctional families (single parent, teen-age pregnancy) and educational attainment. Therefore excluded groups are becoming defined through new social categories of deviance that make it less likely for these populations to ever become 'of the average.'
12. These external categories of deviance are then transferred into the school as internal ways of categorising students and it is then assumed that the role of the school is to re-socialise the child and family that are perceived to be deviant and lacking educational success.
13. Categories for statistical analysis are created in a way that helps decisions on how problems are acted upon by relating them to the causes of the problem. However the formulation of the categories, have often been influenced by whatever is the "social policy thinking" at the time.
14. Statistical categories 'make-up kinds of people' as individuals are transformed into calculable and governable groups. The 'kinds of people' targeted have typically been drawn from theories of deviancy, with the groups and individuals designated by social planning for rescue or redemption in the name of progress.
15. Thus, the characteristics of deviant students need to be placed against those that define the 'good' student. That student is one who is flexible, has problem-solving skills, collaborates and perpetually involved in a self-monitoring and active 'lifelong learning.' The quality of child is one that embodies an entrepreneurial logic.
16. It is also recognized that the 'targeted' populations also use the categories to gain greater resource allocation.

## **Key Recommendations**

The following recommendations were made:

1. There is a need to reconsider the significance and underlying categories and distinctions that are used to order and classify who is included and who is excluded in policy and research about policy. The systems of reason are governing mechanisms that not be taken-for-granted as the principles that order the 'problem-solving' of policy and actors are not neutral but constructive and productive of educational practice.
2. There is a need to re-examine what has been generally accepted about social policy as it might be obscuring rather than clarifying the issues that need to be considered. This requires not giving up questions of justice and equity but how the rectification of social problems defines the normal and the deviant.
3. There is a need for more careful consideration of policies relating to decentralisation with those relating to centralisation.
4. While notions of market, individualization, and more efficient local management of educational systems seem to have certain orthodoxy in reforms, policy makers should consider the downside of such reform, such as how new patterns of segregation and exclusion are produced.

## The Final Report and results of this project are available:

[Full Final report](#), [Partner details](#), [Website](#)

### Key Publications

Aro, Rinne & Kivirauma., *Northern Youth under Siege of policy change: Comparing youth's educational opinions in Finland, Swede, Portugal, Spain and Australia*, Scandinavian Journal of Educational Research, no 3, 2002.

Ingólfur Ásgeir Jóhannesson, Sverker Lindblad og Hannu Simola, *An inevitable progress? Educational restructuring in Finland, Iceland and Sweden at the turn of the millennium*, Scandinavian Journal of Educational Research 46(3), 2002.

Ingólfur Ásgeir Jóhannesson, Guðrún Geirsdóttir og Gunnar E. Finnbogason, *Modern educational sagas: Legitimation of ideas and practices in Icelandic education*, Scandinavian Journal of Educational Research 46(3), 2002.

Lindblad & Popkewitz (eds.), *Education governance and social integration and exclusion: National cases of educational systems and recent reforms*, Uppsala reports on education 34, 1999.

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Popkewitz, Lindblad & Strandberg, *Review of research on education governance and social integration and exclusion*, Uppsala Reports on Education 35, 1999.

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Simola, Rinne. & Kivirauma, *Abdication of the education state or just shifting responsibilities? The appearance of a new system of reason in constructing educational governance and social inclusion/exclusion in Finland*, Scandinavian Journal of Educational Research, no 3, 2002.

Special issue, *Scandinavian Journal of Educational Research* (Vol 36, no 2). Results from the EGSIE project with a special focus on the Nordic countries.

[Back to table of contents](#)

**Research Institutions:**

- University College London, UK
- Center for Operations research and econometrics, BE
- Centre de Recherche en Économie et Statistique, FR
- Le Groupement de Recherche en Économie Quantitative d'Aix-Marseille, FR
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This research project has been funded by DG-Research under the *Targeted Socio-Economic Research* (TSER) Programme of FP4

**Context of the Research**

The distribution of skills and wages in the workforce is changing across developed countries with virtually every advanced country experiencing a significant increase in the proportion of employment for skilled workers and a decrease in the share of employment for unskilled workers. Countries like the USA and UK have experienced an increase in wage inequality, whilst other European countries and Japan have not, although their unemployment level has risen, especially amongst the less skilled.

Skilled biased technical change, globalisation and the associated enhanced competition from low wage countries have been competing explanations for these changes, yet far less attention has been paid to the processes affecting the supply of skills. Although skill biased technical change may help explain why all countries have seen a shift in the composition of employment, it cannot explain why, if all countries have been subject to common technological shocks, the change in the pattern of wages has been so varied across different countries.

An analysis of the supply of skills is necessary for a coherent explanation of these observed changes. The project brought together the expertise of a number of European economists from diverse methodological backgrounds to better understand the mechanisms underlying the changing distribution of earnings and processes, driving technical progress and skill accumulation.

**Key Conclusions**

The following conclusions were drawn from the project:

1. Substantial differences in terms of earnings and unemployment patterns of inequality were found across the US, UK, Germany, France, Italy and Greece, suggesting that idiosyncratic features of each country's educational and labour market institutions have had a major effect in shaping the effects of technical progress and increasing the supply of skilled labour.
2. The increased demand for a better-qualified workforce is highly responsive to the existing supply of skills.
3. Such an increase in demand appears to require a number of simultaneous organisational changes that allow firms to exploit the synergies between human capital and new technologies. The intensity of training can also be associated to these types of changes.
4. Most of these changes are found in the service sector and very specific industries within the manufacturing sector.
5. There is strong evidence that organisational change; technology and human capital are complementary assets of the modern enterprise.
6. There are increasing incentives for firms to either train their workers and/or demand an apprenticeship scheme.
7. In addition, firms benefit from hiring apprentices in terms of their pure current productivity, as in France and Germany where apprentices were able to substantially contribute to the productivity of the firm where they were training. This is particularly relevant for small firms.

8. Apprenticeships also have investment value for firms as the trainees learn firm-specific skills and offer privileged information about the trainee's productivity.
9. The decision to stay on in education after the compulsory schooling age is highly influenced by current labour market conditions, particularly unemployment.
10. Also, individuals appear to be responsive to the existing wage premium, which in the case of countries with short higher education courses is a good approximation to their own expected wage premium. This responsiveness is also shaped by the direct cost of additional education i.e. tuition fees and availability of student loans. In this context, the human capital investment incentives model explained UK data.
11. It is convenient to target separately research & development activities that are new to the market (new marketable products) and are new to the firm (implementing new processes).
12. A trade induced skill bias, although thought to have no significant effects, assumes contradictory features of international trade, i.e. most trade involves intermediate products within and not between industries. Evidence from France indicates that although the trade induced skill bias does not completely explain changes in unemployment and earnings, its effect is far from negligible.
13. A decrease in the educational standards required to enter higher education may lead to a higher degree of crowding out in the labour market for less skilled workers. Therefore credit-constrained individuals need targeting first when subsidising access to higher levels of education. Over-education at an individual level can also be consistent with a socially sub-optimal level of educational attainment.
14. The links between research & development/growth, skill/inequality and training within different firms and different economies can be explored using a simple model developed during the project.
15. Unions help wage compression by discouraging independent investment in human capital and encouraging firm-sponsored training. Therefore a period in which economic growth rates accelerate might lead to a reduction in the unionisation rates and thus increase inequality.
16. Minimum wages can lead to an overall improvement in the quality of jobs offered by firms without leading to a significant unemployment increase.
17. Publicly supported apprenticeship schemes can contribute to improved market efficiency. However, the beneficial effect of these policies must be traded off against their opportunity cost and the distortions they might generate in other sectors of the economy.
18. There are numerous possibilities for research that examine recent policy changes and evaluate simultaneously the associated costs and benefits.

## **Key Recommendations**

1. Restrictions on the free flow of information regarding quality of skills and job's productivity, effort, etc. across participants in the labour market can lead to market failures. However, successful government intervention and institution design could lead the economy to the most preferable equilibrium.
2. Education/skills and training at a micro-level results in a more educated person needing less training, but at the macro level policies that generate a higher proportion of educated people can increase the amount of training that takes place by making the economy more innovative and raising the demand for training.
3. Policies targeted directly at raising the rate of return to research and development have the strongest effect on growth, but at the cost of increasing inequality.
4. Policies that lower training costs across the board will have an ambiguous effect on growth and could have a mild positive or negative effect, but seem to have little effect on inequality.

5. Policies that differentially reduce the training costs of the least skilled have little effect on growth and a small effect on reducing inequality.
6. Further research into comparative static predictions is necessary with particular emphasis on the skill composition and training of firm size and research and development, as there are very few robust comparative static predictions.

**The full title of the project is:** *Growth, Inequality and Training.*

**The Final Report and results of this project are available:**

[Full final report](#), [Abstract](#), [Summary](#), [Partner details](#)

[Back to table of contents](#)

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### Context of the Research

The need for a common EU migration policy is connected with the characteristics of a common European market, since the abolition of interior borders results in a dependency of each member state on the immigration policy of the other states. Once a foreigner enters EU-territory, the further migration of this person can no longer be controlled. As a result of free labour and product markets within Europe, individual member countries are unable to follow independent migration policies without potentially harming other members. Therefore, a unified migration policy on the European level may need to be considered. The organisation of such a policy, however, requires knowledge about:

- The type of migrants (family migrants, economic migrants, asylum seekers, high or low skilled migrants) that are attracted by the different countries in the EU as well as the selection process and the determinants of return migration.
- The determinants of a fast assimilation process of both, first- and second-generation migrants into the society and the labour market of the receiving countries in order to minimize the costs of immigration.
- The effects of immigration on the labour market outcomes of natives.

The results of the project offer some important insights to these questions. Many case studies have been produced covering different issues and addressing different population sub-groups or domains of economy in eleven countries (UK, Denmark, France, Germany, Ireland, Sweden, Israel Switzerland, Italy, Portugal and Spain).

### Key Conclusions

The following general conclusions that have a more European dimension were reached:

1. Economic factors are important determinants of the migration decision of individuals. Migration, however, does not always take place if there is a positive wage difference. In the case of strong ethnic networks it can also take place in spite of a negative wage difference.
2. It appears that immigration restrictions will only postpone but not prevent migration.
3. The results concerning return migration were rather mixed. The experience in Denmark indicates that less successful migrants have a higher probability to return to their home country. The results for Ireland indicate, however, that return migrants have higher skills and higher wages than the immobile Irish population.
4. At the time of immigration, migrants are in a disadvantaged situation when compared to similar natives. With time of residence, however, immigrants assimilate to natives. The two most important determinants of fast assimilation identified in all countries are language skills as well as attachment to the labour market in order to accumulate labour market experience. These results indicate that effective integration policies should concentrate in particular on language courses.

5. The welfare dependence of migrants varied for the countries investigated. In Germany the fear of a "race-to-the-bottom" in social standards due to welfare magnet effects of generous social security systems are unfounded. However, this conclusion was not confirmed by the experience in Sweden. Further research in this area seems to be necessary to get a clearer picture.
6. In general, the results of the different country studies indicate that existing problems faced by second-generation migrants are the results of factors that they share with other native children from underprivileged background, such as parents without or with only a few qualifications, large families, and living in a relatively poor neighbourhood. These results suggest that effective policies towards underprivileged families should also be effective for second-generation migrants and that, with the exception of policies stressing the accumulation of language skills, special policies towards second-generation migrations seem not to be necessary. There was some evidence to suggest the need to include third-generation migrants in future research.
7. It was also found that there were no negative labour market effects of immigration on natives and hence confirm the results obtained in other countries such as the US or Canada.
8. In fact, it was considered that if European governments select migrants more according to the needs of their labour markets, social tensions about migration would be moderate and the economic performance of the respective country would be improved, as both political and economic objectives of policy-makers would be met.

Country specific conclusions are detailed below:

1. The Danish team worked, partly in co-operation with the Swedish and the German team, on three sub-projects: -

- Wage and job discrimination against immigrants
- The risk of marginalisation of immigrants and refugees
- Integration, social exclusion or return migration

Their major findings are:

- Assimilation of immigrants into their adopted country is closely related to labour market attachment;
- The huge assimilation gap at entry is gradually closing as experience is accumulated;
- There is no strong evidence of wage discrimination, but there may be discriminatory forces in the employment process;
- Parental capital of second generation immigrants has a strong positive effect on completing a qualified education and on entry in the labour market;
- Growing up in neighbourhoods with high concentration of immigrants is associated with negative labour prospects;
- Changes in the organisational structure of work is considered to be the most probable cause of the increasingly difficult assimilation process for immigrants, both in Denmark and Sweden;
- Return migration differs significantly according to the country of origin and the individual labour market experience.

2. The French team concentrated on three themes:

- Academic success of second generation immigrants;
- Wages, trade and immigration;
- Employment, skill structure and trade.

Major results are:

- Immigrants' children appear to be more successful after secondary education than native children with the same social background and family environment. The more favourable school results of immigrant children are considered to be due to their greater perseverance and the stronger educational aspirations of immigrant families. The educational level of the parents, their social class and the size of their family often seem more influential than being of immigrant origin.
- The import behaviour (nature and origin of goods) of firms has a strong impact on workers wages and more in particular on wages of low-educated foreign-born workers.
- Changes in export activity generate movements in the skill-structure.

3. The German team focused on five topics:
  - Institutional framework of migration to Germany;
  - Assimilation of migrants in Germany;
  - The consequences of immigration for natives;
  - Educational attainment of second-generation immigrants;
  - Labour dynamics, trade and technical progress.

Some policy implications are:

- A migration policy that selects migrants according to their skills is beneficial for the receiving country because skilled migrants assimilate very quickly to the society and economy, reduce the probability of becoming dependent on social benefits, reduce the possibility of negative effects on native employment and reduce social tensions towards migration among the native population;
- Assimilation policies are necessary to achieve fast economic integration and reduce the potential costs of immigration;
- Language skills appear to be of particular importance in the integration process.

4. The Irish team studied the characteristics of former emigrants returning to Ireland. It was found that: -
  - Return migration into Ireland is largely made up of skilled people;
  - Return migrants have additional human capital allowing them to earn a wage premium relative to comparable non-migrants;
  - The skilled inflow into Ireland during the 1990s reduced earnings inequality.
5. The Israeli team worked on three topics:
  - Low wages and working poor in Switzerland;
  - Transferability of human capital investments;
  - The effects of vocational training on the wages of minorities.

Some policy implications are:

- Gender wage differentials stem mainly from discrimination and could be reduced by fighting it;
- Immigrants' human capital is not transferable across countries and hence additional training in the host country seems to be necessary;
- Easterners earn less than westerners because of their lower levels of human capital and should get more education and training to close the wage gap;
- Women and Arabs have less access to prestigious, high-paying occupations and should be addressed with selective policies to reach more wage equality.

6. The Italian team studied:
  - Unemployment and consumption;
  - North-South differences in unemployment experience and its relationship with cross-country diversity in family structures and links;
  - Higher-education dropouts in Italy.

Selective findings are:

- The late labour market entry and emancipation of Italian youth was examined in relation to the limited job insecurity experienced or expected by their fathers: having an unemployed father or having one with a high perceived probability of becoming unemployed increase the child's likelihood of living independently.
- The high university dropout in Italy is related to the high enrolling in university in the absence of job opportunities when leaving high school. The university serves as a "parking lot" for high school graduates waiting for a job.

7. The Portuguese team studied the Portuguese immigration in France and found that:
  - Immigration in France is strongly followed by assimilation;
  - Preliminary results point to the absence of wage discrimination.

8. The Swedish team focused on the following immigration issues, using the Swedish longitudinal immigrant database as its basis:
- Development of employment prospects;
  - Immigrant economic integration into the Swedish labour market;
  - Event history analysis of immigrant careers;
  - Labour market performance of immigrants;
  - Economic marginalisation in Sweden;
  - Effects of structural change on the economic prospects of immigrants;
  - Use of sickness benefits among immigrants;
  - Immigrant mortality;
  - Changing economic environment for immigrants;
  - Investment in education after arrival in Sweden;
  - Return migration;
  - Integration of refugee migrants;
  - Income security among immigrants.
9. The British team worked on self-employment, training and worker/firm heterogeneity, and temporary employment. Some of their results are:
- Firms are willing to expend resources to provide workers with general training;
  - Unemployed are more likely to move than employees;
  - There is under-provision of training in both part-time and full-time sectors; Temporary workers report lower levels of job satisfaction, receive less work-related training, and are less well-paid than people in permanent employment;
  - Previous experience of financial problems is positively associated with the current financial situation and the probability of eviction;
  - Policies to reduce unemployment duration and encourage full-time employment should be targeted towards those aged 25 and over on entering unemployment and on increasing educational levels;
  - Jobs that follow an unemployment spell have a shorter mean duration than other jobs.
  - Job search intensity, direct applications to employers in particular, result in a higher probability of subsequent employment.

## Key Recommendations

The following recommendations were made:

1. A unified migration policy on the European level is required, since individual member countries are unable to follow independent migration policies without potentially harming other members.
2. The results of the project suggest that a migration policy that selects migrants according to their skills is beneficial for the receiving country because of the following reasons:
  - Skilled migrants assimilate very quickly to the society and economy of the receiving country. A fast assimilation in turn reduces the probability that migrants become dependent on social benefits.
  - Immigration of selected workers reduces the possibility of negative effects of immigration on native employment as well as wages and may even create gains in efficiency that also result in positive distributive effects, not only for capital but also for native labour.
  - A selective migration policy meets both political and economic objectives, since it reduces social tensions towards migration among the native population and enhances the economic performance.

Therefore, a potential unified migration policy may consider implementing a policy similar to the point systems used in Canada, Australia, and New Zealand.

3. The results of the research project further suggest that assimilation policies seem to be necessary to achieve a fast economic assimilation of the migrants and to reduce the potential costs of immigration for the receiving country. The studies on the assimilation of first- and second-generation immigrants as well as the determinants of welfare dependence of migrants indicate that language skills are of particular importance.

**The full title of the project is:** *Labour Demand, Education and the Dynamics of Social Exclusion*

**The Final Report and results of this project are available:**

[Full report](#), [Abstract](#), [Summary](#), [Partner details](#)

## Key Publications

The project published two conference volumes, six reports, two books, two journals and two journal special issues, 1998-1989.

The following discussion papers were produced throughout this project:

Abowd, Kramarz & Margolis, *Minimum Wages and Employment in France and the United States*.

Arellano & Bover, *Learning About Migration Decisions from the Migrants: Using Complementary Datasets to Model Intra-Regional Migrations in Spain*.

Åslund, Edin & Fredriksson, *Settlement Policies and the Economic Success of Immigrants*.

Åslund, Edin & Fredriksson, *Ethnic Enclaves and the Economic Success of Immigrants - Evidence from a Natural Experiment*.

Barrett, Fitzgerald & Nolan, *Earnings Inequality, Returns to Education and Immigration into Ireland*.

Barrett & O'Connell, *Is There A Wage Premium for Returning Irish Migrants?*

Bauer & Haisken-DeNew, *Employer Learning And The Returns To Schooling*.

Bauer, Million, Rotte & Zimmermann, *Immigrant Labour and Workplace Safety*.

Bentolila & Ichino, *Unemployment and Consumption: Are Job Losses Less Painful near the Mediterranean?*

Bevelander, P., *Declining Employment Assimilation of Immigrants in Sweden: Observed or Unobserved Characteristics?*

Böheim & Taylor, *Unemployment Duration and Exit States in Britain*.

Booth & Bryan, *The Union Membership Wage Premium Puzzle: Is There A Free-Rider Problem?*

Booth & Zoega, *Is Wage Compression a Necessary Condition for Firm-Financed General Training?*

Booth & Zoega, *Why Do Firms Invest in General Training? 'Good' Firms and 'Bad' Firms as a Source of Monopsony Power*.

Booth, Francesconi & Frank, *Glass Ceilings or Sticky Floors?*

Booth, Rancesconi & Zoega, *Training, Rent-Sharing and Unions*.

Brunello, Lucifora & Winter-Ebmer, *The Wage Expectations of European College Students*.

Card, Kramarz & Lemieux, *Changes in the Relative Structure of Wages and Employment: A Comparison of Canada, France and the United States*.

Crépon & Kramarz, *Employed 40 Hours or Not Employed 39: Lessons from the 1982 Mandatory Reduction of the Workweek*.

Crépon & Kramarz, *Working 40 Hours or Not Working 39: Lessons from the 1981 Mandatory Reduction of Weekly Working Hours*.

Danziger & Neuman, *On the Age at Marriage: Theory and Evidence from Jews and Moslems in Israel*.

Dustmann & Schmidt, *The Wage Performance of Immigrant Women: Full-Time Jobs, Part-Time Jobs and the Role of Selection*.

Dustmann & Preston, *Racial and Economic Factors in Attitudes to Immigration*.

Dustmann & Fabbri, *Language Proficiency and Labour Market Performance of Immigrants in the UK*.

Dustmann & Preston, *Attitudes to Ethnic Minorities, Ethnic Context and Location Decisions*.

Epstein & Weiss, *A Theory of Immigration Amnesties*.

Epstein & Lecker, *Multi-Generation Model of Immigrant Earnings: Theory and Application*.

Epstein, G.S., *Labour Market Interactions Between Legal and Illegal Immigrants*.

Epstein & Nitzan, *The Endogenous Determination of Minimum Wage*.

