1. Basic Information

1.1. CRIS Number: 2003/004-938-17
1.2. Title: Life-Long Learning
1.3. Sector: Economic and Social Cohesion
1.4. Location: Slovenia

2. Objectives

2.1. Overall Objective(s)

The overall objective of the project is to raise the level of lifelong learning culture in Slovenia by assuring quality, relevancy and accessibility of education, training and counselling as key elements of life-long learning policy, with the aim of improving knowledge, skills and competencies within a personal, civic, social and/or employment-related perspective.

Improvements of the system will have positive effects on the participation in learning activities, with the four broad and mutually supporting objectives: personal fulfilment, active citizenship, social inclusion and employability/adaptability, and thus contribute to the NDP-RS 2001-2006 strategic aim of assuring a balanced and sustainable economic and social development of Slovenia in the context of its accession to the EU.

2.2. Project Purpose

The project purpose is to test institutional capacities and mechanisms for the management of structural type of measures within the European Social fund policy field c: «Promoting and improving training, education and counselling, as part of lifelong learning policy to facilitate and improve access to, and integration into, the labour market, improve and maintain employability, and promote job mobility».

Based on the RS National Development Programme (NDP-RS 2001-2006, December 2001) measure 2.1.d Design and development of systems to promote Lifelong Learning, the project will focus on activities aiming at improving education and training supply for young and adults, in order to give them skills and knowledge necessary to function at work and in society, marked by the processes of globalisation, rapid technological development and EU integration.

It is expected that improvements of education and training systems will have an important positive effect on the quality of initial education, and as such represent also a broader background to preventive actions aiming at reducing the number of young people who drop out of school, increasing attractiveness of training programmes to the young as well as employed and unemployed adults and facilitate more flexible transition between learning and work in both directions.
2.3. Contribution to the Accession Partnership and NPAA priority

The proposed project is in full conformity with the short term and medium term priorities of the AP Slovenia:

Regional policy and co-ordination of structural instruments

In particular:

- Establish a clear division of responsibilities for the management of Structural Funds and the Cohesion Fund, improve the administrative capacity of the institutions involved in the implementation of the funds
- Set up the required monitoring and evaluation systems for Structural Funds
- Develop the technical preparation of projects eligible to the Structural and Cohesion Funds assistance (project pipeline)

In the context of the acquis related to the Community employment and social inclusion policies, and the European Social Fund as the main instrument for their implementation (Treaty, Articles 2, 13 and 21), the project relates to the

(i) Employment Guidelines 2002, stating that (C) “Member States shall develop comprehensive and coherent strategies for Lifelong Learning, in order to help acquire and update the skills needed to cope with economic and social changes throughout the entire life cycle. In particular, the strategies should cover the development of systems for initial, secondary and tertiary education, further education and vocational training for youth, people and adults to improve their employability, adaptability and skills, as well as their participation in the knowledge-based society (…)”.

(1st pillar Improving employability, p. 4 Developing skills for the new labour market in the context of Lifelong Learning)

“Member States are therefore called upon to improve the quality of their education and training systems, as well as the relevant curricula, including the provision of appropriate guidance in the context of both initial training and lifelong learning, the modernisation and greater effectiveness of apprenticeship systems and of in-work training, and promote the development of multi-purpose local learning centres (…)”

(ii) Joint Assessment of the Policy Employment Priorities (SLO-EC 2000) and the Conclusions of the JAP follow-up seminar in Slovenia (Ljubljana, 20 February 2001)

“4. Chapter on the responsiveness of the VET system to Labour market needs, in particular
- Low education attainment of the population
- High drop-out rates from lower and secondary vocational training programs
- Link between education (specialization) and the needs of the labour market has to be improved
- Reduction of curriculum mono-culture
- Life-long learning – increase of the participation rate

(iii) European Social Fund policy field c for “promoting and improving training, education and counselling, as part of lifelong learning policy to facilitate and improve access to, and integration into, the labour market, improve and maintain employability, and promote job mobility”.

Reference to the Action Plan

Chapter 21. Regional Policy and co-ordination of structural instruments

Establish a clear division of responsibilities for the management of the Structural Funds and the Cohesion Funds, improve the administrative capacity of the institutions involved in the implementation of the funds, in particular the Managing and Paying authorities, especially in terms of recruitment and training; ensure effective inter-ministerial co-ordination.

Set-up the required monitoring and evaluation systems for Structural Funds.

Align with the specific management and control provisions for future Structural and Cohesion Funds under the relevant EC regulations.

Develop the technical preparation of projects eligible to the Structural and Cohesion Funds assistance (project pipeline).

The proposed project is in full conformity with the NPAA field of:

Education, training and youth

“Slovenia continues with the activities that are included as priorities in the NPAA: human resources development, raising educational quality, measures promoting the European dimension in all fields, and life-long learning.