Epstein & Hillman, *Social Harmony At The Boundaries Of The Welfare State: Immigrants And Social Transfers*.

Euwals, R., *Female Labour Supply, Flexibility Of Working Hours, And Job Mobility*.

Fertig & Schmidt, *First- and Second-Generation Migrants in Germany - What Do We Know and What Do People Think?*

Fersterer & Winter-Ebmer, *Are Austrian Returns to Education Falling Over Time?*

Fiorella Padoa Schioppa Kostoris, *Regional Aspects of Unemployment in Europe and in Italy*.

Fougère, Kramarz & Magnac, *Youth Employment Policies In France*.

Fürnkranz-Prskawetz, Hoem & Neyer, *Third Births in Austria: the Effect of Public Policies, Educational Attainment and Labour-Force Attachment*.

Hansen & Löfström, *Immigrant Assimilation And Welfare Participation: Do Immigrants Assimilate Into Or Out Of Welfare?*

Ichino & Maggi, *Work Environment And Individual Background: Explaining Regional Shirking Differentials In A Large Italian Firm*.

Ichino & Winter-Ebmer, *Lower and Upper Bounds of Returns to Schooling: An Exercise in IV estimation with Different Instruments*.

Ichino & Winter-Ebmer, *The Long-Run Educational Cost of World War II: An Example of Local Average Treatment Effect Estimation*.

Neuman & Ziderman, *Can Vocational Education Improve the Wages of Minorities and Disadvantaged Groups? The Case of Israel*.

Nielsen, Rosholm & Smith, *Hit Twice? Danish Evidence on the Double-Negative Effect on the Wages of Immigrant Women*.

Riphahn, R., *Immigrant Participation in Social Assistance Programs: Evidence from German Guestworkers*.

Stevens, M., *Should Firms be Required to Pay for Vocational Training?*

Taylor, M. P., *Self-Employment and Windfall Gains in Britain: Evidence From Panel Data*.

Verdier & Zenou, *Racial Beliefs, Location And The Causes Of Crime*.

Ward, M., *Gender, Salary and Promotion in the Academic Profession*.

Wasmer & Zenou, *Does Space Affect Search? A Theory of Local Unemployment*.

Zenou, Y., *Urban Unemployment, Agglomeration and Transportation Policies*.

[Back to table of contents](#)

## The Potential of Tele-Guidance for Teacher Training

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Socio-Economic Research (TSER)  
Programme of FP4

### Context of the Research

The use of tele-guidance for teacher training has been shown to significantly contribute to the professional development of student teachers, but the effect on their reflection had not been studied. Through collaborative research this project aimed to identify and develop online tutoring strategies using various technologies within different European cultural contexts.

The project, consisting of partners from Norway, Spain The Netherlands and the UK, developed a coordinated research agenda for future research.

### Key Conclusions

The following conclusions were reached in the four case studies that each of the partners produced:

1. The use of telematics was found to promote the reflective competencies of student teachers.
2. Reliable prototypes for further research were developed during the course of the study.

#### *University of Barcelona*

1. The experimental teacher education programme covered four themes:
  - ✓ The historical art and education relationship.
  - ✓ Psycho pedagogic bases in teaching and learning.
  - ✓ Student-teaching experiences at schools.
  - ✓ Presentation of didactic and curriculum resources.
2. The case study found that networking is useful for monitoring the relationship between what students think and do. It is also a good way to encourage students' reflection on this relationship.

#### *University of Exeter*

3. The research showed evidence that point-to-point video conferencing can promote reflection.
4. The reformulation and re-conception of teaching/learning through telematics influenced discourse in the following ways:
  - ✓ The social presence helped to strengthen relationships and encouraged effective conversations.
  - ✓ The formality of the preparation added structure to the conferences and promoted self-confidence in the users.
  - ✓ The practice and particularly the screen-sharing mode enabled greater focus and supported shared meaning.
  - ✓ The privacy of the activity maintained the intensity of the focus and promoted better preparation from the participants.

### *Norwegian University of Science and Technology (Trondheim)*

1. The curriculum of the teacher education programme covered:
  - ✓ General curriculum theory.
  - ✓ Pedagogical content knowledge.
  - ✓ Teaching practice.
2. The students needed closer supervision than in the other studies because their teaching practise was a greater distance from the University. This also meant that one visit from the tutor was not sufficient and the students totally depended on their mentor.
3. During the teaching practise, tele tutoring enabled greater contact between the student teachers and their university tutor.
4. The positive aspects of the experiment for the student teacher were:
  - ✓ Security – someone to talk to when it is necessary.
  - ✓ Help with personal reflection - encouraged formulation of thought.
  - ✓ Improved ability in didactic reflection – through the writing and partner response.
5. The negative aspects were mainly related to the technical problems.

### *Utrecht University*

1. Supervising the student teachers through computer conferencing was beneficial as it:
  - ✓ Reinforces the effects of supervision meetings.
  - ✓ Monitors the progress of students.
  - ✓ Enables more involvement with the progress of students.
  - ✓ Influence on the development of student teachers' reflection
  - ✓ Enables early detection and greater possibilities to find and examine underlying problems.
  - ✓ Enables the involvement of student teachers with the other students and tutor.
  - ✓ Provides informational and social support between the student teachers.
  - ✓ Stimulates reflection on their teaching experiences.
2. Three main clusters of tutor intervention were discovered during the tele-guidance of student teachers, these covered: -
  - ✓ The creation of a safe atmosphere to stimulate student teachers' reflective processes.
  - ✓ The stimulation of growth for the student teachers.
  - ✓ The amount tutors direct or control the reflections of student teachers.
3. The activities of this project have lead to new plans for collaborative future research that contributes to the challenging developments in teacher training programmes in a digital educational future.

### **Key Recommendations**

The study made the following recommendations in four main areas of study:

1. Consideration must be given to other theoretical frameworks, which either adopt holistic and non-linear approaches to learning or cover a more extensive number of attributes.
2. Future research is urgently required that provides evidence of:
  - ✓ The advantages and disadvantages of telecommunication in teachers' education with reference to:
    - ✓ - The influence of telematics on reflective skills.
    - ✓ - Changes caused by telematics on the curricula of teacher training.
    - ✓ - The dramatic changes to the curriculum and the teaching /learning environment.
  - ✓ Student's behaviour in classrooms, particularly the effect on day-to-day classroom practices.
  - ✓ The role of tele-guidance in lifelong learning and the extent to which tele-guidance can encourage learning at work and in other learning settings.
  - ✓ Changes in the tutors' role, the new skills needed and ways of stimulating the professionalisation of tutors.

*University of Barcelona*

3. Further research is required into the importance of the interactive process developed by exchanging messages between each student, the supervisor and the other participants i.e. tutor, other students.

*University of Exeter*

4. The complexities in the nature and oral accounts of the video conferencing activity must be supported by more comprehensive data.

*Utrecht University*

5. The instrument used to measure the reflective behaviours of the student teachers in this study was based on the ALACT-model, which delivered promising results but needs further development and testing.
6. There is also a need to develop an instrument to measure the content and nature of reflection.

**The results of this project are available:**

[Report – University of Exeter](#), [Report - Utrecht University](#), [Partner details](#)

[Back to table of contents](#)



## **Educational research supported by DG-Research under the Fifth EU Framework Programme**

In the Fifth EU Framework Programme (FP5, 1999-2002), research in the social sciences was supported under the Key Action "Improving the Socio-Economic Knowledge Base", one of the 23 Key Actions of FP5.

The Key Action funded more than 170 research projects and thematic networks in the social sciences, 20 of them directly addressing issues of learning and learning institutions.

There were three different Calls for Proposals during the lifetime of the Key Action "Improving". The projects funded as a result of the Third Call started in late 2002 and are expected to finish in early 2006.



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This research project has been funded by DG-Research under the Key Action “Improving the Socio-Economic Knowledge Base” of FP5

**Context of the Research**

Across Europe, there is clear evidence of declining engagement in traditional democratic processes, with governments, companies and other organisations considered to be remote, and insufficiently accountable to their stakeholders. Yet, it is also widely believed that globalisation calls for new, and more devolved kinds of political and social structure, in which individual citizens will play a more active part.

This suggests that people need to be re-engaged as “active citizens”, and enabled to take informed decisions about their lives, communities and workplaces. However, many people are both disengaged and lack the skills, knowledge or understanding to do so. This is particularly true for people with little formal education and most at risk of social exclusion on other grounds.

Governments have sought to address the issue through citizenship education programmes within formal schooling, but this can only have an impact in the long term and the benefits have yet to be demonstrated. Little research has been conducted about how individuals learn to become such active citizens, the role of formal schooling in this, and the potential role of lifelong learning including less formal mode of learning.

The project has explored the nature of citizenship in six contrasting European countries (UK, Belgium, Finland, Netherlands, Slovenia, Spain). It has investigated how people have learned to be active citizens and what kinds of education and training exist to support this.

The project considered “active citizenship” as the active engagement in collective activity in one of four areas or “domains” - the state/formal politics, the workplace, civil society and the private domain.

**Key Conclusions**

The following key conclusions were reached:

1. Decision-making is being increasingly devolved in organisations of all kinds. This is because there is a belief that large centralised systems are increasingly difficult to manage and plan. There is also a need to ensure democratic legitimacy for decisions and actions.
2. In several countries there was evidence of government trying to re-engage its citizens in these processes.
3. There is no simple standard model of what an active citizen is, nor any single process for developing citizenship. The sense of citizenship is embedded in each individual’s unique life history and formed through relationships with others (individually and in groups).
4. Active citizens have a strong sense of their place and responsibility in the world and are driven by a sense of commitment to other people, rooted in notions of justice and care.
5. The reasons for becoming an active citizen are formed early in life through the family and the community, at least as much as, or even more than, in school.
6. National differences in individuals’ understanding of citizenship appear to mirror the differing historical experiences of citizenship and democratic politics in countries.

7. Despite notable changes in the operation of formal democracy and in social structures over the last half-century, no significant differences were found between active citizens born in the 1930s and 1940s and those born a generation later. This may mean that change has been overstated or that the factors which make individuals active citizens remain constant, but apply to different, or fewer people.
8. Active citizens engage with the state when they wish to do so and on their own terms. They are driven by personal ethical values and many are resistant to the competitive cultures of traditional political processes and parties.
9. Active citizens usually learn their citizenship skills through trying to solve a problem or to fulfil a mission, rather than by setting out to “learn to be good citizens”. Learning, and citizenship emerge as a consequence of this primary motivation. Learning therefore has to be embedded in those processes.
10. Therefore, learning citizenship is unlike many more formal kinds of learning. It is interactive and deeply embedded in specific contexts.
11. The outcomes of citizenship learning are unpredictable, and public interventions are most likely to be effective if they provide individuals with opportunities to explore and acquire the skills in context, rather than through formal instruction.
12. The skills and knowledge that active citizens develop in one area (political, work, civil society or private) are frequently transferred into the other areas.
13. Active citizens are notably energetic people and typically are active in several spheres.
14. Lifelong learning has become a major focus of policy attention for governments, private sector organisations and social movements, but the learning of citizenship in the area of civil society is still usually under-resourced by comparison with the workplace.
15. Whilst non-governmental organisations (NGOs) have succeeded in stimulating significant learning in civil society, its importance is still generally underestimated by governments.
16. As a result, work to develop citizenship skills in civil society tends to be short term, less systematic and less sustainable. Those who suffer most from this are those who are already most vulnerable to social exclusion and least likely to become active citizens in any context.
17. Gender is a significant factor in determining how and where people engage as citizens, conditioned particularly by expectations of gender roles (which vary between the countries), by social and political structures, and by the low value typically placed on citizenship in the private domain. This is unfortunate since the home and early upbringing (typically dominated by women) are critical in creating the predisposition to be active citizens.
18. Other important areas of difference, including ethnicity, disability and sexuality, interact with gender to create complex patterns of inclusion and exclusion. In addressing this it is important to ensure that educational interventions seek to give individuals the ability to analyse critically how institutions and cultures differentially affect individuals. They also need to use group solidarity as a basis for empowering those least inclined to put themselves forward.
19. Active citizens appear in general to be more highly educated than their peers. There is therefore a danger that citizenship becomes yet another area of exclusion for those who have previously been less successful in education, and who are already more prone to exclusion. However, those who become active despite low levels of initial education often re-engage with formal education as a result.
20. Formal education in citizenship seems to have played little part in the formation of individuals. However, extra-curricular activity during formal education does appear to be important, as do structures which give students a voice in the running of their educational institutions.

## **Key Recommendations**

1. Governments and other organisations should create opportunities for individuals to learn citizenship skills through practice and participation in activities relevant to them across a range of contexts, and by supporting the development of learning resources. Such learning is likely to foster transferable citizenship skills from one area to another and could create disproportionate benefits.
2. Governments, political parties, employers and trades unions should seek to develop more inclusive approaches to engagement in the political and workplace domains so that they appear less hostile and more supportive. This could be aided by adopting a “learning organisation” approach and by encouraging the development of mentoring to help the less confident to develop relevant skills. Trades unions often play an important role in

assisting less advantaged individuals to be active citizens in the workplace; this should be recognised and supported.

3. Governments and civil society organisations should provide more non-formal training for citizens involved in voluntary organisations. This is a route through which many people find their way back into the formal education system after previous failure.
4. Governments should support embryonic civil society organisations. The formation and early growth of such organisations provide important learning opportunities for individuals and groups, and are more effective when modest amounts of external expertise and support are provided.
5. Organisations funding informal learning in civil society organisations need to recognise the ‘process’ character of citizenship learning, and develop funding regimes in which civil society organisations are more long-term and equal partners.
6. Governments and education providers (formal, non-formal and informal) should support the development of citizenship skills in home and private life, which may produce significant long-term benefits. Parents and others involved with the primary caring role for young children should be supported to recognise and develop their roles in forming citizens. Parent, family and women’s education are particularly relevant.
7. The EU and national governments should continue to encourage international exchanges for people of all ages, as they enable individuals and groups to see alternative perspectives and develop their ability to think laterally and be constructively critical of the status quo.
8. As citizenship skills appear to be developed more through extra-curricular activities than through the formal curriculum, schools and governments should encourage such activities. Effort is required to ensure they are equally accessible to all, as extra-curricular opportunities are often disproportionately taken up by students from higher social classes.
9. There should be encouragement of initiatives that involve young people in the governance of their own educational and other institutions, as this is likely to be particularly helpful in creating a sense of engagement.
10. As there is a serious lack of research into the processes of informal citizenship learning within the workplace and civil society, funding organisations should support further research into the informal development of citizenship skills and knowledge.

#### **Full title of the project:**

*Education and Training for Active Governance and Citizenship in Europe: analysis of adult learning & design of formal, non-formal & informal educational intervention strategies.*

#### **The Final Report and results of this project are available:**

[Final Report](#) [State of Art Report](#) [Partner details](#)

The project web site at <http://www.surrey.ac.uk/Education/ETGACE/>

#### **Key Publications**

The main publications of the project itself are four reports to the European Commission:

*Citizenship and Governance Education in Europe: A Critical Review of the Literature:* vi + 205 pages; November 2000.

*Focus Groups: Intervention Strategies for Citizenship and Governance Education:* 220 pages; November 2001.

*Learning Citizenship and Governance in Europe: Analysis of Life Histories:* ix + 268 pages; May 2001.

*Learning Active Citizenship and Governance in Late Modern Society. A European Perspective:* viii + 173 pages; September 2002. (A revised version will eventually be published as a book).

[Back to table of contents](#)

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“Improving the Socio-Economic  
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**Context of the Research**

Increasingly, the European workforce needs to become more flexible in order to meet the demands of an aging population in some regions, and for the continuous changes in skills requirements. Traditionally, men dominate some types of work and women dominate others. This, in itself is tending to reduce workforce flexibility and create skills shortages that might be reduced, if gender was not considered a barrier to entry. In addition, gender can also impede both individual career options of women and men and has implications for human resource development. As well as addressing equal opportunities issues, vocational education and training systems need to aim to provide the skills for the workforce that enables both sexes to have the competences that don't restrict individuals according to their gender.

This project investigated the impact of gender segregation of European labour markets on vocational education and training, with specific consideration to key or core competencies and qualifications. The project addressed differences between women and men in terms of the further development of gender specific key competencies or in terms of their existing sets of key competencies in situations of occupational change.

Research was carried out in various European countries each representing a particular cultural and societal context - the United Kingdom for a market-oriented society; Germany - the strongly structured labour market in central Europe; Portugal - the strong modernisation of southern European countries; Greece - a society that still values highly traditional characteristics and Finland - representing the Nordic welfare state.

The project identified how both sexes could be supported in acquiring key competences, normally associated with the opposite gender, during initial and continuing vocational education and training throughout working life. This enables individuals to follow occupational pathways that best suits them, thus strengthening their individual autonomy. This also has the potential impact of enhancing the quality of existing human resources, which is good for the economy and society as a whole

**Key Conclusions**

1. In spite of the different industrialisation and societal developments the differences between countries was much smaller than expected.
2. In particular, the positive action of the Nordic welfare state does not lead to significantly different results, compared to southern Europe.
3. Nor did the existence of a market-oriented economy or a strongly regulated labour market and vocational and educational system, show a significant difference, to influence the outcomes to a remarkable degree.
4. Viewed from different perspectives a model of key competences related to gender differences was developed:
  - Societal perspective: societal influences, taking into account also possibilities to counteract them;
  - Occupational perspective: improving opportunities for gainful employment in view of conditions of the current labour market;
  - Activity related perspective: managing complex and often multiple requirements, time-management, decision-making;
  - Subjective perspective: cognitive and emotional striving for self-actualisation and happiness.

5. It appears to be advisable to further mutual learning of boys and girls in order to broaden the scope of their key competences, perhaps also in mixed courses which encompass both, male and female dominated occupations.
6. Most features of “gendered key competences” expose a very large area of overlapping between the two sexes.
7. Women and men often have rather different predominant expectations with regard to their self-actualisation in their future occupational life.
8. Gender segregation in the labour market has not been considerably reduced during the last decades, as far as “typical” male and female occupations – like electricians and nursery nurses – are concerned.
9. Most people seem to be quite happy with the state of affairs. One may attribute this attitude in part to a “gender blindness” or “gender tiredness” in view of the many proactive programmes recently.
10. Valuable insights were gained from considering “exceptional” cases i.e. men working or being trained as nursery nurses and women in the occupational field of electricians:
  - Most “exceptional” young people had developed non-typical interests during their childhood - particularly self-competences.
  - These were further developed during their training as female electricians and male nursery nurses.
  - They were also sometimes treated differently as compared to their counterparts from the opposite sex.
  - Trainers thought that female electrician trainees are tidier and more industrious than men, but they also sometimes thought them to be not so keen with respect to logical thinking and technological creativity. However, female trainees feel they were accepted.
  - Exceptional people felt that they had to overcome rather strong reservations and sometimes prejudices on the part of employers and colleagues, but also of family and friends.
11. A lot of young people leave an atypical training at an early stage because they find learning and working environments insupportable, through a mixture of attitudes and conditions encountered. However those people, who succeed appear to be more conscious about their occupational choice and thus sometimes more engaged. That is, they make use of their additional key competences, especially regarding their personal development, and that this enhances their occupational career, showing they have “gender autonomy”.
12. Dealing with occupational change depends very strongly on the motivation for that. This can be more due to external circumstances, like being laid off or removal due to marriage, necessity to re-enter the labour market after a family phase (for our sample: only women) or adapting work conditions to support elderly parents. On the other hand, inner motivation can arise from the wish to improve one’s work situation, either looking for work which is better paid or which is more intrinsically rewarding and creative.

## **Key Recommendations**

1. The main efforts should be focused towards encouraging “gender autonomy” in vocational education and training and continuous vocational training rather than trying to equalise the numbers of people from either sex in each occupation.
2. Activities to strengthen and support gender autonomy should be through developing the “self competences” that create individual autonomy. With regard to occupational life the ability to pursue individual autonomy is sometimes called “competence to ‘shape’ one’s own occupational biography”.
3. Everyone regardless of gender should be given the opportunity to shape one’s career path according to individual preferences, as far as possible.
4. To further gender autonomy individuals should:
  - Be encouraged to further develop relevant key competences, particularly self competences connected to self-assurance, that is
  - To try to become aware of one’s own key competences beyond usual prejudices.
  - To call in question the conventional perceptions of what is a male or female occupation.
  - To dare to make “atypical” occupational choices.
  - To develop perseverance in order not to give up at an early stage of an atypical career.

5. Vocational education and training systems and recruitment practices need to focus more on providing encouragement for all people, instead of reinforcing barriers, e.g. through recruitment practices according to gender stereotypes.
6. It is particularly important to support people of either gender who intend or have decided to choose an occupation that is atypical for their sex.
7. In vocational education and training including training in companies this means having to:
  - Counteract gender blindness and gender tiredness, as this is a major barrier for the “exceptional cases”.
  - Provide opportunities to work in gender-mixed classes,
  - Provide mentoring by people who have themselves made an atypical choice,
  - Be aware of prejudices regarding gender-“typical” key competences.
8. Teachers, trainers and personnel managers, through continuous professional development need to be made more aware of how to support and encourage gender autonomy.
9. In addition, wages need to be set according to gender equity. There is also a need for provision of childcare and appropriate parental leave.