In the next decade, Slovenia will give priority to those objectives that were adopted by the European Commission in its guidelines and action programme in compliance with the Lisbon Summit conclusions. Slovenia is already actively participating in joint European activities targeting an increase in quality and efficiency, openness and cooperation in the field of education and the recognition of the importance of life-long learning.”

Slovenia is committed to the strategic goals European Union has set itself in education and training to be achieved by 2010 and to future objectives associated with them. The Ministry of education, science and sport has appointed experts to working groups nominated to report on the progress in carrying out the future objectives set by the Stockholm summit and approved by the Barcelona meeting.

2.4. Contribution to National Development Plan 2001-2006 (NDP-RS 2001-2006,
December 2001)

The project responds to the NDP-RS 2001-2006 Chapter 3: Analysis and Development Scenario: 3.2. Preconditions for the transformation into knowledge-based society, 3.2.3. Human resource development: particularly 3.2.3.2. Education and Training (p. 69 - p.71):

**Education system and programs**

*Despite an extensive network of education and training institutions, the range of educational programmes does not follow fast enough the new demand for modern methods of training and re-training of active labour force and certification of professional qualification.*

(*...*)

*Adjustments of educational programmes and curricula are even more important in areas of special public interest, such as environment, health, culture, foreign languages, information technology, telecommunications, entrepreneurship and agriculture.*

(*...*)

*Inter-institutional and inter-ministerial co-ordination at national and local levels (education, culture, health care, economy etc.) has not yet reached the stage that would ensure the functional inclusion of education system into wider socio-economic processes and development arising from knowledge-based society through the concept of life-long learning."

Following the NDP-RS 2001-2006 SWOT Analysis in the introduction to the Programmes and Sub-programmes within the Development Priority 2: Knowledge, Human Resource Development and Employment, and based on its Sub-programme 2.1.d Design and development of systems to promote Lifelong Learning (p. 128), the project will focus on activities aiming at improving education and training supply for young and adults, in order to give them skills and knowledge necessary to function at work and in society, marked by the processes of globalisation, rapid technological development and EU integration.

2.5. Cross Border Impact: NA

3. Description

3.1 Background and justification

The European Council in Lisbon in March 2000 has confirmed that “*Europe has indisputably moved into the Knowledge Age, with all that this implies for cultural, economic and social life (...) that the move towards lifelong learning must accompany a successful transition to a knowledge-based economy and society (...) that Europe’s education and training systems must adapt*”\(^1\) in order to enable the realisation of the new concept of lifelong learning as all

\(^1\) C.f. Memorandum on Life-Long Learning, Lisbon March 2000
purposeful learning activity, undertaken on an ongoing basis with the aim of improving knowledge, skills and competence, promoting active citizenship, employability and social cohesion.

Knowledge is thus formally recognised as an increasingly important factor for the competitiveness of a national economy, and continuous acquisition of knowledge – lifelong learning - as a pre-condition for decreasing present and preventing future discrepancies on the labour market and for ensuring conditions for higher quality of life, greater social justice and social cohesion.

Slovenia has been actively involved in the development of the concept of lifelong learning ever since the adoption of the Hamburg declaration. It is usually associated with adult education as a complement to the education and training systems for the young and has contributed to a number of approaches and good practices in this area. To associate the concept of lifelong learning with the mainstream education and training systems is a relatively new development, and therefore its impact has yet to be seen in the labour market. It requires preparation of new training programmes which would better suit the needs of the young to meet the challenges in the future labour markets and the present needs of adult job-seekers to be better able to adapt to the overwhelming pace of change. A major shift in the attitudes and values of the personnel of education institutions is required to make this possible. The adoption of new curricula and the ownership of staff is to be achieved in a synchronised bottom up and top down process.

Indicators show that there are many obstacles Slovenia will have to face before any significant outcomes can be seen in labour market. Education needs to be seen as a lifelong learning process. Continuing vocational training should be paid special attention to increase competitiveness and productivity of businesses. Currently less than 33% of adults participate in any education or learning activities.

The infrastructure requires modernisation, and innovative approaches to teaching, learning and curriculum development need to be applied to efficiently implement the concept of lifelong learning.

Education and training provision doesn’t follow the new demand for competencies and modern methods of education, training and re-training and certification of professional qualifications fast enough. The process of adaptation and restructuring of educational institutions is too slow.