**Full title of the project:**

*Gender and Qualification - Transcending gendered features of key qualifications for improving options for career choice and enhancing human resource potential.*

**The Final Report and results of this project are available:**

[State of Art report](#), [Full report](#), [Abstract](#), [Summary](#) [Partner details](#)

The project web site at: [http://www.biat.uni-flensburg.de/biat.www/projekte/genderqual/genderqual\\_eng.HTM](http://www.biat.uni-flensburg.de/biat.www/projekte/genderqual/genderqual_eng.HTM)

**Key Publications**

Evans, K., Hodkinson, P. & Unwin, L. (eds.), *Working to Learn*, London, Kogan-Page, 2002.

Figueira, E. (ed.), “Género e Qualificação. A questão das competências- chave associadas ao género na escolha da carreira profissional” in *Economia e Sociologia*. Évora: Estudos Superiores de Évora, 2002.

Heikkinen, A., “Turha, ärsyttävä ja arka aihe”, *Journal Aikuiskasvatus*, 4/2001.

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Heikkinen, A., “Gender and the transforming adult education theory and practice”, in Dybbroe, B., Ollagnier, E. (eds.), *Gender and adult education*, University of Roskilde, 2002.

Heikkinen, A. et al. (forthcoming): *Ammattikasvatuksen femininiteetit ja maskuliniteetit muutoksessa*.

Kampmeier, A.S., 1<sup>st</sup> Common Report, Part 1: Gendered key qualifications – employment practices and self images. Part 2: Effects of career choice against common gender structures on the development of key qualifications, University of Flensburg, 1/2002.

Kampmeier, A.S., 2<sup>nd</sup> Common Report: Career Changes and Gender, University of Flensburg, 2/2002.

Kampmeier, A.S. & Wigger, A., 3<sup>rd</sup> Common Report: Recommendations for transcending gender barriers in the European VET system, University of Flensburg, 7/2002.

Kampmeier, A. S. (ed.), *Gender and Qualification*, Final Report, University of Flensburg, 2003.

[Back to table of contents](#)

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This research project has been funded by DG-Research under the Key Action “Improving the Socio-Economic Knowledge Base” of FP5

**Context of the Research**

The expansion of the European Union increases the opportunities for people to move freely between Member States, including temporary workers and nomadic communities like Gypsies. However, this raises many issues for static communities with their infrastructures and facilities concerning how best to cope with the needs of such nomadic communities who are often difficult to contact and whose movements may be difficult to predict. One issue concerns the schooling of Gypsy/Roma children.

The goal of the project has been to provide the diverse European management boards with an updated analysis of the situation of the schooling of Gypsy/Roma children. The project has focused on developments in Spain, France and Italy.

**Key Conclusions**

Generally, it has been observed that education systems studied are not capable of dealing with the schooling of the Gypsy/Roma children in a positive way. Indicators for this include the high percentage of absenteeism and dropping out of students who are also failing to gain school results.

The way Gypsy/Roma children are educated across Europe is dependent upon political, socio-cultural, institutional and ideological factors so the following more specific conclusions have been grouped in this way:

**Political Factors**

1. Some policies do not even consider how Gypsy/Roma children are incorporated within the education system and most are not designed to ensure the successful inclusion of Gypsy/Roma children within their education systems due to lack of:
  - Materials and human resources
  - Coordinated guidelines developed at both regional and local levels for dealing with Gypsy/Roma children

**Socio-economic factors**

2. The socio-economic situation of Gypsy/Roma groups is characterised as being precarious and economically unstable. This factor creates negative relations between Gypsy/Roma children and the school.
3. The lack of infrastructure, like areas for the parking of caravans, available to the Gypsy/Roma people, with an itinerant way of life, can also contribute to seriously damaging their relations with the school.
4. Although European legislation guarantees the right to movement for all citizens, in fact, these rights are sometimes restricted due to coercive practices and also due to the absence of the required infrastructures that would allow this right.
5. In fact, racism and social exclusion activates informal bureaucratic practices that prevent Gypsy/Roma families from practicing their right to choose, freely, the education centres for their sons and daughters.

## Ideological Factors

6. The dynamics of the education systems are based on an ideological model that ensures the perpetuation, reproduction and conservation of the social and cultural systems of the majority and/or most powerful groups.
7. Thus, this negative image of Gypsy/Roma - with a lot of racist prejudices, stereotypes and negative images - tends to continue within schools.
8. The ideology of the school, both in its practices and its discourses, perpetuates myths and beliefs that foster the exclusion and marginalisation of the Gypsy children. The education systems transmit, either in a formal or an informal way, values and worldviews that have a hierarchical cultural orientation that is characteristic of the class structure of the majority society.
9. Gypsy/Roma children suffer processes of segregation in the educative systems, both in the classrooms and in particular school centres. These processes of segregation that are explained by diverse arguments, such as the academic gap and/or the need of socio-educational “adaptation”.
10. The ideology about the Gypsy/Roma children is created around the stigma of Gypsy students as “misfit” and “disabled”, associated to psychic deficiency, together with the “ethnic determinism” that considers that the failure at school of Gypsy/Roma children is due to their cultural identity.
11. The negative social representations regarding Gypsy/Roma students, the absence of expectations about school success for those students, and the malfunction of the socio-pedagogic dynamics that are established in classrooms, have a very negative influence over the educational interaction of the Gypsy/Roma children in the groups of teachers.

## Institutional factors

12. There are gaps in the training of teachers who are involved in teaching Gypsy/Roma children. Bureaucratic and practical factors also limit their ability to provide flexible approaches to learning.
13. Gypsy/Roma students have also been portrayed as being disabled or misfit even amongst teachers who “specialised” in teaching them.
14. There is also a lack of multidisciplinary research in this field at universities.
15. At all socio-economic levels the relations between Gypsy/Roma families and the school are hindered by the negative social representation of their ethnicity. This prejudice often prevents positive bonds between Gypsy/Roma families and teachers that also obstruct communication between them. This lack of communication increases due to the ideological, socio-economic and institutional factors already mentioned.
16. In most of the contexts studied, the channels of communication between the families and the teachers are almost non-existent.

## Cultural and symbolic factors

17. Often, the Gypsy culture is associated to exoticism - enhancing some kind of “difference”. This has led to the believe that some sort of specific structures are necessary - with specific classes, specific teachers, specific mediators - all of which are in fact ineffective and unproductive strategies. Thus, ethnicity turns into a sinister wall that separates them from the “normal” and leads to stigmatisation.
18. This paradox arrives because Gypsy/Roma culture with its language and literature, history, and all the other positive and enriching references tends to remain invisible.

## **Key Recommendations**

### *Political and legal.*

There is a need to:

1. Guarantee the protection of the fundamental rights of the Gypsy/Roma children in line with legislation in force, especially their right to effective education.
2. Fully develop State and European legislation regarding the educational and cultural aspects of ethnic minorities.
3. Enhance and help the development of a transnational, integrated, flexible and jointly coordinated approach to social and educational policies.
4. Promote educational policies addressing the itinerant groups of the European Union and for creating infrastructures that allow the inclusion of the Gypsy/Roma children within ordinary schools, thus assuring their right to education.
5. Promote educational policies addressing the migrant population coming from Eastern Europe, guaranteeing the socio-educational integration and the fundamental rights of these children especially the disadvantaged.
6. Give priority to the transnational coordination of educational policies so that they could pay especial attention to itinerant Gypsy/Roma groups, agricultural temporary workers and fair-goers.
7. Articulate and implement the coordination between the local, regional and state administration of each country in order to tackle effective socio-educational policies.
8. Design socio-educational and cultural policies in the European Union that are directed to the acknowledgement of the Gypsy/Roma culture in the school.
9. Promote educational policies in the European Union that are directed to the acknowledgement of the Gypsy/Roma language and its inclusion in the teaching programmes at all levels of the education system.
10. Enhance the inclusion of Gypsy/Roma people at all socio-educational levels of management and democratic participation – the State and local administrations, public and private institutions and non-governmental organisations.
11. Implement educational policies that take into account the principle of positive discrimination regarding: assistance and scholarships to study, school resources, and catering services at school and the nursery.

### *Socio-economic*

There is a need to:

12. Implement coordinated, coherent and effective social politics from local, state and international administrations. The socio-economic inclusion of the Gypsy/Roma groups of children requires coordinated and complementary actions in the diverse spheres being involved.
13. Articulate socio-educational policies that guarantee the most disadvantaged Gypsy/Roma groups of children the access to housing, medical assistance and education.
14. Promote urban and social politics that avoid the processes of urban concentration and segregation, especially regarding the re-housing of social accommodation and the infrastructure of the areas for the parking of caravans.
15. Implement socio-labour policies that foster the labour regularisation of the Gypsy/Roma groups in general and those of migrants in particular, in order to guarantee the schooling of the Gypsy/Roma children of these groups.

### *Institutional*

There is a need to:

16. *Consolidate socio-pedagogical actions aimed at the improvement of inter-ethnic relations in educational contexts, fighting with prejudices, stereotypes and negative social representations of Gypsy/Roma.*
17. Guide the training offered to teachers, towards an ideological reformulation of the system itself, from a critical and constructive perspective regarding educational processes.
18. Guarantee the interdisciplinary training of teachers, orientated towards the ideological de-construction in order to activate the renovation and positive transformation of the educational systems.
19. Foster the democracy and the participation in the educative communities, guaranteeing the participation of Gypsy/Roma families.
20. Articulate pedagogic strategies and educational curricula aimed at fighting ethnic prejudice and negative social representations regarding Gypsy/Roma children.
21. Eradicate educational segregation, determined by formal and informal processes, of the Gypsy/Roma students in classrooms and schools, promoting inter-ethnic co-existence.
22. Help the inclusion of Gypsy/Roma students in ordinary centres and classes, thus avoiding exclusion and segregation.
23. Articulate educational policies that foster the decrease in the teacher/student ratios (1/10) with disadvantaged Gypsy/Roma students.
24. Foster models of cooperative education that help the inter-ethnic co-existence and that decrease prejudice and segregation of Gypsy/Roma students.
25. Implement educational policies aimed at the interdisciplinary university training of teachers and the enlargement of the curricula dealing with Gypsy/Roma issues.
26. Foster interdisciplinary and transnational networks that promote the training and dissemination of good teaching practices.
27. Support and encourage teachers, through continuous training, to develop appropriate interdisciplinary learning resources and enable them to develop flexible schedules.
28. Encourage the spread of good practice to all teachers in order to avoid the creation of “specific” groups of teachers for Gypsy/Roma students.
29. Foster flexible democracy in the educational communities in order to promote the participation and leadership of the families of Gypsy/Roma students.
30. Guarantee the right to the free choice of a school centre for all the Gypsy/Roma community and particularly to the most disadvantaged groups in socio-economic terms, in order to avoid concentration or exclusion.
31. Guarantee the inclusion of the Gypsy/Roma culture in the school curricula.
32. Implement the use of new technologies in educational centres with the aim of facilitating the tracking of the itinerant Gypsy/Roma students.
33. Create a transnational institutional portal (ROMA-NET) in order to facilitate the coordination of the educational policies in the countries of the European Union, regarding the education of the Gypsy/Roma children.

## Further information

The final report of the project was completed in May 2003.

The project web site at: <http://www.opre.roma.uji.es>

## Key Publications

Most of the project reports are available from the project website. The Spanish reports are freely available upon request.

### Italy

Barontini, M., *I roma Xoraxané di Pisa: educazione, musica, contesti*.

Lelli, S., *Pragmatiche in una relazione educativa interculturale. Ricerca micro-etnografica a taglio prevalentemente sociolinguistico in una classe pluriculturale con alunni rom di un plesso scolastico di Firenze*, 2002.

Monasta, L., *Mappatura degli insediamenti di cittadini non italiani di etnia Rom sul territorio nazionale*, Università degli Studi di Firenze, 2002.

Pontrandolfo, S., *Io questi cinque anni di scuola lo strascorsi tutti bene e tutti felice. I rom e la scuola di Melfi*, Università degli Studi di Firenze (2002).

Sidoti, P. S., *Pratiche d'erranza quotidiana in una comunità di Caminanti siciliani*, 2003.

Sorani, A. V., *Gli insegnanti degli alunni rom e sinti. Un'analisi quantitativa*, 2002.

Tauber, E., *Men Ham Sinti - Men ham ker gage!. About Sinti, Childhood and the others*, 2003.

Trevisan, P., *Sinti in Emilia*, 2002.

### France

Bruggeman, D., Repair V., *L'enseignement a distance pour les enfants du voyages*, 2002.

Bruggeman, D., *Les Antennes Scolaires Mobiles de Lille*, 2002.

Centre de Recherches Tsiganes. *La scolarisation des enfants tsiganes. La situation de la France*, 2003.

Faure, P., *Quelques aspects de la question scolaire en milieu gitan, Montpellier*, 2002.

Kirilova, D., Tare M., *Les roms de la région Parisienne*, 2002.

### Spain

Berta Chulvi, *Comunidades invisibles. Los húngaros en España*, 2002.

EINA Equipo de Investigaciones aplicadas, *Prospección sobre la escolarización de la infancia gitana/romni en 167 poblaciones de Andalucía*, 2003.

García Pastor, B., *La educación de la infancia gitana/romni en la ciudad de Valencia. Del barrio a la escuela*, 2002.

Marcos, C., *Gitanos en la ciudad de Sevilla*, 2002.

Martínez, Mariví, Alfredo Alfageme, *La escolarización de la infancia gitana en cifras*, 2002.

Sama Acedo, S., *Espacios vividos, espacios creados. Los gitanos/roma de Évora*, 2002.

[Back to table of contents](#)

**Research Institutions:**

Hoger Instituut voor de Arbeid (HIVA), Catholic University of Leuven, Belgium

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Multimedia Communication Laboratory, University of Siena, Italy

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This research project has been funded by DG-Research under the Key Action "Improving the Socio-Economic Knowledge Base" of FP5

**Context of the Research**

Terms like "learning company" or "learning organisation" are now often used to describe a "new quality of learning" within companies. However, there is a lack of clarification as to what companies really do when they declare themselves as "learning companies". The term "learning company" is also used in very different ways. It can be identified with teamwork, in-company training and the adaptation of the company to changing market requirements. In Germany, both terms have been criticised as an attempt to separate the learning process from the individual.

This project has aimed to identify ways of organisational learning in European companies and its implications for vocational education and training. It has focused on the chemical industry particularly in Belgium, Germany, Italy and the United Kingdom. Organisational learning is defined as happening when "an organisation stimulates individual learning in order to share learning processes between individuals and to distribute the results of such learning within the organisation".

**Initial Key Conclusions**

The following initial conclusions have been reached:

1. Although impressive examples of organisational learning were identified, they were not always a result of a company's general policy.
2. It is only in the UK that organisational learning can be regarded as systematically implemented by company management. In other cases organisational learning was a result of efforts at a decentralized level or as a side effect of the restructuring of work systems.
3. Worker specific knowledge is now being used to improve company performance as well as health and safety at work. Formerly, improvements of performance and safety were almost exclusively a task for engineers and managers. Now, workers at all company levels are being asked to share and utilise their specific knowledge about production processes, technical installations and co-workers in order to improve normal production flow and how to cope with incidents.
4. This merging of theoretical knowledge with practical know-how is regarded as work process knowledge, which operates within a broader horizon than just a single workplace.
5. The stimulation of the development and acquisition of work process knowledge involves evaluation of that knowledge, documenting it and distributing it within the organisation.
6. This has implications for vocational education and training when it is not linked with the acquisition of work process knowledge and is resulting in changes in vocational education.
7. In countries where education and training is merely behaviour-oriented, theoretical elements are added to provide a sound foundation for the acquisition of work process knowledge. Where education and training is mainly theoretical, practical elements of learning are integrated into vocational training.

8. Learning in a “learning company” is oriented towards the running of the plant and towards improving performance, combined to some extent with career opportunities. It is not oriented towards job descriptions and the range of vocational competences that are defined like the German “Beruf” concept. Job descriptions and “Berufe” are not suspended in a learning company, but interpreted less strictly.
9. Vocational education and training as a means to prepare somebody for given work routines is losing its importance and becoming less specialised as a large number of competences are and will continue to be acquired through learning at work.
10. Companies do benefit from organisational learning by gaining greater flexibility.
11. Individuals gain from improved working conditions and making work more interesting especially through knowledge creation and sharing, through utilising more discretion and dialogue and through greater autonomy. There is also the opportunity to attain a higher salary in some cases.
12. Organisational learning does provide multiple opportunities for learning that are appreciated by a large majority of employees. However, these benefits only exist as long as those employees stay with their company.
13. An unsolved problem is the accreditation and validation on external labour market of skills acquired within organisational learning.

### **Key Recommendations**

Initial recommendations include:

1. Programmes and qualifications in initial vocational educational training and in further or continuing vocational educational training should be related to work. The concept of work process knowledge serves as a sound framework for this purpose.
2. As participative ways of organisational learning lead to superior results, workers should be involved in stimulating this process.
3. There is a need to find ways for accrediting skills acquired in organisational learning so that this can benefit the individual on the external labour market.

### **Full title of the project:**

*Ways of Organisational Learning in the Chemical Industry and their Impact on Vocational Education and Training.*

**The project web site:** <http://www.itb.uni-bremen.de/projekte/orglearn/orglearn.htm>

### **Key Publications**

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Fischer, M., Boreham, N.C., Brink, B. (eds.), *Work Process Knowledge and Work-related Learning in Europe*, To be published by Cedefop – the European Centre for the Development of Vocational Training, Thessaloniki, 2003.

Fischer, M., “Organisationales Lernen: Ergebnisse eines europäischen Forschungsprojekts” in Fasshauer, U., Ziehm, S. (eds.), *Berufliche Bildung in der Wissensgesellschaft*, Darmstadt, Wissenschaftliche Buchgesellschaft 2003, pp. 225-239.

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Fischer, M., Röben, P., “Berufliche Bildung im „lernenden Unternehmen“ und das Konzept der Kernberufe” in Schudy, J. (ed.): *Arbeitslehre 2001. Bilanzen – Initiativen – Perspektiven*, Hohengehren, Schneider, pp. 31-40, 2001.

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Fischer, M., Röben, P., "Ansätze und Resultate des Wissensmanagements in der europäischen Chemieindustrie. Ergebnisse aus großen Chemieunternehmen in vier europäischen Ländern" *Wirtschaftspsychologie*, Heft 3, Lengerich et al., Pabst Science Publishers, pp. 27-33, 2003.

Mariani, M., "Enforcing benefits of workplace learning in an era of temporary jobs", in Smith, M. J., Salvendy, G. (eds.), *Systems, Social and Internationalization Design Aspects of Human-Computer Interaction*, Mahway, New Jersey, London, Lawrence Erlbaum, pp. 34-37, 2001.

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Röben, P., "Organisationales Lernen in der chemischen Industrie" in Hecht, B. (ed.), *Chemieberufe in der Wissensgesellschaft*, Gütersloh, Bertelsmann, 2002.

[Back to table of contents](#)

**Research Institutions:**

Institute of Education  
University of London, United Kingdom

WAC Performing Arts and Media College, London, United Kingdom

Fondazione Centro Studi Investimenti Sociali, Rome, Italy

Centre for Research in International Migration and Ethnic Relations, Stockholm University, Sweden

Department of Media Education/Media Centre, University of Ludwigsburg, Germany

Forum Institute of Multicultural Development, Utrecht, Netherlands

Greek Council for Refugees, Athens, Greece

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**Context of the Research**

Discussions about refugees and migrants coming to Europe have often paid little attention to the actual experiences, contributions and opinions of the children involved. Yet children are at the front line in building the new social contacts necessary for successful social integration in their new countries and communities. European countries have very different histories of migration, different expectations of incoming migrants and different policies regarding their education, employment and social inclusion and these affect the processes of social inclusion or exclusion in different ways.

This is "action research" project addresses three major aspects of structural change in contemporary European society: the increase in global migration, the uses of new communication technologies, and the specific needs of children. The project has established media clubs in six European countries (U.K, Italy, Sweden, Germany, the Netherlands, Greece). In each club a researcher and a media educator work with recently arrived refugee and migrant children to make visual representations of their lives and their experiences in their new locations.

Using the Internet a communications network has been established between the clubs to facilitate the sharing of children's media productions. The project is investigating how these children represent and express their experiences of migration and how their use of new media might enable their perspectives to inform the development of European educational and cultural policies. In the process, the project is seeking to identify how particular experiences of reception; educational practice, family re-unification and community involvement may more effectively promote social inclusion and economic and cultural integration.

**Initial Conclusions**

1. Policy in the area of new technologies currently tends to assume that teaching 'socially excluded' children to use new technologies will necessarily bring about social inclusion. Research suggests that this is not the case, and that policies that seek to combat social exclusion in this way also need to pay attention to issues of pedagogy, social context and children's motivations to communicate.
2. Likewise, the promotion of media literacy and practical media production by young people can potentially create intercultural dialogue and offer opportunities for marginalized groups to represent themselves. However, this is not a guaranteed outcome: there is a need to devise pedagogic strategies that genuinely enable young people to express their perspectives and concerns.
3. Research communities need to come to some general agreement as to terms and definitions and categories when researching issues of migration and media especially in relation to children. At present due to different political and historical factors it is very difficult to draw comparisons that are applicable to social policies across Europe.
4. With the increasing use of media production technologies in the formal and informal sectors there is a need to address questions of distribution. Support specifically for media production by children needs to be addressed in the formation of policy relating to immigrant groups and media.

5. Contrary to much media rhetoric most of the video productions in the project show that the children's main concern was in developing and maintaining contacts in their new locations here and now rather than holding firmly to their past.
6. There are wide discrepancies across Europe in migrant children's access and uses of technology that need to be addressed. This is particularly important in relation to the skills and competencies that are needed to use technology creatively, and the kinds of settings in which this might best occur.
7. As the role of media education and literacy across Europe varies enormously, there is an urgent need for a comprehensive and systematic approach to develop ways in which government and other agencies might support the most effective pedagogic methods.
8. Refugee and migrant children have a strong sense of wanting to belong and be accepted in the here and now rather than identifying necessarily with their past. This has implications for policies relating to areas of discrimination in educational and media access and to issues of local neighbourhood safety and security which exacerbate these.
9. While refugee and migrant children have high educational aspirations these are often not supported by the pastoral and educational practices in schools. One particular area of concern in the formal sector is the lack of policies and practice in relation to both language acquisition of the new language and retention and utilisation (e.g. for examination success) of their other language/s. Another area is the lack of suitable mentoring or counselling that meets the needs of these children and their often very disrupted lives.
10. Informal practical media work with specific groups of children such as refugees is an effective research method in exploring their social and educational concerns. However, it is also necessary to balance this with work that reflects the children's desire to include children outside this grouping and reflect their real socially diverse worlds. Therefore in drawing up recommendations regarding practical media work the social milieu and interests of the children themselves should take priority.

### **Initial Recommendations**

1. There is a need for local, national and European wide media dissemination platforms on which refugee and migrant children can present their media productions and receive feedback from peers. These need to cater both for their national, ethnic and/or religious differences; to serve as a forum for cross cultural expression; and to provide a means of expressing and demonstrating their desire for inclusion in their new communities.
2. There is an urgent need to examine new media developments so that practices adopted across Europe both in formal and informal education harness the potentialities of technology to children's actual motivations to communicate. Communication policy in this field needs to become more user-oriented, and should not assume that technology has automatic benefits.
3. Efforts need to be made to fund concrete local and national initiatives using the possibilities of new media to give migrant/refugee children a stronger voice in the public sphere in relation to issues that directly affect them, rather than policy being determined by others on their behalf. These areas would include education (formal and informal), local amenities and neighbourhood safety.
4. There is a need for consistent and permanently funded home - school liaison work to support the ambitions of the children, to involve the family in the children's education more directly but also to keep the school in touch with its community.
5. Media education and practical work with children needs to take into account the increasing diversity of the media that children and especially migrant children and their families use for information and entertainment and that they draw on in their productions. The demand for diversity in this field has implications for European media broadcasting policy in connection with policies aimed at inclusion and the reflection of European cultural diversity.

**The project web site is at:** <http://www.chicam.net>

The final report will be available in October 2004.

Interim thematic reports will be available in February 2004 and May 2004.

[Back to table of contents](#)

## The Role of Language in the Mobilisation of Ethnic and Immigrant Minorities

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University of Florence, Italy

Berliner Institut fuer  
Vergleichende Sozialforschung,  
Berlin, Germany

IUFM, Institut Universitaire de  
formation des maitres,  
Toulouse, France

University of London, Institute  
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DG-Research under the Key Action  
“Improving the Socio-Economic  
Knowledge Base” of FP5

### Context of the Research

Language is often at the centre of the political mobilization of minorities within a majority group. It is a political issue and a cultural resort for minorities - playing a decisive role in the social integration of ethnic fringe groups and immigrants. However, these languages are hardly protected in any way.

This project is examining language policies through comparative studies of ethnic minorities in Germany, France, Italy, United Kingdom and Spain. The minorities involved are: the Frisians and the Turks in Germany, the Corsicans and the Tunisians in France, the Welsh and the Urdu speaking in the United Kingdom, the Sud-Tyrolean and the Chinese in Italy, the Catalans and the Moroccans in Spain.

Language policies are embedded in the social and political environment. Therefore, the project is dealing with the institutional framework conditions of language policies and the political discussions within the groups concerned. The main emphasis is on future minority language policies in the European Union with the aim of seeing intervention is needed outside the sphere of just language preservation, training and development.

### Initial Conclusions

1. Language developments in the process of the formation of nation-states have been widely discussed at intellectual and at political levels. However, the issue of language of mobile ethnic minorities has not been developed.
2. The way a language is defined or self defined as being a minority language, influences linguistic policies at the institutional level and in the community.
3. Understanding of what are majority and minority languages is dependent upon power relationships at cultural, social, economic and political levels.
4. Language is important for building and maintaining communities with both immigrant and territorial or national minority groups.
5. The legal protection of minority languages in the different national contexts is a recent phenomenon and has been influenced by international conventions and the European Union policies. Although there are differences in the various forms of protection, nation-state building is the main reason.
6. As well as territorially based minority languages, immigrant minority languages are transnationally dispersed.
7. Minority languages that are at risk of disappearing, as they are decreasingly being spoken and written - need a different approach from minority languages that are spoken world wide and are majority languages in other countries.

8. The issue of language and how it relates to the State and nationality is becoming a higher priority. A single language nation is likely to be exception in future Europe.

### **Initial Recommendations**

1. In spite of the differences in nation building, a comparison between the legislation protecting minority languages in the different European countries is needed in order to establish common European standards and good practices.
2. Identification between State, nationality and language should be considered in the historical perspective and in a critical way that allows the development of multilingual and multicultural societies in the perspective of stronger European integration.
3. A new approach to multilingualism should be promoted in all European schools.

### **Further Information**

The project started in September 2001. The Final Report is due in November 2004.

**The project's web site is at:** [http://www.emz-berlin.de/projekte\\_E/pj27\\_1E.htm](http://www.emz-berlin.de/projekte_E/pj27_1E.htm)

### **Key Publications**

*Regional and Immigrant Minorities and the Development of National Languages in Europe* (to be published in 2004).

[Back to table of contents](#)

## Students as "Journeymen" between communities of Higher Education and Work

### Research Institutions:

Gerhard-Marcator-Universität  
Duisburg, Fachbereich 2  
Erziehungswissenschaft –  
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Research under the Key Action  
“Improving the Socio-Economic  
Knowledge Base” of FP5

### Context of the Research

Most governments across Europe have policies in place to increase the number of students entering higher education. This is based on the assumption that higher education can supply the skills and qualifications in terms of “human capital” required for a more complex and technological working life. In addition, European policy is also focused upon increasing workforce mobility between European countries.

However, underlying these broad policies are factors at play that might determine how successful such policies might be for preparing students for working life within different institutions, educational systems and cultures. One determining issue is what people make of education as well as how education moulds people. This would be through the mutual interplay between institutions of higher education, and the students and teachers that populate them. Another issue is that the same educational initiatives might bring different results in different cultures. Other factors will determine the possibilities and hindrances for increased work force mobility between European countries.

This project is aiming to enhance the understanding of learning strategies, values and “worldviews” that students and novices apply within and across different learning environments - both in education and in working life. It aims to gain an understanding of students’ experiences of transitions from higher education to professional life in different European countries. In particular it is focusing on the cultural diversity of academic and work institutions in Europe. A multilevel and critical analysis of the relationship between the formulated policies for higher education and the way higher education is experienced by students and professional novices is also being conducted.

In this project, students in higher education are viewed as “journeymen” between the cultures of higher education and working life. By studying students as individuals and as members of a culture it is aimed to gain a better understanding of the relationships between cultural, educational and working life contexts.

Comparative studies are being conducted in Sweden, Norway, Poland and Germany using freshmen and seniors studying psychology, political science and other subjects. The senior students are also being interviewed after their first year of working life experience.

### Key Issues

The project is addressing:

1. How students from different countries and study programmes understand their university culture, envisaged work and the relationship between study and work.
2. How students and novices conceive of themselves as professionals
3. How newly graduated view their university education, particularly related to their future jobs.

4. To enhance better understanding of what contextual factors in the work place and at the university seem crucial in influencing the students.
5. To discern a "European dimension" – as regards the relationship between higher learning and professional work.

### **Further Information**

The full title of the project is "Students as "Journeymen" between communities of Higher Education and Work".

The project started in September 2001. The final report is due in September 2004.

### **Key Publications**

*An international comparison of Freshmen and Senior Students*, Project "Students as journeymen between communities of Higher Education and Work", European Commission contract HPSE CT-2001-00068, June 2003.

*Freshmen Students on Education and Work. National analyses*, Project "Students as Journeymen between communities of Higher education and work", European Commission contract HPSE 2001-00068, December 2002.

*Higher Education and Working Life: A state of the art report*, Project "Students as Journeymen between communities of Higher education and work", European Commission contract HPSE CT 2001-00068, November 2002.

*National comparison of Freshmen and Senior Students*, Project "Students as Journeymen between communities of Higher education and work", European Commission contract HPSE CT 2001-00068, April 2003.

[Back to table of contents](#)

### Research Institutions:

IRIS, Institute for Regional Innovation, Tübingen, Germany

Deutsches Jugendinstitut München, Germany

AREA, Asociacion Regional y Europea de Analisis, Valencia, Spain

University of Leiden, Faculty of Social and Educational Sciences, Netherlands

National Agency for Supporting Youth Initiatives, Bucharest, Romania

University of Copenhagen, Department of Psychology, Denmark

University of Lisbon, Institute of Social Sciences, Portugal

University of Ulster, School of Policy Studies, United Kingdom

National University of Cork, Department of Applied Social Sciences, Ireland

University of Bologna, Department of Educational Sciences, Italy

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## Active Participation and Informal Learning in Young People’s Transitions to the Labour Market

### Context of the Research

Many young people move from formal education into work by actively choosing what they wish to do in the labour market. However, for some, especially those with poor qualifications, their active participation in choosing their pathway is rather more limited and can result in a lack of motivation and disengagement. Their transition often involves them being channelled into training schemes, neglecting individual aspirations and failing to address individual strengths that do not directly correspond to formal qualifications.

This project focuses upon young people's active participation in their transition to the labour market by comparing disengaged young people with “risk biographies” to those with “choice biographies”. In addition, it also considers the impact of both formal and informal learning on this transition process by analysing policies for young people in transition, that involve active participation and recognition of informal learning. Using the case studies from different regions the project aims to assess whether these policies are successful at enhancing motivation for active re-engagement in transitions to work compared to existing conventional schemes. Specific consideration is being given to the impact of strengthening the role of local youth policies within national transition systems.

The research is taking place in nine European countries - Denmark, Germany, Ireland, Italy, Netherlands, Portugal, Romania, Spain and the UK.

### Initial Conclusions

1. Getting the active involvement of young people does not form a key part of existing transition policies.
  - Disadvantaged young people are seen as having “individual deficits” that need to be rectified rather than they being entitled to subjectively choose a meaningful career.
  - Compared to other parts of Europe, the Scandinavian countries seem to provide the most scope for active participation by providing choice at different levels. The orientation towards individual development of young people tends to be more important than direct entry into the labour market. Individual counselling is focused on enhancing intrinsic motivation. Participation in education and training is rewarded by financial allowances.
2. Young people across Europe and at different levels of education share a high distrust of formal education and employment related services such as vocational guidance.
  - They consider that they are not treated as individuals and are critical of being subjected to curricula and procedures that do not enhance their life prospects.
  - If available, they prefer informal rather than formal support.
  - But this does also reproduce social inequality. Those without formal qualifications and family support strategically increase their “resources” through informal learning and support. However, often they do not get the necessary recognition for their informal skills. Their social networks can be supportive, but also increase exclusion due to the lack of connections to other social systems.

- There is some evidence that young men have more difficulties in maintaining motivation after a series of de-motivating experiences in the formal system. Young women seem to be more capable of managing their motivation in a reflexive way although this may be hidden from those offering advice and support. But, this does not mean that they are more successful in finding their ways into recognised positions.
3. For most young people interviewed, their involvement in initiatives represented a “biographical turning point” where they could either re-invest the motivation they had individually maintained or experience a re-discovery of their motivation. They experienced:
- Relationships with project workers based on trust.
  - Being part of a “family” – due to close relationships with project workers and with other participants (group building being a central part of the project methods).
  - Non-formal learning and training situations in which they can influence the content, the speed and forms of learning.
  - Being given responsibility for their own learning, but also for processes and decisions regarding the group and the project.
  - Respect and recognition for their own choices and aspirations – even if not corresponding to the projects’ objectives (e.g. dropping out).
4. However, the experience of motivation through participation does not result in sustainable inclusion for all young people:
- There is limited success in effectively providing young people recognised qualifications *and* experiences of empowerment and motivation through active participation (still there are a few that do succeed).
  - Organised youth work projects are often highly participatory, but the competencies they provide are hardly ever recognised by employers, the employment service or training institutions.
  - Vocational training and employment schemes are often administrated by rigid guidelines limiting the space for individual choice and influence.
  - Projects funded by local municipalities are more likely to combine subjective and systematic aspects, respectively to integrate youth policy elements with education, training and labour market policies. However they are more vulnerable to policy change and they are a minor part of national transitions systems.
  - Most agencies are third sector organisations that have credibility with young people and the flexibility to consider individuals with different needs and interests. However, their funding situation is often unstable due to short-term policy initiatives.

## Initial Recommendations

Policies addressing young people in their transition from school to work need to:

1. Put young people at the centre of the policy and involve them in active participatory initiatives.
2. Consider that the lack of motivation of young people is due to restricted choice and lack of recognition of their assets rather than due to “individual deficits”.
3. Recognise and include youth work initiatives within integrated education, training and labour market policies.
4. Fund initiatives in a way that provides security and continuity for the organisations running them.
5. Develop initiatives that provide “hard” resources such as recognised qualifications, jobs and/or income for young people but within “soft” youth work settings.

Research into young people in their transitions to work should:

1. Consider the dynamics involved in the processes of de-motivation and re-motivation and what facilitates them.
2. Include subjective perspectives through qualitative research that can provide knowledge on the relevance that “policy offers” have for their “clients” and thus explain why some initiatives are used by young people and others not.

## **Further Information**

The full title of the project is: *Youth Policy and Participation. Potentials of participation and informal learning in young people's transitions to the labour market - A comparative analysis in 10 European regions*. The final report is due in October 2004.

The project web site at <http://www.iris-egris.de/yoyo/>. Several intermediate reports are available at this web site.

## **Key Publications**

No publications have been produced yet except working papers that can be downloaded from the project website.

[Back to table of contents](#)

## The Impact of Women's Studies on Women's Employment Opportunities in Europe

### Research Institutions:

University of Hull, United Kingdom

Åbo Akademi University, Finland

University of Sunderland, United Kingdom

University of Utrecht, Netherlands

University of Milan-Bicocca, Italy

University of Calabria, Italy

Université de Toulouse-LeMirail, France

Johann Wolfgang Goethe-Universität, Frankfurt/Main, Germany

University of Oviedo, Spain

Ljubljana University, Slovenia

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### Context of the Research

The Amsterdam Treaty identified a gap in the employment rates of women and men in Europe, resulting in the greater economic and social exclusion of women. However, over the last thirty years, significant numbers of women have undergone Women's Studies training. But, little is known about what happens to these women in the labour market. Anecdotal evidence suggests that Women's Studies training significantly impacts on women's employability, adaptability, entrepreneurship and the promotion of equal opportunities.

This project addresses this gap by researching the impact of Women's Studies training on women's employment in Europe. Women's Studies training includes - university degree courses in Women's Studies and gender training received through non-governmental organisations. The project involves an all-female research team from nine European countries - Finland, France, Germany, Hungary, Italy, Netherlands, Slovenia, Spain and the United Kingdom.

### Initial Conclusions

These initial conclusions have been grouped according to their impact on women's employability, adaptability and entrepreneurship and the promotion of equal opportunities:

#### Employability

1. Women's Studies postgraduates tend to work or are keen to work in areas concerned with women's issues particular feminist academic and research areas; women's non-governmental organisations and equal opportunities work - all of these tend to offer only insecure and frequently low-paid employment.
2. Taking a course in Women's Studies was considered as a means of enhancing job prospects.
3. However, some students view Women's Studies training as not necessarily an asset in the employment market. This is particularly so in organisations outside the academic and feminist research community, women's non-governmental organisations and those involved in equal opportunities work. Some students either deny the subject, or seek another educational field to avoid being stigmatised.
4. Women's Studies students tend to be less interested in a 'career' than in a fulfilling job. This means that they are less interested in how much money they earn than in the potential to make a difference through their job. This has implications for the notion of wealth creation, often measured entirely in financial terms. The issue of the 'contented workforce' plays a key role here, but also the way in which job satisfaction relates to fewer health problems and absenteeism.
5. In some countries such as the UK, Women's Studies training has enabled mature women students to enter postgraduate training and subsequently to enter the job market.

## Adaptability and Entrepreneurship

6. Although Women's Studies is often held in low esteem in academe, and employers are sometimes hostile to students taking the subject, it is resulting in producing individuals who are independent-minded and relatively high-risk takers - both desirable qualities in an uncertain job market.
7. Women's Studies training provide women with key knowledge and skills for the labour market. These include:
  - Gender awareness
  - Knowledge of equal opportunities
  - Self-confidence
  - Critical thinking ability
  - The ability to establish and sustain complex arguments
  - Abilities to work in a communicative, open style
  - Competence in dealing with diversity.
8. Women's Studies students are more willing to go into less established, innovatory work environments where work cultures are less entrenched.
9. Women's Studies training impacts most significantly on how women carry out their work, making them potential change agents in the workplace.
10. Women's Studies students reported a willingness to 'invent' their own jobs that is to think creatively about making employment for themselves.

## Equal Opportunities

11. Equal opportunities legislation in most European countries is not well understood, nor widely known by many people including those who have an awareness of gender issues.
12. Women's Studies training equips women to address the following issues at work:
  - Refusal to put up with sexist behaviour at work
  - Introduction of gender issues into the workplace
  - Working in a non-sexist manner
  - Fighting discrimination at work
  - Feeling more confident in making applications for promotion
  - Being more sensitive to issues of diversity
  - Being more supportive of female colleagues
13. Women's Studies training facilitate students' understanding of the gendered power asymmetries they routinely encounter in their working lives, enabling them to make sense of those experiences.
14. At school level students have limited exposure to gender issues as they are rarely included in the school curriculum.
15. In European countries where careers guidance is available, it reproduces traditional gender paradigms in the careers advice given to girls. Careers advisors lack knowledge of how Women's Studies can be utilized in the job market.
16. In some countries such as France, equal opportunities posts do not require any gender awareness training.
17. Women attending Women's Studies courses express a high degree of satisfaction, as they are able to better understand gender inequalities like unequal access to the labour market.
18. Women's Studies training has been institutionalised to the greatest extent in countries with a history of state feminism, modular higher education systems, and where universities are relatively autonomous. Nowhere in Europe has Women's Studies achieved full disciplinary status.
19. Some European countries have research centres in Women's Studies offering MAs/PhDs. However, most European countries still teach Women's Studies only at undergraduate level as modules within other traditional disciplines. Students are therefore likely to come across the subject by chance while already at university. This reduces impact and visibility of Women's Studies as a discipline.

## **Initial Recommendations**

### *Employability - European level:*

1. Policies to reduce working hours for all employees should be given more weight than policies encouraging part-time employment for women.

### *Employability - National level:*

2. Women's Studies courses for women aged 40+ should be set up to help them enter or re-enter education and the labour market.

### *Employability - Local/course level:*

3. A period of work placements during the course is advantageous to enable Women's Studies students to try out diverse employment sectors and to gain a realistic view of the labour market.
4. Women's Studies courses should include training for students in how to articulate and market their specific skills.

### *Equal Opportunities - European level:*

5. All European countries should offer careers guidance and it should incorporate gender awareness for both boys and girls.
6. Careers advisors should receive gender awareness training. Their activities should be regularly monitored and audited, including a gender audit, and incentives created to facilitate the promotion of men into traditionally female jobs and women's opportunities to work outside the service sector.
7. Domestic and care labour training should become part of the primary and secondary schools training for all boys and girls in all European countries.
8. Employers in all European countries should be required to carry out gender audits and to include action plans for improving gender imbalances.
9. Research needs to be undertaken to find the most effective ways and incentives that change attitudes to enable both women and men to pursue their chosen professional lives as well as cope with domestic labour and care-work.
10. International mentoring schemes for women with Gender Studies expertise need to be developed and promoted throughout the European Union through bodies such as the 'Women and Science' Unit.
11. To transform gender segregation in the labour market employers need to be offered incentives to make gender awareness part of their job specification, and to promote greater gender balance in employment.
12. European policy should support targeted positive action at national level to enhance women's participation and advancement in academe.
13. The full institutionalisation of Women's Studies as a discipline, available both within traditional subjects and as a stand-alone degree, should be part of the implementation of the Bologna Agreement.

### *Equal Opportunities - National level:*

14. All jobs that deal with equal opportunities should have a gender awareness-training requirement as part of their job description.
15. Women's Studies Centres should be supported to act as dissemination centres for gender research and equal opportunities along the lines of the Swedish National Gender Secretariat.
16. National mentoring schemes for Gender Studies experts need to be put in place.
17. National governments should consider using tax incentives and other fiscal measures to encourage employers to improve gender imbalances in areas such as promotion, the pay gap, and parental leave taken by men rather than women.
18. Gender audits and relevant action plans should be established as a central aspect of all public funding policies.

19. Countries such as Germany and France should introduce standardised job descriptions for commissioners of women's affairs/equal opportunities officers, which include the requirement for a background in Women's Studies.
20. All European countries should introduce targeted programmes to increase women's participation and advancement in academe.
21. Many European countries including Italy, Hungary, France and Slovenia need still to establish full professorships in Women's Studies in order to create the proper infrastructure for the subject.
22. All teacher-training courses should include a compulsory equal opportunities element.
23. National campaigns are required to promote equal opportunities legislation and women's rights within the work place.
24. National campaigns are required to promote awareness of issues such as violence against women, and the need for men's participation in domestic and care labour.
25. Schoolteachers should be given gender awareness training as part of their training curriculum and in subsequent staff development.

**General Issues - European level:**

26. Policy makers should support strategies that provide financial security for non-governmental organisations as they fulfil vital social functions that are often outside the scope of welfare systems.
27. Student and staff mobility programmes should be revised to include opportunities for short-term exchanges (one week to one month) to enable women and men with care/domestic responsibilities to participate in such schemes.
28. There is a need to review financial incentives aimed at achieving harmonization and a more competent workforce through greater mobility for educational purposes, as they are often too limited to enable students to take them up.

**General Issues - local/course level:**

29. As in other courses, Women's Studies students need to be trained by their lecturers to articulate the transferable skills they acquire during their training so that they can present themselves more effectively to prospective employers.
30. A period of work placements during the course would be advantageous as a means of enabling Women's Studies students to try out diverse employment sectors and to gain a realistic view of the labour market.

**Further Information**

The full title of the project is: *Employment and Women's Studies: The Impact of Women's Studies Training on Women's Employment in Europe*.

The project started in October 2001. The final report is due in October 2003.

The project web site at <http://www.hull.ac.uk/ewsi/>

**Key Publications**

All project reports completed to date are available on the project website.

The background data reports have been published in book form and can be obtained free of charge while stocks last by contacting the contact person.

[Back to table of contents](#)

## Legal Framework of New Governance and Modern Policy in Education throughout Europe

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Netherlands

University of Southampton,  
United Kingdom

University of Manchester,  
United Kingdom

Hochschule für öffentliche  
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Deutsches Jugendinstitut,  
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“Improving the Socio-Economic  
Knowledge Base” of FP5

### Context of the Research

Relationships between schools, government, parents and students are changing within education systems across Europe. Many governments are creating mechanisms for schools to become more accountable to parents and to government through standardisation of the curriculum and the increased use of quality assurance mechanisms. In some cases running alongside this increased accountability, is the delegation of greater responsibility to individual schools and school governors, often in the form of greater financial control. This also involves the individual school and sometimes volunteer school governors having to take greater legal responsibility for the management of their school and the safety of their students.

Underpinning all these changes is the legal and legislative framework established in education and other laws – which vary considerably across Europe.

This project has established a network of partners from Belgium (Flanders), The Netherlands, Greece, France, United Kingdom and Germany and other experts from Lithuania, Slovenia, Estonia, Romania, Bulgaria, Sweden, the Russian Federation and Austria. It is comparing the various national education systems from a legal perspective in order to identify the best and most used legislative instruments focusing on quality, safety, responsibility and liability.

The key areas of concern of this project include:

- Enhancing the quality of compulsory education.
- Encouraging the use of appropriate means of self-assessment and self-evaluation.
- Promoting greater equity and enhanced access through the assurance of quality in all schools.
- Reducing inappropriate barriers for mobility in Europe at school level through establishing a more consistent promotion of quality and standards

### Initial Conclusions

1. Educational systems with a high degree of educational freedom are able to provide a high degree of autonomy and quality at the same time.
2. The introduction of decentralisation policies has a profound effect on the administration of the education system at all levels. This presents officials and educationalists from the central ministry, regional, municipal and district authorities and schools with demanding challenges to adapt to new responsibilities.
3. New acts have been implemented for primary, secondary, vocational and higher education as well as for children with special educational needs aimed at developing children's independence of judgment, providing a broad, but balanced curriculum for emotional, social and moral development.

4. As some legislation describes attainment targets in rather general terms, checking schools' compliance can be difficult in some cases.
5. The processes of educational change, in any country, are extremely complex affairs and can be difficult to control, particularly as responsibility is increasingly delegated towards institutions and individuals.
6. "Change management" in educational reform is not one of managing, or controlling change, but of attempting to shape the environment in which it is to take place by creating conditions that are conducive to successful implementation.
7. Monitoring quality assurance tends to lead to successful implementation of changes.
8. Schools are now being given more autonomy and responsibility for their own quality, with less rules and regulations - at the input-side – for the curriculum and finance. However, - at the output side - parents, the government and other stakeholders want to hold schools accountable for their quality and want this quality to be controlled and expect actions to be taken if there seem to be quality problems.
9. As a consequence of the policy move towards decentralization, the role of evaluation has changed. External evaluation by the Inspectorate has shifted from merely supervision of the legal requirements to educational monitoring and quality assessment, based upon evaluation criteria and standards. Internal, school self-evaluation is strongly encouraged in order to fulfil both the improvement and the accountability function. Educational institutions are expected to bear responsibility for safeguarding the quality of the education they provide and systematic self-evaluation is strongly encouraged.
10. In some countries, schools have to publish a school guide for all parents - with the school plan as a point of reference. This school guide contains the results of the school in terms of examinations, the percentage of children from primary schools transferring to various forms of secondary education and specific features of the schools such as special programmes for music education or for science education.
11. Increasingly schools are being made financially accountable through the auditing of block grants received from government.
12. In some countries, the Inspectorate has developed standards to monitor the quality of education, which includes decision rules and qualifications for judging the extent to which a certain standard has been met. One method is a school quality profile that reveals the strong and weak points and is used as a basis for discussions with the school regarding possibilities and plans for further development.
13. In other countries the relationship between the minister, ministry, the Inspectorate and the schools is subject of discussion.
14. Self-evaluation is also strongly encouraged and schools are gradually proceeding towards using self-assessment instruments. Although implementation is growing, self-evaluation activities are not yet cyclic and systematic.
15. An emerging, but increasingly important issue, that still needs to be resolved in some regions - is who has the right to information on schools and the quality of education - parents, the inspectorate and the general public?

### **Initial Recommendations**

1. The Inspectorate should involve the school as much as possible in its judgement of the schools' quality.
2. All schools should be encouraged to develop a school plan that defines the school's own quality standards in consultation with stakeholders - parents, local citizens and local associations.
3. Schools have to show how they interpret and realise the precise attainment targets as prescribed by the Education Acts.
4. Evaluation criteria should be developed in consultation and these criteria could be translated into items for questionnaires and observation forms. Training in using them and in scoring should be provided.

## Further Information

The project started in July 2001. The final report is due in July 2004.

Further details are also on the project web site at <http://www.lawandeducation.com>

## Key Publications

### Books

Glenn, C. & De Groof, J., *Freedom, Autonomy and Accountability in Education*, Lemma, 2002, Vol. 1, 595 p., Vol. 2, 528 p.

De Groof, J. & Lauwers, G., *Globalisation and Competition in Education*, forthcoming.

### Articles in a journal

Vol. 6 of the *European Journal of Education Law and Policy* is dedicated to the issues of responsibility and liability in education EJELP, Vol. 6, no. 1/2, 2002.

- Responsabilité civile et pénale des personnels de l'enseignement primaire et secondaire en cas d'accidents: Etat des lieux et perspectives - Martine Denis-Linton
- General developments in our society linked to responsibility and liability - Charles Glenn
- Civil liability within the education system : The Belgian Framework - Daniëlle Deli
- Liability under education law in the UK – How much further can it go? - Neville Harris
- La sécurité des établissements scolaires : Etat et collectivités face au partage de responsabilités - Jean Marie Schleret
- Occupational accidents in education - Ria Janvier
- Responsibility and Liability for the Behaviour of Minors - E.M.V. Dubelaar
- Liability issues in American Schools - Charles Russo
- The new challenges of education and the law - Kishore Singh
- Responsibility and liability in education in Austria - Werner Hauser
- Responsibility and liability in education in England and Wales - Paul Meredith
- Réponse Française au questionnaire - André Legrand
- Liability and responsibility in education. A German perspective - Georgios Gounalakis
- Responsibility and Liability in Education in Greece - Panayiotis Poulis and Theodore Fortsakis
- Responsibility and liability in education in Ireland - Dympna Glendenning

[Back to table of contents](#)

**Research Institutions:**

University of Bremen, Germany

Institute for Employment  
Research, University of  
Warwick, United Kingdom

BETA/Céreq Alsace, University  
Louis Pasteur of Strasbourg,  
France

Departament de Didàctica i  
Organització Escolar,  
University of Valencia, Spain

Technical University of Tallinn,  
Estonia

University of Patras, Greece

National Observatory of VET  
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Research under the Key Action  
“Improving the Socio-Economic  
Knowledge Base” of FP5

**Context of the Research**

Workers and employees in Europe are increasingly exposed to demands on flexibility and mobility at work. They are challenged to deal with and adjust to continuous changes in the work context generated through technological innovations, globalised economies and organisational restructuring.

Adjusting to these changes requires specific learning and work attitudes that enable the individual to actively engage in work processes in order to ensure their successful integration into the labour market. Depending on the work circumstances individuals can be identified as having specific characteristics or work-related identities.

This project investigates the role that work-related identities play in these forms of adjustment that workers are expected and required to make over time. The project has aimed to better understand the role of work identities that individuals develop through their interaction with work processes and different contexts. The project has looked at how these processes work in a time of change and how they influence an individual's concept of work. This is important, because an individual's concept of work and how they identify with their job, the work environment or the employer considerably determines their work commitment. Work commitment provides the basis for motivation, good work performance and quality of work that makes individual and collective productivity possible and functional.

In order to represent the variety and diversity of Europe with regards to the cultural, socio-economic and political embedding of work concepts, occupations and vocational education and training systems the project is being conducted in seven European countries - Czech Republic, Estonia, France, Germany, Greece, Spain and the United Kingdom - focusing on different occupations across five contrasting sectors - metal working industry/engineering, health care, telecommunications/IT, tourism and timber and furniture.

**Key Conclusions**

1. Three dominant modes of ‘strategic action’ of employees in forming their work-related identities have been identified:

- In most of the occupational groups investigated there are employees with an affiliation towards classical types of occupational identities with a high level of identification either with the occupation, the employer, the product or the daily work tasks. For this group of employees, changes in the working environment present a real challenge, as they often do not have the means or personal resources to adjust flexibly to new demands. Many of them develop a ‘retreat’ or ‘identification’ strategy (i.e. holding on to traditional elements of identification) with the aim of conserving as much as possible their current work status and work tasks with little or no inclination towards learning, professional development or changing working conditions including employers.
- At the other extreme, there are highly dynamic and pro-active employees, with a highly flexible type of work identity, who anticipate and internalise the requirements for continuous adjustments and changes in the work place. They are highly flexible and mobile, often combining a good mix of technical and hybrid social skills, but they also use flexibility and mobility

as an instrument to actively develop their career plans and professional development. Their work identity is highly individualised, primarily based upon their personal skills, capacity for continuous learning and a project oriented work attitude.

- Between these two extremes there is a continuum of several forms of work identities that can be characterised as different kinds of ‘adjustment’, ‘re-definition’ or ‘cross-border’ strategies. These generally represent a more conditional form of adaptation – the individual may remain in an occupation and/or with a particular employer, but they recognise that this represents a compromise rather than an ideal situation. Typically factors from outside work (family commitments, personal networks, attachment to a particular location) may ‘hold’ an individual in place. The individual may still seek to satisfy the expectations (of employer, colleagues and customers, patients or clients) of how they should perform their role, but they typically have some reservations about their work or employer. However, employees may remain in the same job for a considerable period of time, but may (internally or externally) move on if the ‘holding’ circumstances or external conditions change.
- 2. Employer-employee relations are increasingly based upon a ‘user-provider’ concept of work by which the employee is rather considered as a self-employed ‘entrepreneur’ who is selling his or her services, skills and competencies upon demand. This model assumes a high level of flexibility, continuous learning, risk management capacity and the ability to actively shape and construct one’s own professional development and identity.

This new form of employer-employee relations has a number of implications:

3. It promotes and supports a general trend towards the “individualisation” of work identities away from classical collective forms of work-related identities. This makes collective bargaining for workers and employees difficult. Instead, collective bargaining strategies are increasingly being replaced by individual negotiation to deal with tension and conflict situations at work.
4. For the employer, it transfers responsibilities for training, learning and professional development from the company to the individual level.
5. For the individual employee a pro-active, “entrepreneurial” multi-skilled work attitude develops complex, flexible and multi-dimensional work identities that can be continuously be adjusted to the requirements of change. Stability and continuity that were formally generated through, for example, by the employment contract and a stable company attachment, increasingly have to be actively constructed by the employees themselves.
6. However, not all employees and workers possess the personal resources to cope with such requirements concerning work, skills and professional development. For example, high pressure for time flexibility and horizontal mobility that involve changing work tasks, roles or employers, often lead to stress and a lack of control over work performance. This can be observed especially within occupations and organisations where the requirements for flexibility and mobility are high and related forms of work organisation and tasks are changing rapidly such as in the IT sector.
7. There is also a danger of segmentation of the work force by excluding an increasing number of people who cannot or do not have the means to be an “entrepreneurial” type of employee, because they lack the right qualification or skills; they may come from a disadvantaged socio-economic background; they may not be very flexible in general or prefer to hold onto more classical forms of work concepts.
8. The number of workers in Europe who are not of an “entrepreneurial” type and thus could be at a disadvantage is potentially high.
9. This has implications for the social costs that might be incurred by government and other agencies. These costs are dependent on the extent to which workers and employees are equipped and prepared to cope with these changing requirements.

## **Key Recommendations**

1. Most employees, but particularly skilled workers over 35 years of age need to be actively supported and guided to cope with changing work environments and avoid them falling into a passive ‘retreat’ strategy that will ultimately lead to their professional exclusion.
2. There is a need to encourage flexibility in learning during and between initial education and work-related continuous vocational training by:

- Promoting “curricular flexibility” through the development of a balanced mix between specific/technical knowledge and transversal generic/soft skills;
  - The accreditation of informal learning to allow for a voluntary and effective access to further learning, promotion and horizontal job movements;
  - The development of a “competence audit regime” (“Bilan de Compétences”) that can be used as a guidance instrument to support the individuals in successfully responding to the demands for flexibility and mobility and empower them to become agents of their own socio-professional development.
3. There is a need to develop more comprehensive and active socio-vocational inclusion/re-inclusion programmes based upon effective and individualised accompaniment and continuing follow-up.
  4. There is a need to encourage self-initiated and directed continuous vocational learning and “competence audits” for self-guided socio-professional development.

## Further Information

The full title of the project is: *FAME - Vocational Identity, Flexibility and Mobility in the European Labour Market*.

The project started in March 2000 and finished in July 2003.

The project’s web site: <http://www.itb.uni-bremen.de/projekte/fame/fame.htm>

## Key Publications

### Working Papers:

Brown, A., Marhuenda, F. and Navas, A., *Managers’ perspectives on work-related identities, flexibility and mobility in the employment and deployment of radiographers in the UK and Spain*, IER, University of Warwick, 2002.

FAME Consortium, *Work-related Identities in Europe: How Personnel Management and HR Policies Shape Workers’ Identities*, ITB Working Paper Series No. 46, University of Bremen 2003.

Laske, G. (ed.), *Project Papers: Vocational Identity, Flexibility and Mobility in the European Labour Market (FAME)*, ITB Working Paper Series No. 27, University of Bremen, 2001.

Kirpal, S., *Nurses in Europe: Work Identities of Nurses across 4 European Countries*, ITB Research Paper Series, 07/2003.

### Books:

Marhuenda, F., Navas, A. and Roda, F. *Explorando las identidades profesionales. Materiales curriculares para el área de FOL*, Universitat de València, ISBN: 84-370-5546-6, 2003.

Martínez, F., *Condiciones de trabajo e identidad laboral en el sector hotelero en la Comunidad Valenciana*. Universitat de València, ISBN: 84-370-5655-1, 2003.

### Chapters in books:

Brown, A. and Kirpal, S. (2002) ““Old nurses with new qualifications are best’: managers’ attitudes towards the recruitment of health care professionals in Estonia, France, Germany, Spain and the United Kingdom”, Forthcoming in Warhurst, Keep and Grugulis (eds.), *The Skills that Matter*, New York: Palgrave.

### On-line publications:

Dif, M., “On the Emerging Models of Labour Flexibility within the French CVT Institutions: Implications for inclusion, skill and identity formation”, paper presented at TSER FORUM on “Identities in VET and Labour Market”, Nant Gwyther, Wales, 29 June - 2 July 2000. - [http://www.theknownet.com/xml/forum\\_front/changing\\_identities/meat.html](http://www.theknownet.com/xml/forum_front/changing_identities/meat.html)

Dif, M., “Induced Labour Mobility through Continuing Vocational Training: Investigating its Development in the French Context during the Last Three Decades”, in Manning, S. & Raffè, D. (eds.), *VETNET ECER 2000 Proceedings*, <http://www.b.shuttle.de/wifo/abstract/difmh01.htm> - (also at ERIC “Resource in Education” since September 2002)

[Back to table of contents](#)

## Towards Sustainable Employability through Participation in Continuing Vocational Education and Training

### Research Institutions:

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“Improving the Socio-Economic  
Knowledge Base” of FP5

### Context of the Research

A critical issue for sustainable socio-economic development of all regions of Europe is the ability to ensure that those who are already in employment continue to have the skills and qualifications that are required for continuous changes in the workplace. This requires adequate and effective policies to be designed, developed and implemented for continuing vocational education and training.

This project is analysing the structural, organisational, and individual factors that influence employees' decisions to participate in continuing vocational education and training. It is looking at employees using technical skills from industrial small and medium enterprises in Germany, Greece, Italy, Portugal, Spain and the United Kingdom. It is also studying the attitudes of employees using technical skills towards their participation in continuing vocational education and training, including using information and communications technology skills.

The project is aiming to understand the factors influencing an individual's decision to participate in continuing VET offerings and to engage in informal learning processes. It is assessing and characterising the attitudes of employees using technical skills toward participation in continuing vocational and educational programmes and engagement in informal learning processes.

### Initial Conclusions

1. Where technical work is challenging, most continuing vocational learning takes place outside formal training programmes.
2. As well as updating technical skills employees also need to further develop a range of more generic skills, including planning, problem solving, communication, IT and management skills.
3. Self-directed learning needs to increase significantly through activities that encourage learning how to learn and through the promotion of lifelong learning.
4. Learning how to organise knowledge effectively and applying it appropriately is vital for technical workers development.
5. However, provisional findings suggest situational factors and individuals' attitudes towards continuing vocational education and training have most influence on participation in continuing training offerings in some settings.

## Key Recommendations

1. The focus of strategies for skill development should be upon continuing vocational education, training and *learning*, rather than just upon participation in continuous vocational education and training.
2. Greater attention should be given to helping employees become more effective in supporting the learning of others at work.
3. There is a need to focus upon the development of hybrid skills rather than just technical skills development.
4. There is a need to encourage the spread and sharing of tacit knowledge, through the combination of individual mobility plus formal and informal networks that will increase the competitiveness of companies in particular districts or sectors.
5. Public training institutions should implement policies to promote continuing training for professional and company development. In particular, a policy for self-learning through e-learning strategies should be developed and implemented.
6. Policies to promote and ensure quality in continuing training in small and medium industrial enterprises should be developed and implemented. Incentives for training of quality should be integrated into policies.
7. Policies should integrate measures to make employers and managers aware of the need to promote continuing vocational education and training for technical workers. In particular, policies should include measures to make companies develop strategies, not only to reduce participation barriers, like situational factors and individual attitudes, but also to implement incentives emphasising the role of training for job performance.

## Further Information

The full title of the project is: *Participation in Continuing Vocational Education and Training: a need for a sustainable employability*. The project started in November 2001. The final report is due at the end of 2004.

The project web site at: - <http://www.academus.pt/public/EstudosPlanmnt/ProjCurs/PARTICIPA.doc>

## Key Publications

Figueira, E., Brown, A., Entonado, F., Alves, M., Tomassini, M., Patiniotis, N., Grollmann, P. (2002), *Active adults' participation in Continuing Education in Alentejo*, paper presented in XV World Congress of Sociology, Brisbane – Australia, 7-13 July 2002.

[Back to table of contents](#)

## Challenges for Education and Training Policies and Research Arising from European Integration and Enlargement

### Research Institutions:

Academic Information Centre,  
National Observatory, Latvia

Université Louis Pasteur,  
France

Forum for European Regional  
Policies, University of Bremen,  
Germany

Fafo Institute of Applied Social  
Science, Norway

Human Resource Development  
Centre, Bulgarian National  
Observatory, Bulgaria

Institute for Educational  
Sciences, Romania

National Training Fund, Czech  
Republic

Navreme Knowledge  
Development, Austria

Tallin Technical University,  
Estonia

University of Stirling, United  
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University of Tampere, Finland

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“Improving the Socio-Economic  
Knowledge Base” of FP5

### Context of the Research

“European society” tends to mean a society where citizens will have “the feeling of belonging to the European Union” whilst still being rooted in regional traditions and cultures. The process of European integration thus includes the development of supra-national structures and identities through common economic, financial and legal structures, whilst still preserving and developing regional and national cultural characteristics.

There is no historical precedent for this form of integration. It involves a dynamic and not always conflict-free interplay of factors that presents a particular challenge as well as creating new unique opportunities. At the same time European integration and enlargement are taking place in the context of larger trends:

- The globalisation of economies that is leading to the restructuring of learning related policies as an element of international competition.
- The implementation of a knowledge-based society that is accompanied by the institutional and contextual adaptation of learning related policies towards the needs of the emerging learning society.
- The Eastern European countries’ move towards a market economy.

This further integration and enlargement of the European Union is expected to have an impact on learning related policies in both EU member states and Accession countries. Alongside this broadening of the EU, an expressed desire is to create a “Learning Society” and a “Knowledge Based Economy”.

This project has established a thematic network that is investigating the impact of different national education and training cultures on integration and the effect of the process of integration and enlargement on the different national education and training cultures. This is being done by looking at the influence of politics, culture and history on learning related policies, as these are challenges for the transition countries and developments towards EU integration. It involves researchers from eleven European countries: Austria, Bulgaria, the Czech Republic, Estonia, Finland, France, Germany, Latvia, Norway, Romania and the United Kingdom. In addition there are representatives from Italy, Spain, Hungary, Lithuania, Poland the Slovak Republic as well as from China, Japan and South Korea who are involved in the discussion about the concept of the Learning Society.

### Key issues

The interplay between national and European policies in the fields of education and training, science and technology and labour market is being addressed from three different perspectives covering learning related policies:

1. In member states and regions between internationalised challenges and national systems –the perspective of member states and regions. Key issues involve:
  - “Europe” as a subject of learning in Education and Training
  - Creating and facilitating the European learning citizen
  - Shaping European learning related policies, the role of member states and the civil society
  - Member states responding to learning related policies of the European Commission.

1. Challenges and opportunities of EU integration and enlargement –the perspective of candidate countries in the period of transition. Key issues involve:
  - Challenges of European integration.
  - Challenges of European enlargement.
  - Processes of change towards the ‘learning society’.
  - Processes of economic transition in candidate countries, their challenges and impacts.
  - Challenges arising from European-level learning-related regulations. Policies and requirements for current and future member states.
  - Challenges for learning-related policies at national, regional and European levels and their impact.
  
2. Preparation for a broader European Union. European policies and research – the European perspective. Key issues involve:
  - Employability
  - Exclusion
  - Mobility
  - Identity

### **Further Information**

The full title of the project is: *Towards the European Society: Challenges for Education and Training Policies and Research Arising from the European Integration and Enlargement.*

The project started in September 2001 and the final report is due in April 2004.

The project website is: <http://www.learningpolicies.net/>

### **Key Publications**

Publications are likely on the following subjects:

“The Learning Society in an international discourse”

“Learning related policies in EU member states and regions between internationalised challenges and national systems – the perspective of member states and regions”.

“Learning related policies, challenges and opportunities of EU integration and enlargement –the perspective of candidate countries in the period of transition”.

“Learning related policies preparing for a larger and deeper EU. European policies and research – the European perspective”.

[Back to table of contents](#)

**Research Institutions:**

University of Surrey  
Roehampton, London, United  
Kingdom

Johannes Kepler University,  
Linz, Austria

Sofia University, Sofia ,  
Bulgaria

Centre for Higher Education  
Studies, Prague, Czech  
Republic

National and Capodestrian  
University of Athens, Greece

Continuing Education  
Development Foundation,  
Ministry of Education, Riga,  
Latvia

Centre for Educational  
Research, Vytauto Magnus  
University, Kaunas, Lithuania

Universiteit Leiden, Leiden,  
Netherlands

Jagiellonian University,  
Krakow, Poland

Royal Institute of Technology,  
Stockholm, Sweden

Society for Research into  
Higher Education, London,  
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**Context of the Research**

Across the world institutions are being encouraged to widen participation to learning and increase access to higher education for up to half the workforce. There is also pressure on higher education to provide portable, economically relevant qualifications within a system that is fully accountable. Within Europe including countries that are soon to join the European Union, there is a need to accommodate a diversity of cultural and economic influences whilst moving towards a compatible qualifications system.

This project has established the Higher Education Reform Network to explore how different cultural contexts influence the procedures for the governance, decision-making, quality assurance and accountability of higher education with particular reference to issues of gender, disability, access and inclusion. It aims to help improve European integration strategies for the future and involves organisations from Austria, Bulgaria, Czech Republic, Greece, Latvia, Lithuania, The Netherlands, Sweden, Poland and the United Kingdom.

**Key issues**

Within the framework of the states of the European Union together with the accession and candidate countries, the network is addressing the key question: “What is the relationship between higher education and society in a world of change?”

The key issues are those that define this relationship, especially:

1. Past and present social trends and their consequences for higher education;
2. Value systems underlying national strategic and decision making processes that apply to higher education in a changing society;
3. The implications for higher education systems of policies to assure inclusion with particular reference to the roles of gender and disability;
4. Higher education’s responsibility towards the development of tomorrow’s “European” citizens;
5. The implications for higher education of the development of lifelong learning and continuing education;
6. The perceived and actual relationships between higher education and transitions to work.

**Further Information**

The full title of the project is: *Higher Education Reform Network: a collaborative partnership to explore, disseminate and advise on the university of tomorrow in relation to societal change and lifelong learning needs and in the context of European enlargement.*

The project started in November 2001 and the final report is due in October 2004. The project web site at: <http://www.hereform.net/>

**Key Publications**

No publications have been produced yet, but work in progress can be seen on the project web site.

[Back to table of contents](#)

## Creation of New Occupational Patterns for Cultural Minorities: the gypsy case

### Research Institutions:

CREA (Centre for Social and Educational Research)  
University of Barcelona, Spain

ISSSCOOP (Cooperativa de Ensino Superior Intervenção Social), Portugal

IREA (Romanian Institute for Adult Education) University of West Timisoara, Romania

Guildford Institute, University of Surrey, United Kingdom

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This project has been funded by DG-Research under the Key Action “Improving the Socio-Economic Knowledge Base” of FP5

### Context of the Research

Active citizenship and participation is becoming ever more important as decisions are increasingly being based on consensus and agreement rather than being imposed by authority. This is increasing the need for all communities including minority groups to be listened to, and to be involved in decision-making.

For example, the Romani community, who experience educational, cultural and work exclusion need to be included and actively involved in the formation of policy that aims to overcome these forms of exclusion. Consideration also needs to be given to the contributions of solidarity and cultural values that Romà are able to give to the wider community.

This project aims to identify the barriers to work exclusion of Romà and ways of overcoming them. It analyses the skills that Romà have developed as a social group and identifies how these skills can contribute to the enrichment of the labour market and social cohesion. The activities of the project are being developed in five countries Spain, Portugal, Romania, France and the United Kingdom.

### Initial Conclusions

These initial conclusions have been developed by involving the Romani people in the project from the beginning:

1. Racism is the most influential factor in the social exclusion of Romà, followed by economic or work-related barriers. In work it creates barriers for Romà to enter into the labour market.
2. Explicit racism in some companies shows itself through “internal non-written rules” that prevent Romani people being employed.
3. Often employers do not allow Romani people to develop the skills to enter new work roles.
4. In the knowledge society, access to the labour market largely depends on academic qualifications. This affects Romani people given their educational history of exclusion. Education is a key factor that permits the overcoming of social, cultural, economic and labour inequality.
5. The presence of Romani and other minority cultures in the organisation and functioning of course content and school practices favours its inclusion and social participation, and increases the success of the school as a tool for overcoming exclusion in cultural or ethnic terms.
6. Education can contribute to overcoming inequalities and social cohesion by not only providing the knowledge and skills but also an emancipating experience.
7. However, it has been found that, within the whole population in general and in the Gypsy Community in particular, grouping students in school according to cultural differences or learning levels does not facilitate school success nor help to overcome inequalities.

8. The best educational experiences begin within the school context and ripple out into the community. Equal participation in the community and in educational centres is the driver for community development and contributes to educational quality.
9. Romani women experience exclusion on at least two levels: for being a woman and for being Romani. This creates stereotypes i.e. Romani women lack of interest in education and work and are more concerned with the home and family than with professional and educational training and access to the labour market.
10. However, the knowledge and information society does offer a number of tools for overcoming old and new inequalities. Many Romani individuals and organisations are making the most of these new possibilities.
11. Fortunately, these new forms of economic organisation coincide with certain principles of organisation and development by Romani family businesses and the economical activities of Romà.
12. Romà have skills and competencies that coincide with certain aspects of new occupational profiles that do enable them equal access into the labour market.
13. Romani Associations are contributing to the recognition of Romà, its social, educational and work inclusion and are contributing to the fight against discrimination that they experience.
14. Romani culture does have traditions and values of great worth that can be useful for social cohesion and co-existence: solidarity and inclusiveness, and resolution of conflicts and dialogue.

### **Initial Recommendations**

The following initial recommendations apply to both Romà and other ethnic minorities:

1. Policies need to be developed with the involvement of cultural minorities in order to understand their needs and enable concrete measures to be developed that facilitate equality.
2. Actions that pursue the inclusion of ethnic minority voices (like Romà) have to take into account the value of multiculturalism, where different cultures are expressed in a context of equality and interculturality, where positive synergies are produced for all. This particularly affects social and educational practices and policies.
3. There is a need to recognise previously acquired skills and provide accreditation of prior knowledge.
4. Romà is a global culture and not a territorial culture, therefore specific international policies are required in order to best meet their needs.
5. The European Union provides opportunities for the establishment of such policies particularly in the area of education and employment as a means of achieving social inclusion.

### **Further Information**

The project started in October 2001. The final report is due in November 2004.

The project web site at <http://www.neskes.net/workalo/indexan.htm>

### **Key Publications**

Alexiu, T. M., "The gypsy community excluded from the knowledge society", *Revista de Stiinte ale Educatiei (Journal of Educational Sciences)*, no. 1 (6), Editura Universitatii de Vest, 2002, pp. 117-122.

Daly, J., Walters, N. and Townsend, L., "Reflections from Gypsy and Traveller Sites in the United Kingdom", *European Journal of Lifelong Learning in Europe*, Helsinki, KVS Foundation. Vol V11 Issue 3, 2002, pp.168-173.

Marinho, M., and Inês Amaro, "Os Ciganos em Portugal - aproximação I", *Revista Intervenção Social*, no.27/28, June 2003.

Rus, C., "Traduire l'interculturel en Roumanie", in Gohard-Radenkovic, A., Mujawamariya, D., Perez, S. (eds), *Integration des "minorites" et nouveaux espaces interculturels*, Berne, Peter Lang, 2003.

#### Forthcoming Publications:

Arriaga, M., Lleras, J. & Serradell, O., Bases teòriques i metodològiques d'un projecte orientat a la transformació social. *Àmbits de Política i Societat*. Barcelona: Col·legi de Doctors i Llicenciats en Ciències Polítiques i Sociologia de Catalunya.

Fernández, M., Flecha, R. & Tellado, I., Introducció: recerca sobre i amb la comunitat gitana. *Àmbits de política i societat*. Barcelona: Col·legi de Doctors i Llicenciats en Ciències Polítiques i Sociologia de Catalunya.

Flecha, A. & Puigvert, L., Dones gitanes i transformació social. *Àmbits de Política i Societat*. Barcelona: Col·legi de Doctors i Llicenciats en Ciències Polítiques i Sociologia de Catalunya.

Gómez Bahillo, C., Molina, F. & Oliver, E., Barreres i possibilitats de la comunitat gitana en el mercat laboral a Europa. *Àmbits de Política i Societat*. Barcelona: Col·legi de Doctors i Llicenciats en Ciències Polítiques i Sociologia de Catalunya.

Gómez, J. & Vargas, J., Why Romà do not like mainstream schools: Voices of a people without territory, *Harvard Educational Review*, Cambridge, MA, Harvard University.

Miquel, V., Rotger, J.M. & Vargas, J., El poble gitano a la societat de la informació. *Àmbits de Política i Societat*. Barcelona: Col·legi de Doctors i Llicenciats en Ciències Polítiques i Sociologia de Catalunya.

[Back to table of contents](#)

### Research Institutions:

The Research Institute of the Finnish Economy (ETLA), Finland

Université Panthéon-Assas (Paris 2), Equipe de Recherche sur le Marchés, l'Emploi et la Simulation (ERMES), France

Zentrum für Europäische Wirtschaftsforschung, Germany

Centre for Economic Research and Environmental Strategy (CERES), Greece

Fondazione Eni Enrico Mattei, Italy

Institute for Social Research, Norway

Universidade da Madeira, Portugal

Stockholm University, Swedish Institute for Social Research (SOFI), Sweden

University of London Institute of Education, United Kingdom

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This project has been funded by DG-Research under the Key Action “Improving the Socio-Economic Knowledge Base” of FP5

### Context of the Research

The EU and most national governments consider educational expansion as an important policy tool when trying to reverse or slow down the rise in inequality observed in a growing number of European countries. At the same time, emerging evidence reveals that aggregate wage inequality is due not only to differences between educational groups but arises from differences within these groups as well. This project aims at deepening the understanding of the interplay between educational expansion and wage inequality in Europe based on comparative research on nine European Countries (Finland, France, Germany, Greece, Italy, Norway, Portugal, Sweden, and the UK).

### Key Issues

The project is addressing:

1. European wage inequality in order to provide a broad-based European-wide understanding of the static and dynamic nature of overall wage inequality.
2. The between-group and within-group dimensions of wage equality with respect to three key characteristics: education, age and gender.
3. The relative importance of the education-wage link *between* as well as *within* cohorts, and its evolution over time within and between the European countries.
4. The impact of existing policy on education-wage links in order to make recommendations for future policy by looking at labour market flexibility; educational, skill and institutional quality differences; over-education and job competition; gender differences; and experience and training.

### Further Information

The full title of the project is: “Education and wage inequality in Europe”. The project started in November 2002. The final report is due in June 2005.

Interim results will be reported at two policy-oriented workshops in May or June 2004 and in April 2005.

The project web site at <http://www.etla.fi/edwin/> will be continuously updated with information on events, reports and results.

[Back to table of contents](#)

## Higher Education Institutions' Responses to Europeanisation, Internationalisation and Globalisation

### Research Institutions:

CHEPS, University of Twente, the Netherlands

University of Athens, Greece

University of Kassel, Germany

Institute of Education, University of London, United Kingdom

Norwegian Institute for Studies in Research and Higher Education, Norway

Center for Higher Education Policy Studies, Portugal

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This project has been funded by DG-Research under the Key Action "Improving the Socio-Economic Knowledge Base" of FP5

### Context of the Research

Europeanisation, internationalisation and globalisation are trends that identify the increasingly supra-national context in which higher education institutions are operating. This new context represents a range of challenges that cannot be seen separately from the ones related to the developments towards a knowledge economy, the role of new technologies and developments towards lifelong learning.

This project aims to identify and analyse higher education's response to the challenges of Europeanisation, internationalisation and globalisation and the (supra)national contexts, the organisational settings, and the policies and activities aimed to support this response. It involves researchers from seven European countries - Austria, Greece, Germany, the Netherlands, Norway, Portugal and the United Kingdom.

### Key Issues

The project is addressing the following key issues:

1. The changing focus and scope of European-level policies in the context of Europeanisation and internationalisation of higher education.
2. Determining how and to what extent national higher education policies are influencing the internationalisation of this sector. The impact of European-level policies at national level and how countries respond to globalisation in higher education is also being addressed.
3. Institutional strategies are being addressed with particular attention on how institutional actors perceive these trends and related challenges.

### Further Information

The project started in November 2002. The final report is due in November 2004. Interim results will be available in November 2003.

The project web site:

[http://www.utwente.nl/cheps/research/current\\_projects/track\\_2/2CHEinstitutionsresponses.doc/](http://www.utwente.nl/cheps/research/current_projects/track_2/2CHEinstitutionsresponses.doc/)

[Back to table of contents](#)

### Research Institutions:

University of Joensuu, Joensuu  
Centre for Ethnic Studies/ Dept.  
of Applied Education, Finland

University of Tartu, Dept. of  
Political Science, Estonia

University of Paris 8, Institute  
Maghreb-Europe, France

University of Koblenz-Landau,  
Centre of Educational Research,  
Germany

Information Centre for Racism,  
Ecology, Peace and Non  
Violence, Greece

University of Haifa, Israel

University of Porto, School of  
Economics, Portugal

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“Improving the Socio-Economic  
Knowledge Base” of FP5

### Context of the Research

Current tension between evolving trans-national political and economic structures and national identities constitutes a serious challenge both for European and national decision-makers. In many European states, the recent tendency involves an increasing tolerance towards dual citizenship.

This project analyses policies and their implementation in the area of citizenship, especially dual citizenship, in Estonia, Finland, France, Germany, Greece, Israel, Portugal, and the United Kingdom. It focuses on the prevailing rules and practices, as well as on experiences and attitudinal orientations related to the acquisition and attribution of dual citizenship.

### Key Issues

Based upon the experiences and expectations of policy-makers and individual citizens, including persons with dual citizenship and persons with a multi-national background but holding only a single citizenship, the project is addressing:

1. How decision-makers may take a common European approach to dual citizenship that is acceptable at both national and international levels.
2. How international agreements and national documents upon which the attainment of dual citizenship and the politico-legal status of persons with dual citizenship are currently based and whether there is a need for any changes.
3. What role educational policies have in the promotion of inclusive and active citizenship and active civic participation among people with dual citizenship.

### Further Information

The full title of the project is: *Dual Citizenship, Governance and Education: a challenge to the European nation-state.*

The project started in December 2002. The final report is due at the beginning of 2006. Interim results will be available at the end of 2003.

The project web site at <http://www.joensuu.fi/dce/>

[Back to table of contents](#)

## Learning in Partnership: responding to the restructuring of the European steel and metal sector

### Research Institutions:

University of Leeds, United Kingdom

Steel Partnership Training, United Kingdom

Talentis, The Netherlands

Tietopalvelu Kayttotieto Oy, Finland

Sozialforschungsstelle Dortmund, Germany

Fundacion Primero de Mago, Spain

National Institute for Working Life, Sweden

Fafo Institute for Applied Social Research, Norway

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This project has been funded by DG-Research under the Key Action "Improving the Socio-Economic Knowledge Base" of FP5

### Context of the Research

The restructuring of key manufacturing sectors across Europe is continuing apace, as firms seek to respond to intense market imperatives. Nowhere is this more apparent than in the steel industry, where merger activity between companies and the closure of plants has increased. Thousands of workers have lost their jobs and those remaining face an increasingly uncertain future. Faced with this context, the employability of workers - in terms of retaining employment within existing companies or finding new employment - represents an important economic and social issue. Employability is a recognised pillar of the *European Employment Strategy* and a key aspect of the advancement of a *European Area for Lifelong Learning*.

The development of coherent strategies for employability and learning, in the context of corporate restructuring, is however a complex task. The European Commission's Communication document, *Making a European Area of Lifelong Learning a Reality*, identifies 'partnership working across the spectrum' (including employers, trade unions and other stakeholders) as a key 'building block' for the development and implementation of coherent and comprehensive lifelong learning strategies. Yet, currently there is an under developed understanding of the factors most likely to support and sustain such learning partnerships.

This project aims to assess how learning strategies and partnership-based approaches for learning can be utilised as a response to the on-going process of restructuring in the steel and metal sectors across Europe with a particular focus on Finland, Germany, Netherlands, Norway, Spain, Sweden and the United Kingdom.

### Initial Conclusions

The following initial conclusions have been identified relating to:

#### *Lifelong Learning*

1. Although discussions concerning lifelong learning are well advanced, there are still widespread concerns over its definition and problems over methods of implementation.
2. Governmental reviews or committees on lifelong learning have been established in most cases. These have resulted in a number of initiatives aimed at addressing the 'key priorities' outlined in the Commission's Communication, such as: valuing informal learning; improving information, guidance and counselling; improving learning opportunities and increasing investments in learning.
3. At the level of implementation, however, less progress has been made. Coherent national systems of lifelong learning, with clear linkages between education, training and learning throughout life still need to be fully established.

4. Responsibility for developing lifelong learning strategies is often unclear.
5. Policy discussions concerning definitions of lifelong learning tend to emphasise the responsibility of the individual from an economic perspective.
6. It is not clear that increased individual demand for learning in itself, will stimulate high skill, knowledge intensive economies and societies.
7. Lifelong learning systems planned and developed from “above” are less likely to be effective, since they are unlikely to connect with the realities of working life and the dynamics of the “new” economy.
8. However, “bottom-up” approaches aimed at implementing demand for learning amongst individuals can be particularly effective. Trade unions have an important role to play in facilitating bottom-up initiatives.

#### *Learning partnerships*

9. Initial analysis has identified three distinct types of learning partnership, although in practice they can relate to, build upon and influence each other. The partnerships are often led by trade unions, in co-operation with employers and other relevant economic agencies:
  - *Institutional* learning partnerships are based around strong traditions of national social dialogue and public policy consultation.
  - *Responsive* learning partnerships tend to evolve and be based around strong workplace mechanisms for social dialogue.
  - *Reactive* learning partnerships are multi-agency, ad-hoc arrangements typically geared towards rapid responses to crisis redundancy situations.
10. Trade unions engaged within learning partnerships have proved to be highly effective in engaging learners from non-traditional backgrounds that have had little experience of learning since the completion of formal schooling. However, such partnerships pose a series of challenges for trade unions, in terms of the skills capacities of local officials and their abilities to build-upon and sustain such initiatives.
11. The best examples of partnership-based approaches to learning in the steel and metal sector can help to inform the social partner response to the dynamics of restructuring that are likely to take place in the steel and metal sectors of Eastern Europe following enlargement.

#### *Restructuring of the European steel and metal sectors*

12. As the restructuring of the European steel and metal sectors is still continuing this has implications for the future shaping of the skills and learning requirements of employers and workers. This needs to be considered in the context of the interrelationship between learning strategies, broader production strategy and politics.

### **Initial Recommendations**

1. There is a need to strengthen the institutions and mechanisms of social dialogue over lifelong learning as it may be an important determinant in the implementation of coherent strategies for lifelong learning.
2. Resources should be directed towards developing bottom-up, partnership-based approaches in order to raise demand for learning. The UK experiences with trade union learning representatives may represent an initial model that could be piloted through projects in other countries.
3. Coherent support structures need to be developed and sustained for those workers made redundant from the steel and metal sectors. These support structures need to take account of the biographical experiences of redundant workers.

## Further Information

The project started in September 2001. The final report is due in September 2004.

The project web site at: <http://www.leeds.ac.uk/learning-in-partnership/>

## Key publications

### *Reports*

Greenwood, I. and Stuart, M., *Restructuring, Partnership and the Learning Agenda: A Review*, Learnpartner Monograph, Leeds. 68pp, ISBN 1-900840-19-7, 2002.

### *Articles in journals*

Skule, S., Stuart, M. & Nyen, T., 'Training and development in Norway', *International Journal of Training and Development*, 6(4): 263-276, 2002.

Wallis, E., 'Work-based project overcomes basic skills stigma', *Adults Learning*, 14(2); 24-28, 2002.

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Greenwood, I. And Stuart, M., 'Lifelong learning or lifelong flexibility? The case of the European Employment Strategy and the redefining of training', in Martinez Lucio, M. and Alonso, L.E. (eds), *Change and Conflict in a New Society: Discussing the Development of Post Fordism*. London, Routledge (forthcoming).

Svensson, L., 'Lifelong learning: a clash between production and learning logic', in Garsten, C. & Jacobbsson, K. (eds), *Lifelong Learning and Employability*, London, Palgrave (forthcoming).

Wallis, E. and Stuart, M., 'Trade Unions, Partnership and the Learning Agenda: Evidence from a 7 Country European Study', in Cooney, R. and Stuart, M. *Trade Unions and Training: Issues and International Perspectives*, Melbourne: Monash University, (Forthcoming).

[Back to table of contents](#)

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This project has been funded by DG-Research under the Key Action "Improving the Socio-Economic Knowledge Base" of FP5

**Context of the Research**

Education systems across Europe are changing in the way they are being regulated and how and who takes responsibility for their management. Equality of opportunity has continued to remain an important aspect of educational policy, however, changes in the way education systems operate could have an impact on inequality issues.

This research compares the development of public regulation of secondary education systems in five European countries and analyses how these developments affect local processes such as the creation of hierarchies, inequality and school segregation. It identifies regulatory modes for the variable and complex means by which public authorities orientate and coordinate action in a sector of society like state regulation, market mechanisms, communities, organisational hierarchy and networks.

The countries analysed are the UK (England), Belgium (French-speaking Community), France, Hungary and Portugal.

**Initial Conclusions**

These initial conclusions are mainly based on the comparison of five national education systems.

1. From the political perspective:
  - A crisis of some sort tends to push a State to reduce financial resources and to implement changes that adapt schools more to the requirements of the economy. Yet, at the same time there is an increased emphasis on reducing social exclusion.
  - There is also a tendency towards decentralisation of school management as well as more of a focus towards Europe.
2. Concerning regulation modes, it has been observed in most countries analysed that there is:
  - A reduction of the role of the central State in the direct provision of educational services.
  - An increasing trend for schools having to become more accountable in terms of results.
  - A weakening of the use of regulation strategies based on procedures that control the means of carrying out an activity. But, there is an increased use of regulation strategies based on achievement of results through assessment.
  - A reinforcement of new modes of control through the emergence of the State taking on an evaluation role.

### 3. Concerning inequalities it has been observed:

- A convergence of thinking on education systems and policies aiming to reduce inequalities. This has resulted in a greater focus on targeted measures aimed at creating more equality.
- There has been an evolution in education policies from a prevalence of political measures aiming for “equality of opportunities” using measures aiming for equal treatment through to a prevalence of political measures aiming at “equality of assets” that are achieved by differentiation of treatment.
- In several countries autonomy of the schools is favoured. This is resulting in a differentiation of the teaching practices as well as institutions having greater freedom to choose diverse methodology to address the individual needs of students.
- Institutional solutions to combat inequalities or the phenomena of exclusion are numerous and diversified from one country to another.
- Institutional solutions or models adopted by one country tend to diffuse into other countries. Currently a “mosaic” of the different policy measures exists across Europe.
- However, different public authorities have shown an ability to answer in a differentiated and even in an opposite way to similar situation according to the local characteristics of the situation.
- This is also resulting in “hybridisation phenomenon” with the coexistence of diverse, but sometimes contradictory institutional solutions. For example, the coexistence of a priority zone of education, but consisting of very selective courses, implying an underlying elitist logic.

4. Although still a very tentative conclusion, initial analysis seems to suggest that there isn't any direct link between the level inequality in the different countries and the degree of centralisation of education systems. Further analysis is still being conducted.

### Initial Recommendations

The local context needs to be carefully considered before a specific solution is adopted, as it has been observed that adopted solutions from other countries, do not necessarily have the same effect.

### Further Information

The full title of the project is: *Changes in regulation modes and social production of inequalities in education systems: a European comparison*. The final report is due in September 2004.

The project web site at <http://www.girsef.ucl.ac.be/europeanproject.htm>

Accessible from the web-site:

*Analyse des cadres institutionnels et autonomie des acteurs locaux : évolution des modes de régulation institutionnalisés dans les systèmes éducatifs étudiés. Rapports nationaux*, Mars 2002.

*Système éducatifs, mode de régulation et d'évaluation scolaire et politiques de lutte contre les inégalités en Angleterre, Belgique, France, Hongrie et au Portugal, synthèses des études de cas nationaux*, Septembre 2002.

*Iniquité scolaire: du/(des) concept(s) aux mesures. Premier essai à partir de PISA. Et examen des corrélations de ces indicateurs avec les mesures de ségrégation de publics et les indices d'autonomie des établissements*, Mai 2003.

## Key publications

Demailly, L., "L'évaluation, nouvel enjeu, nouvel outil" in *Nouveaux regards. Education, recherche, culture*, n°16 FSU, Paris, 2002.

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Maroy, C., "L'enseignement secondaire et ses enseignants", De Boeck, Université Collection Pédagogies en développement, Bruxelles, 2002.

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[Back to table of contents](#)

## **Summaries of research project clusters**



## Supporting ICT-related Learning Innovations in Schools

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### Context of the study

Information and communication technology (ICT) has the potential to enhance the education and training sector, but recent research activity in this area has shown that the teaching community involved in these research projects have found it difficult to embrace the results in their daily practices. This project examined the results of four previous ICT-related studies and aimed to provide a guide for teachers and schools to select educational designs and technology applications/solutions that are suited to their needs and therefore increase teachers' confidence in utilising research results in their everyday practice.

The innovative use of ICT in teaching/learning is a major research area actively supported by the European Commission under initiatives like Educational Multimedia Task Force, IST Programme, SOCRATES/MINERVA and e-Learning Initiative. Taking the results of four projects undertaken within these initiatives, this project has aimed to make the link between practice, research and decision-making. The recommendations are considered to be relevant to future policy-making by the European Commission as well as individual European Union Member States.

### Key Conclusions

The following key conclusions were reached:

1. Innovative use of ICT in teaching/learning can stimulate dynamic learning environments.
2. The effectiveness of ICT based innovations, scientific knowledge and/or new educational/pedagogic models relies on their successful integration into existing educational activities.
3. A working definition of ICT-related teaching/learning should focus on the activities of innovators who are integrating into existing activities or new activities, resulting in profound changes, reforms or improvements in teaching learning processes and outcomes. This includes existing or new:
  - ICT-based teaching/learning products
  - ICT-related educational/pedagogic theories and scientific research outcomes.
  - ICT-related institutional/organisational strategies and plans.
4. Teachers are the central figures for the cognitive, emotional and social development of their pupils in ICT-related teaching/learning. However, new models and the use of ICT have changed teachers roles.
5. The implementation of ICT in school teaching/learning has affected the distribution of roles/responsibilities and classroom interaction.
6. Regardless of their differing learning patrimonies and characteristics, schools still produce ICT teaching/learning innovations.

7. There are two main approaches for the conduct of ICT teaching /learning innovations. The first uses real life experiences and practitioners innovative ideas. This can be fully integrated into the whole school's development plans. The second enables the teachers involved in the research and development to support and initiate educational innovations, which can enhance research through:
  - Contributions to the design and methodology of research projects.
  - Tailoring situations for learning and research that are better suited to schools.
  - Expanding the anticipated uses of ICTs in education.
  - Insights into the strengths, limitations and suitability of research outputs in schools.
  - Localising the research outputs.
  - Disseminating results of the research to colleagues and throughout schools.
8. Many of the projects were less successful as they had no/too few teachers involved in their implementation stage and there was not whole school involvement in the design and evaluation stages. Also, teacher's language barriers' and heavy workloads affected the sharing of informal knowledge.
9. The sustainability of research and development driven innovations is threatened by:
  - The nature of research knowledge and practices.
  - Schools' attitudes towards research and development.
  - The links between researchers and schools.
  - The time spans of the projects.
  - The nature of research and development products.
10. The methods of reporting research (the publication of research papers, conferences etc...) limits the dissemination of new knowledge amongst school practitioners, as these methods are not considered important sources for teachers' professional development.
11. The acceptance of ICT-related teaching/learning innovations relies on regular access for teachers and pupils to up-to-date networked ICT.

## **Key Recommendations**

The following key recommendations were made:

1. Attention needs to be given to developing a supportive framework for ICT-related teaching/learning innovations.
2. The placement of ICT in school labs should also include efforts to bring ICT into regular classrooms and informal learning spaces. This will require the school to offer space that will support these flexible arrangements.
3. The number of teachers capable of using ICT applications needs to be increased.
4. There should be an acceleration in the implementation of policies that support teachers in developing relevant skills for ICT teaching/learning. Emphasis must be placed on the pedagogy behind the use of ICTs for teaching/learning.
5. Teacher training and professional development oriented policies should support ICT-related teaching models that encourage both pupils and teachers to play an active role in teaching/learning activities.
6. Policy reforms for teacher training should prioritise the adoption of new teaching/professional development models and the development of practical ICT-related skills that related to:
  - Collaboration
  - Curriculum and resources management.
  - Knowledge building.
  - Representation and sharing in semi-structured or open-ended ICT-based learning environments.
  - Pre-service teacher training with an emphasis on teachers going into secondary education.

7. Policy should encourage long-term networks between schools and research institutions/universities as these will help support schools in becoming learning organisations. However, reform is needed of existing curricula and assessment structures.
8. Teachers need to adopt, develop and support a pedagogic culture that develops supportive practises for pupils' and encourages own theories in teaching/learning activities. It should be linked to the development of life-long learning and professional practices that enable teachers to keep in touch with ICT developments, new knowledge and research on teaching/learning. Further scientific research is needed into this area.

**The full title of the cluster is:**

*Synergy between Practitioners' needs and opportunities, research orientations and decision making on the usage of ICT in primary and secondary education (SYPREDEM).*

**The Final Report of this cluster is available at:**

[http://www.cordis.lu/improving/socio-economic/res\\_clusters\\_edu.htm](http://www.cordis.lu/improving/socio-economic/res_clusters_edu.htm) (Cluster 4)

[Back to table of contents](#)

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This project cluster has been funded by DG-Research under the Key Action "Improving the Socio-Economic Knowledge Base" of FP5

### Context of the study

A large number of information and communication technology (ICT) - supported learning innovations have been funded by regional, national and European-based bodies over the last few years including some funded by the European Commission DG for Research under the Targeted Socio-Economic Research Programme (TSER) and the Joint Multimedia Call with a TSER component. However, little research appears to have been conducted on assessing the overall impact of these individual projects.

This project has aimed to optimise the results of these ICT-based learning projects by monitoring and reviewing the projects in order to identify key qualitative indicators of innovation and a new research agenda for future actions. This has been looked at from the following perspectives:

- New methodological approaches to learning in technology-based learning scenarios and their efficiency
- Institutional/organisational consequences, including cross-cultural issues to be solved
- Contribution of ICT to lifelong learning.

### Key Conclusions

The following conclusions were reached:

1. Engagement of ICT in learning alters traditional teacher-student relationships, and, as a result, there are changes in the roles of the principle educational actors.
2. Information management strategies take a more central role in learning that affect both knowledge building and the organisation of the classroom environment.
3. Change of organisation in the classroom appears to be caused by the combined effect of the media being used and the teaching approach being applied that of placing emphasis on the learning processes rather than the outcomes, and on social learning rather than individual learning.
4. Strategies are oriented towards:
  - Collaborative learning;
  - Project-based learning;
  - Self learning;
  - Communicative strategies to learning.
5. Teachers' attitudes towards ICT are connected to socio-cultural, professional and technological barriers.
6. Effective implementation of ICT in learning requires that institutional changes to be addressed by all responsible actors. It is necessary to consider the following:

- Development of a culture of collaboration amongst all actors (teachers, students, administrators);
  - Flexibility of curriculum;
  - The perception of ICT as a window of opportunities for institutional development;
  - Cost-effectiveness,
  - Wider access of educational opportunities offered by ICT,
  - Organisational factors such as institutional barriers need to be considered.
7. A fully embedded innovation within on-going institutional interventions is most likely to be successful and staff training is crucial to the success of innovations.
  8. Parameters for designing teacher-training schemes are more conducive to the ICT-based learning innovations' requirements.
  9. ICT-based innovation in learning:
    - Enhances student-centred learning approaches;
    - Facilitates the transformation of teachers traditional roles and functions;
    - Shifts towards more collaborative and participative forms of learning;
    - Promotes new competencies required for improving teaching and learning
  10. An agenda for policy articulation in the field of learning innovations with ICT ought to focus in the areas of:
    - Equal access to educational opportunities;
    - Cross institutional co-operation;
    - Institutional transformation;
    - Organisation issues regarding the educational praxis;
    - Knowledge sharing and knowledge negotiation mechanisms;
    - School organisation and curricula development;
    - Provisions for learning on demand;
    - Teacher's professional development;
    - Provisions for support to the educational actors;
    - Knowledge dependencies and gender issues;
    - Lifelong learning policies

## **Key Recommendations**

The following recommendations were made for future research:

1. Support studies for developing pedagogies for learning in the knowledge society, with the focus on the management of cross-cultural and linguistic issues in the framework of a European education space (e.g. transregional/transnational joint courses and/or learning materials development, transnational joint-student support, transnational collaborative learning, layered approaches of learning platforms).
2. Support research that pays attention to the emotional aspects of learning in ICT-based environments, like the extent to which social and learning skills, self-managing skills, and other meta-cognitive capabilities are developed.
3. There should be studies in emerging new competencies, skills and meta-skills of teachers, tutors and other academic staff (as well as managers) for e-learning.
4. There is a need for in-depth study of people's information seeking strategies in ICT-based learning situations and its relation to the building of knowledge.
5. At the strategic level, there should be longitudinal studies to investigate the sustainability and scalability of the recently introduced learning innovations, like the learning effects arising from learning with ICT (such as learning in new scenarios combining face-to-face and virtual learning), changing habits of study, new assessment components, long-term teaching effects, and promotion of the notion of "classroom observatory" type of activities.

6. There is need to address the lack of rich evidence on the issues of equity, exclusion and gender. Some fundamental questions are related to how we can handle new forms of exclusion as a consequence of the level of education and limited access to technologies of electronic transmission information; and to what the pedagogical factors are that inhibit /promote social exclusion.
7. The rhetoric of European lifelong learning needs to be made more concrete by:
  - Bridging the gap between theory and practice across the different sectors (and different 'learning patrimonies') of learning;
  - Developing a knowledge base on 'what works, for whom and under what conditions', with particular regard to the use of virtual learning (e-learning) in education and training;
  - Consolidating knowledge on new ways of promoting social inclusion (e-inclusion) and integrating social inclusion policies with education and training policies more effectively.

**The full title of the project is:** *Monitoring and Evaluation of Research in Learning Innovations(MERLIN)*.

**The Final Report of this project cluster is available at:**

[http://www.cordis.lu/improving/socio-economic/res\\_clusters\\_edu.htm](http://www.cordis.lu/improving/socio-economic/res_clusters_edu.htm) (Cluster 3).

### **Key Publications**

Barajas M. (ed.), *Socio-cultural Perspectives of Learning Innovations with ICT*, UB Publications, Barcelona, 2003.

*Improving learning through technology: Opportunities for all*, Presentation at the PROMETEUS Paris Conference, September 2002. PowerPoint presentation and paper are available at <http://www.prometeus.org/index.cfm?PID=364>

[Back to table of contents](#)

## Towards the Learning Economy: conclusions from FP4 and FP5 projects to shape European policies in education and training

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This project cluster has been funded by DG-Research under the Key Action "Improving the Socio-Economic Knowledge Base" of FP5

### Context

A key aim of the European Council, the European Commission as well as many national and political stakeholders is to actively change Europe into a "Learning Society", a "Learning Economy" or a "Knowledge Based Economy". It is widely believed that only by making 'lifelong learning' a reality for European citizens can individual and regional competitiveness be ensured. Therefore such a move towards a 'Learning Society' has far reaching economic, political and social implications.

This project has established an education and training "cluster" to investigate these implications, especially with regard to learning policies and education and training practice, by valorising past and present EU research projects in the field of education and training from this perspective.

### Key Objectives

The objectives of the Cluster are to:

- Evaluate the outcomes of previous and present European socio-economic research projects in the field of education and training (funded under the European Commission IV and V Framework Programmes) with respect to the Learning Society debate.
- Initiate a European and international dialogue among different research disciplines related to the issue of learning in learning economies/learning societies.
- Critically review the scientific debate, concepts and research relating to issues of learning economies/learning societies.
- Initiate a dialogue with practitioners and policy makers in related fields in order to arrive at conclusions for European education and training policies.

### Key Results

The project finished at the end of July 2003. A number of workshop reports have been produced:

- ✓ "Learning in learning economies -A critical debate on learning economy theories, discussion of E&T cluster valorisation measures (Workshop One, September 2001).
- ✓ "New contents of skills and knowledge" (Workshop Two, February 2002).
- ✓ "Learning and information and communication technologies" (Workshop Three, May 2002)
- ✓ "Living, working and learning in the learning society -the perspective of the learning citizen in EU funded research" (Workshop Four, February 2003).

Based on the project's final conference "The learning citizen in EU-research" (May 2003), two reports will be produced covering the key issues for policy makers and for research workers.

### The results of this project are available at the project web site:

<http://www.learningcitizen.uni-bremen.de/index.php>

[Back to table of contents](#)

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**Context of the study**

Various regional and national government agencies and the European Community are actively supporting developments and policies that combat social exclusion and will boost the further development of regional and European economies. However, social exclusion and unequal opportunities in education can occur at any time throughout an individual's life. Therefore, the scope of this project ranges from early childhood education to the training of older workers and university education.

Social exclusion in education is the subject of various "Targeted Socio-Economic Research Programme" (TSER) funded projects under the European Fourth Framework Programme. The aim of this project was to review twenty projects that related to the issue of 'Education, Equality and Social Exclusion' in order to create a wider body of knowledge and consensus in the area. This project group conclusions and recommendations around four themes.

**Key Conclusions***Effect of pre-school and early childhood education*

1. Positive outcomes of pre-school and early childhood education programmes are affected by timing, intensity, duration, professionalism of the staff, low staff/pupil ratios and intellectually rich and broad curricula.
2. Yet after some years, the positive effects were eroded for the educationally disadvantaged children, as their primary schools' pedagogical/didactical principles did not match some children's specific needs.
3. New perspectives for research emerged which focused on interaction, transaction, self-regulation, co-regulation, cognitive development and co-constructed skills. These can be transferred from early literacy teaching and learning to primary schools and teacher-training.
4. Generally, investments in early childhood interventions are highly cost-effective.
5. The pre-school/early school period is when fundamental linguistic, cognitive and socio-emotional skills are developed. Increased understanding of these developmental processes is important for the design of early childhood interventions and relevant to the teaching/learning strategies of compulsory education.
6. School effectiveness research has:
  - Discovered unequal opportunities in compulsory education/education are a persistent and evolving problem.
  - Found that adequate resources are important for school effectiveness.
  - Recognised that organisation curricula and instructional levels should be similar.
7. A learning model that encourages students to develop their own learning and competency processes, whilst incorporating teachers/trainers and students learning theories and interpretation, can be more appropriate for the acquisition of skills and could make learning appealing for different groups.

8. Compensation programmes/schemes have been designed to combat inequality in education, but evaluation studies are scarce. The effects of these are small but in sophisticated cases, significant.
9. Educational priority areas were considered not successful, due to disagreements over the strategy of allocating additional resources to “difficult-to-define” areas, and the unacceptable acknowledgement that segregation at school level is inevitable.
10. Segregation in education is often linked to segregation in housing, labour, civic and political participation.

#### *New Governance Models for Education & Training: Decentralisation & Marketisation*

1. There is a tendency towards deregulation and decentralisation in education & training with the main reasons for this being:
  - The awareness that complex legislation/prescriptive regulations do not produce the expected outcomes.
  - Dissatisfaction with the performance of public institutions/services and the redefinition of the governmental role.
  - Increasing individualisation and demand for diversification in public/private services and goods.
  - Budgetary constraints that question the size of the government/public service and the welfare state.
2. Current policy anticipates that increased autonomy for education and training institutions will increase quality, efficiency, and accountability, and reduce bureaucracy.
3. Introducing market mechanisms to education and training did not affect the decentralisation and marketisation in education but adversely affected educationally disadvantaged groups.
4. Some research exposed the fear that further marketisation of education will increase educational inequality and social exclusion. However, the outcomes of other research showed that a market-oriented approach could lead to productive tensions and opportunities for innovation. But, it also indicates that teachers’ positions have become eroded, which had led to severe de-motivation and hindered pedagogical innovations.

#### *School-to-Work Transitions*

1. The period between school-to-work transitions has been extended whilst at the same time many young people are immersed in the world of work at an earlier age, combining studies with part-time or holiday jobs.
2. There are various “pathways” through education and into the labour market, which consist of a particular sequence of linked programmes. However, although policy makers can design these “pathways” students can choose their own route that may not conform to the intended route.
3. International comparative research shows that institutional arrangements around school-to-work transitions and the quality of links between schools and work do influence the transitional process.
4. The chance of obtaining skilled employment is increased by specific secondary vocational education systems, In fact, for countries with a strongly occupational focused labour market, the transitional process is smoother and initial employment is more stable.
5. However, entry to the labour market is much harder for the low qualified who are more susceptible to economic swings.
6. Educational opportunities that are not taken up during adolescence have a severe impact on later career stages.
7. Some research found that whilst young adults who did apprenticeships gained faster entry to the labour market, their position and wages could be less favourable than graduates of upper secondary schools/full-time vocational schools.
8. The role and status of apprenticeship schemes and employers perceptions of these schemes could explain this contrast, as in countries with well established scheme there is have little or no differences between the wages and position of apprentices.
9. Some research has found that some students struggle to choose an option from the multitude of opportunities they have to consider. In addition, some students struggle to develop an identity that matches present developments in the labour market, which can lead to disorientated and marginalized young adults.

10. The emphasis of teachers and trainer would be on coaching students to develop their own learning and competency processes, which incorporate teachers/trainers and students learning theories and interpretations.
11. Effective teaching/learning for upper secondary (vocational) education is changing as there:
  - Is increased understanding of learning processes.
  - Is a more constructive approach towards teaching and learning.
  - Are changes to the labour market.
  - Are new demands on workers.

#### *Labour Markets, Employability and Lifelong Learning*

1. The mutually beneficial nature of training means that there is a funding confusion between employees, who pay for general training and employers, who pay for specific training.
2. The “at risk” groups for lifelong learning are:
  - The low skilled /low qualified.
  - Older workers.
  - The unemployed.
  - Ethnic minorities.
  - People re-entering the labour market.
  - Employees of SMEs.
3. Each group can face different problems but the lack of transparency in the training market and fears about returns on investment effects them all. Lack of work is another barrier for the low skilled /low qualified, the unemployed and re-entrants the labour market.
4. SMEs have additional problems with training for employees as:
  - There is a lack of expertise in training and developing training policies.
  - They have to replace employees who are on training courses.
  - They have limited financial resources for training.
5. Overall, poorly qualified members of the workforce have least chance of participating in training and their labour market position is continuing to deteriorate. This could lead to marginalisation and unemployment.
6. The characteristics of effective training programmes for the unemployed are:
  - Relatively small-scale programmes aimed at particular target groups and local/regional labour demands.
  - A practical training component, particularly in an enterprise.
  - Sufficient guidance and counselling throughout.
  - Training in job search skills.
7. However, training providers tend to favour candidates who are most likely to find jobs afterwards, particularly if their funding is based on the number of candidates who find work. Therefore the most vulnerable have little chance of receiving training or reintegrating into working life.

### **Key Recommendations**

The study made the following recommendations in four main areas of study:

#### *Effect of pre-school and early childhood education*

1. More research is needed into the interaction of the pre-school programmes characteristics, the children’s characteristics and the context in which such programmes are carried out.
2. Further research methods and strategies are required for bilingual development and second language learning. An approach that emphasises the comparative function of language has been supported by research so far.
3. Further investigation is needed on how different skill development “pathways” can be supported from a pedagogical/ didactic perspective.
4. Compulsory education must reconcile the contradictory goals of promoting equality, producing excellence and increasing efficiency.

5. Combating segregation at school level is problematic, as “better” schools tend to select better performing/more able pupils and schools in ‘bad areas’ tend to perform below average, even if they are controlled for the background characteristics of the pupil population. Further research is needed on this subject.

#### *School-to-Work Transitions*

1. Fundamental to the organisation of effective school-to-work transitions are: -
  - The involvement of key stakeholders, particularly employers.
  - Opportunities for training in a work context.
  - Well-organised guidelines/counselling facilities.
  - Safety nets for those at risk.
2. To ensure these safety nets work, there should be: -
  - A close connection with the local labour market.
  - Training that is targeted towards employers needs.
  - An appropriate mix of school/work based learning.
  - Substantial career guidance and counselling.
  - Co-ordination between support services and “pathways”.
  - Co-ordination between pedagogical/didactic approaches for different target groups learning styles, preferences and capacities.
3. A balance between instrumental, social and biographical skills is needed for effective training provisions.
4. Providing young adults with appropriate education and training opportunities requires: -
  - Education and training institutions to open up and become part of networks that include labour organisations and socio-cultural institutions.
  - Flexible programmes/activities that resemble working life and cater for the differences in young adults learning culture.
  - Professionalism from staff who can assume various roles i.e. coach, tutor, instructor, counsellor.
  - Staff who can continually tailor training to suit young adults’ possibilities, capacities, preferences, problems and limitations.
5. Further research is needed into employers’ recruitment processes and the role of qualifications play in these processes.

#### *Labour Markets, Employability and Lifelong Learning*

1. Institutions are required that enable people to combine different income sources to fund the training necessary for a transitional labour market.
2. Further investigation is needed into the multiple transitions between different labour market segments and labour market concepts.

## Overall recommendations

1. New perspectives for further research are:

- An institutionalist and evolutionary approach to inequality/social exclusion in education and training.
- The need for further diversity in “pathways”, particularly regarding demand led tailor-made solutions.
- Analysis of standards setting in education and training, with an emphasis on balancing the interests of different stakeholders and the most vulnerable groups.
- New governance models with integrative provisions.
- Analysis of production/measurement of human capital, with an emphasis on the effects of informal/non-formal learning and non-monetary returns.
- Through analysis into the implications of the emerging learning economy for the least qualified and the necessity/possibility of defining a minimum learning platform.
- The role of social capital inclusion/exclusion in education and training.

**The Final Report of this project cluster is available at:**

[http://www.cordis.lu/improving/socio-economic/res\\_clusters\\_edu.htm](http://www.cordis.lu/improving/socio-economic/res_clusters_edu.htm) (Cluster 2).

## Key Publications

Brandsma, J., “The Learning Economy: Implications for the least qualified”, in Mayer & Lassnigg (eds.), *Education and skills for the learning economy*, Heidelberg, Springer Verlag, 2003.

Brandsma, J., “Assistant training. Safety net or labour market preparation?”, *European Journal Vocational Training*, II, pp.70-78, May-August 2002.

[Back to table of contents](#)

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### Context of the study

The relationship between education and employment, and school-to-work transitions has been the subject of substantial research over the last decade and has formed a large part of the European Union's 5<sup>th</sup> Framework Programme. High unemployment rates for youths have caused concern for twenty years, leading researchers and policy-makers to focus on the school-to-work transition stage of young people's lives.

This project aimed to summarise the outcomes of previous research projects that address the issues relating to school-to-work transitions. It highlights areas for new and further research.

### Key Conclusions

The following key conclusions were reached:

1. Over the last 20 years, most educational changes in the workforce are due to rapid technological and autonomous educational changes. Although technological change is one of the main factors, autonomous educational change (due to other factors) is almost equally as important.
2. Most educational change in the labour market occurs within occupational groups not between them. In many occupational/industrial settings educational change may come first and then technical change is facilitated. However, within certain occupational/industrial groups technical change appears to be the main driver.
3. There are extensive differences between national, industrial and company specific regimes in structuring their education/training and new technology relationships.
4. Evidence suggests that global economic and technological change processes do not necessarily operate in the same way and with the same effects in different national/institutional regimes.
5. There is a close relationship between levels of education, employment chances and level of occupation achieved across most EU national-institutional systems.
6. It was found that continuing re-assessment is needed for assessing changing national objectives, strategies, content and the outcomes of educational interventions with results/conclusions not necessarily applicable throughout Europe.
7. The effectiveness of most youth training/employment schemes for the least qualified is in question, as employers still appear to favour those with better qualifications. Therefore, future policy should focus more on the necessity to bring qualifications up to minimum threshold levels (legitimised by employers or labour market needs) as well as addressing the individual educational/developmental needs of clients.
8. It would be beneficial if future research priority policy objectives addressed youth educational/training and employment exclusion/inequality.
9. Cost-benefit analyses frequently neglect social, social psychological and educational outcomes of intervention, with perhaps too much attention on efficiency and too little on equity.

10. There are no comprehensive and effective theoretical/conceptual models for interventions on school-to-working transitions.
11. Research on school-to-working transitions has tended to concentrate on job searches and the probability of getting a job. Important areas of study include:
  - ✓ Length and difficulty of job search.
  - ✓ Quality of the job match – status, wages, mobility chances.
12. The following issues of school-to-working transitions require more research:
  - ✓ The returns on education i.e. occupation/earnings.
  - ✓ Different types/levels of education/training.
  - ✓ Migration and job searches.
  - ✓ Guidance and counselling.
  - ✓ Movement out of the labour market, in relation to new household formation i.e. housing changes, marriage arrangements.
  - ✓ Minimum wages, legislation and unemployment benefit.

## Key Recommendations

The following recommendations were made:

1. High quality comparative research is urgently needed into:
  - ✓ The relationships between rapid technological change, economic/occupational change, wider social change and changes in the provision of education/training.
  - ✓ The effects of global economic/technological forces on countries / systems.
  - ✓ The impact of constantly upgrading the educational/training qualifications for labour market entrants at a faster rate than occupational / technological changes necessitate; or the extent to which rapid educational change facilitates subsequent technological change.
2. Suggested improvements for future research include:
  - ✓ More cross-fertilisation between socio-economic research projects.
  - ✓ Improvements in comparative conceptual / theoretical and methodological frameworks.
  - ✓ The wider use of more sophisticated models in different comparative research.
  - ✓ The wider availability of Eurostat micro/meso data.
3. The way technical and educational changes are related to companies and industrial strategies for

the adaptation of technical and market changes should to be central to future research.

4. New development models and economic / employment growth needs further examination from a national perspective across the European Union.
5. Equality of opportunity, including educational and labour market exclusion is only partially open to national policy interventions and is sensitive to economic/technological change. It is also sensitive to the way national education/training systems provide opportunities for initial and continuing re-education/training. More sophisticated comparative research into this area is needed.
6. A comparative European database on relevant central policy/research issues is necessary to facilitate new work. However, availability of such databases (e.g. by Eurostat) to the research/policy analysis community needs to be significantly expanded.
7. Filling the gap in the theory and research applied to interventions on school-to-working transitions should be a priority issue for future research.
8. The compilation of comparative data on school-to-work transitions should ideally begin at the end of lower secondary level education and continue for the first 5-6 years of an individual entering in the labour market.
9. EU strategies should also ensure that data is relevant in a European context by:
  - ✓ Maximising the cross-national comparability of current national and international surveys on relevant issues
  - ✓ Creating new policy/research data sources for priority areas.
  - ✓ Comprehensively analysing current and projected surveys.
  - ✓ Determining areas where important data is missing or non-comparable.
10. The cost of replacing inadequate or missing data could be minimised by:
  - ✓ Only carrying out individual national surveys every 3 to 5 years.
  - ✓ EU Sharing of costs of national surveys to increase the comparability of similar surveys currently being carried out by EU countries.
11. Sample sizes for cross-country comparable data collection need to be increased but less costly survey approaches should be devised i.e. telephone interviews, improved mail

questionnaire approaches to increase response rates.

12. The suitability and depth of surveys / questionnaires are crucial to effective data collection. Therefore, researchers should anticipate the future issues their study will highlight.
13. The absence of comparable family background, schooling processes and outcome variables in some national surveys needs to be addressed.
14. European comparative research is needed into lifelong learning and related issues.
15. There is a substantial 'overlap' of educational levels i.e. the over-qualification of workers or the under-utilising of employers' education/skills. More detailed research is needed in the varying nature of these 'overlaps' and their effect on:
  - ✓ Labour market flexibility,
  - ✓ Labour productivity and turnover,
  - ✓ Employment exclusionary processes.
16. Further cross-national research is needed in order to better understand the extent to which occupational changes/upgrading shape the educational / training requirements.
17. A detailed study is needed into the effect on industry/firms of increasingly better-qualified workforce entrants, with particular emphasis on the nature and extent of productivity growth and effective responses to organisational / technological changes.
18. There is evidence that educational/training qualifications can offer informal or implicit skills for employment. Comparative research is needed into all the potential skills to be gained from educational/training qualifications and their interpretation by employers.
19. The effectiveness of youth training/employment schemes must be comparatively evaluated in different EU countries.
20. More applicable measures of the employers' selection bias for youth training/employment schemes need to be developed and evaluated in comparative cross-national work.
21. The effect of Europe lowering the wages of low-qualified young people or increasing their skills through training needs further research, with an emphasis on the effect of similar policies on different national/institutional contexts.
22. Evaluation studies should aim to widen their outcomes as employment/training issues cover a broad spectrum.

**Full title of the activity:**

*Education and Labour Market Changes: the dynamics of education to work transitions in Europe*

**The report of this activity is available at:**

[http://www.cordis.lu/improving/socio-economic/res\\_clusters\\_edu.htm](http://www.cordis.lu/improving/socio-economic/res_clusters_edu.htm) (Cluster 1).

[Back to table of contents](#)

## Index

- access to university, 27, 170
- access, 27, 170
- accountability, 24, 88,
- active citizens, 133, 171
- active civic participation, 133, 171, 176
- admissions policies, 11
- adult students, 27,
- apprenticeship schemes, 193
- assessment, 30
- barriers to mobility, 12
- barriers to participation, 27
- biology, 17
- candidate countries, 170
- chemical industry, 144
- chemistry, 17
- child development, 48
- child immigration, 55
- choice biographies, 153
- citizenship education, 133
- citizenship, 176
- civil society organisations, 135
- competence audit regime, 165
- competencies, 45, 69
- continuing VET, 166
- corporate learning, 86
- cross-curricular competencies, 90
- cultural diversity, 9
- cultural minorities, 171
- culturally responsive education, 9
- decentralisation, 115, 160, 193
- delinquency, 55
- deregulation, 115, 193
- disability, 134, 170
- discrimination, 46, 122
- distribution of earnings, 118
- drop out rates, 56
- early child care, 51
- Early Childhood Programme, 48
- early educational failure, 52, 53
- early literacy, 35
- education and employment, 61, 103, 105, 197
- education and the labour market, 103, 121
- education and social exclusion, 2
- education expansion, 103,
- education governance, 1, 115, 160
- educational innovations, 24
- educational performance, 30
- educational policy, 115, 160, 168
- educational software, 99,
- educational technology, 99,
- education-to-work, transitions, 32, 195, 197, 153, 154
- effective school improvement, 89
- effectiveness, 30
- employability, 61, 194, 158, 166, 169
- employer recruitment, 53
- employment, 80
- epistemological objectives, 18
- equal opportunities, 192, 156, 158
- ethnic minorities, 149
- ethnicity, 53, 134
- European Community Labour Force Survey, 52
- european dimension, 79
- European Employment Strategy, 177
- European integration, 168, 169, 170
- European steel and metal sector, 177
- europeanisation, 175
- evaluation, universities, 19
- exclusion from education, 24, 169
- external evaluation, 19, 88, 161
- Fourth Framework Programme, 1, 7
- Fifth Framework Programme, 1, 5, 131
- Sixth Framework Programme, 2
- gender autonomy, 137
- gender, 46, 53, 134, 136, 156, 170
- globalisation, 168, 175
- governance, 1, 176
- graduate employment, 32
- guidance and counselling, 37, 177
- gypsy, 171
- health, 55
- high skilled workers, 41
- higher education and the economy, relationship, 21
- higher education, 1, 11, 21, 22, 112, 170, 175
- higher education, economic role, 21
- higher education, national policies, 21
- housing, 55
- human resource development, 74
- ICT in education, 2, 25, 99, 185, 188
- ICT in higher education, 25
- illness, 57
- immigration and the labour market, 121
- immigration, 9, 55, 122, 149
- inequalities, 53, 193
- inequality and training, 118
- inequality in earnings, 92
- informal learning, 135, 153, 177
- informal learning, recognition, 153, 165
- informal training, 60
- Inspectorate, 161
- integration, 122
- intercultural, 57
- internal evaluation, 19
- internationalisation, 175
- IT in science, 109
- job search training, 38
- key competencies, 136
- labour market oriented training, 39
- labwork, 17
- language policies, 149
- language skills, 123
- language, 149
- learning at work, 69, 70, 97, 138
- learning citizen, 191, 168
- learning companies, 96, 144
- learning economy, 191
- learning in organisations, 80, 97
- learning innovations, 24
- learning objectives, 18
- learning organisation, 64, 70, 72, 74, 144

learning partnerships, 178  
 learning patrimony, 24  
 learning society, 169  
 legal framework, 160  
 lifelong learning policies, 67, 178  
 lifelong learning, 66, 74, 194, 170, 177  
 lifelong learning, funding, 77  
 lifelong learning, universities, 66, 68  
 literacy teaching, 35  
 long-term unemployed, training, 37  
 low skilled workers, 41  
 low-skilled labour, 41, 45  
 marginalisation of immigrants, 122  
 marginalised groups, 35, 122  
 market mechanisms, 59, 88, 193  
 marketisation, 1, 193  
 migration policy, 123  
 migration, 121  
 minimum learning platform, 42  
 minority languages, 149  
 mortality rates, 55  
 multicultural society, 57  
 multilingualism, 150  
 newsletters, 5  
 non-traditional students, 27  
 objectives of education, 66  
 occupational identities, 80, 163  
 older workers, 69, 72  
 organisational learning, 63, 86, 144  
 pathways, 193  
 physics, 17  
 political mobilisation, 149  
 poverty, 55, 57  
 pre-school care, 48  
 project clusters, 5  
 psychological barriers to training, 38  
 public financial support, 92  
 qualifications, 104, 136  
 quality of instruction, 88  
 race, 46,  
 racism, 171  
 recognition of qualifications, 12  
 return migration, 122  
 returns on education, 92  
 risk biographies, 153  
 risk of social exclusion, 55  
 roma, 171  
 school autonomy, 88  
 school effectiveness, 87  
 school improvement, 87  
 school improvement, external agents, 88  
 school improvement, financial resources, 88  
 school to work research, 59, 60  
 schooling and training, economic perspectives, 59  
 school-to school, transitions, 1, 52, 59, 193  
 science education, 17, 107  
 science teacher training, 107  
 science teachers, 107  
 science teaching, 107  
 scientific literacy, 107  
 segregation, 193  
 self-evaluation, 161  
 sexuality, 134  
 skill accreditation mechanisms, 81  
 skills and social exclusion, 82  
 skills and wages, 118  
 skills gaps, assessment, 81  
 skills, supply and demand, 104, 118  
 smartcards, 83  
 SME clusters, 64  
 SMEs, 63, 69, 72, 84, 194  
 SMEs, competitiveness, 84  
 social class, 53  
 social disadvantage, 24  
 social exclusion of women, 156  
 social exclusion, 2, 27, 55, 115, 122, 192, 193, 133  
 social inequality, 153  
 social integration, 149  
 socially excluded groups, 27, 82  
 socio-vocational inclusion, 165  
 soft skills and competencies, 81  
 student mobility, 11, 159  
 teacher education, 127  
 teacher training, 9, 127  
 teacher/parent relationships, 48  
 tele-guidance, 127  
 trade unions, 178  
 training programmes, 37  
 TSER, 7  
 unemployed youth, 45  
 university access policies, 27  
 university-industry, relationships, 25  
 virtual learning environments, 112  
 vocational education and training, 37, 79, 80, 144  
 vocational guidance, 153  
 vocational training systems, 52  
 wage inequality, 93, 122, 174  
 women's employability, 156  
 women's studies, 156  
 work-based training, 41, 70  
 working identities, 45  
 work-related identities, 163  
 work-related training, 62  
 work-to-work, transitions, 59  
 young adults, 45  
 youth policies, 153  
 youth training schemes, 197

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