The curricula as defined on the national level are too detailed, closed and traditionally subject oriented and do not leave enough room for decision in concrete environment. Previous revisions of education and training programmes have not sufficiently considered the necessity for balancing ratios and possibilities of integrating general and vocational knowledge. Education and training supply is not sufficiently adapted to the needs of economy, and neither to social and individual development needs. Even though an important step has been made towards opening of programmes in the field of vocational education and training to initiatives from and decision-making in local coalitions, conditions for a high quality realisation of this possibility are not yet assured. A need for new training programmes has been assessed as well. In this context, it is also important to highlight the problem of inadequate conditions and lack of incentives for a high quality development of new vocational standards (particularly in new occupational areas), as well as for recognition of knowledge acquired in formal, informal and non-formal learning, especially through work.
On the level of post-secondary education, the lack of transparency and flexibility of the programmes obstructs the mobility in education, as well as the transition between education and work. Postgraduate programmes are still too fragmented and their links to the economy are weak in the transfer of knowledge and research potential (among the students and employed). Quality of the whole of post-graduate study is not on the desired level, and the development of the specialisation post-graduate study is especially slow. Co-operation among companies, research institutions, universities and other educational institutions should be strengthened also to facilitate and promote the process of linking Slovene companies (clustering) thus accelerating transition of knowledge from research to companies.

Quality and flexibility of education and training supply affects the “losses in education”. Slovenia still faces a relatively high school dropout rates, particularly in vocational education and training. The dropout results in an inflow of non-qualified workforce, young job seekers without formal education, on the labour market. Furthermore, dropout and repetitions represent a loss for the society and individuals, from the economic as well as life quality points of view. Young people leaving school without qualification are exposed to a greater risk of social marginalisation, exclusion.

International comparability and competitiveness of the knowledge transferred in education and training is becoming crucial for economy and individuals to cope with challenges brought by the processes of globalisation, rapid technological development and EU integration.

The project is fully in line and will contribute to national actions around the orientations as set in: the Communication from the Commission Making a European Area of Lifelong Learning; the Report from Education Council to the Europe Council on The Concrete Objectives of Education and Training Systems, with the related Detailed Work Programme, and most recently, the Copenhagen Declaration.

Against this background, the present project supports the implementation of the national strategies for education of young and adults, addressing specifically those aspects that are of crucial importance for the labour market and social inclusion situations. In view of the future participation in the EU structural policies and instruments, the project will pilot the implementation of a structural type of measure and thus essentially contribute to the process of assuring appropriate organisation, project management staff and infrastructure for an efficient and quality management, monitoring and evaluation functions, as required by the EC structural funds regulations.

3.2 **Linked activities**

1. Preparation of the development plan as required by the European Structural Funds regulations (Single Programming Document).
5. National Development Programme aiming at testing the new Guidelines for the preparation of Vocational Educational and Training (VET) programmes (follow-up of the Phare 97 project for Modernisation of Curricula, Certification and Assessment in VET in Slovenia).
6. National Adult Education Programme as approved by the Council of Experts of the Republic of Slovenia for Adult Education.

7. National schemes in the areas of teacher training, curriculum development, guidance and counselling, investments (in particular in the area of information technology).

8. National schemes in the areas of teacher training, curriculum development, guidance and counselling, investments (in particular in the area of information technology)

9. Community Programmes in the area of education, training and youth

10. SL 9804.02.01: Phare 98 SPP – Pilot action in Savinjska Region – Developing the Regional Employment Financial Instrument

11. ZZ 9719: Phare 97 SPP-ESF, managed by European Training Foundation (ETF), Torino

12. ZZ 9719: Phare 97 SPP-ESF: Sustainability of National Training Institute activities managed by ETF and DG Employment and Social Affairs

13. SI 00002.02: Phare 2000, Building up the Labour Market Indicators system for following up the National Employment Strategy and the National Employment Action Plan

14. SI 00004.02: Phare 2000, Activating employment potentials at the local level, in Savinjska region

15. SI 0106.01: Phare 2001 Economic and Social cohesion – Strengthening Slovenia on the local level

16. SI 0202.08: Phare 2002- Capacity building for the implementation of the acquis related to mutual recognition of qualification

17. SI0205.01/02/03 - A Package for Institution Building for the future implementation of the EU Structural Funds (SF) and the Cohesion Fund (CF) in Slovenia, in particular the SI 0205.02 Development of programming and management capacities for European Social Fund (ESF) implementation


The CbC relevant projects:

0109 Slovenia-Hungary

1. SLO0109.01 - Joint Economic Space

2. SI 0308.01 - HU 03 Maximisation of human resources potentials in the border region

3. 3 Results

Against the background as described above (c.f. 3.1): requiring that education and training provision can be adapted so as to deliver knowledge, skills and competencies individuals need to function at work and in society throughout their lives, the present Phare scheme will support the implementation of national actions aiming at improving quality, efficiency and flexibility of vocational education and training systems, in particular the revised Guidelines for the preparation of vocational education and training programs.

A national Development Programme has been prepared and launched to gradually put in practice the revised Guidelines, which bring novelties in three main areas: design of VET programs
(modularisation, (20%) opening of the curriculum); integration between general, professional and practical educational contents, and basic skills.

In this wider national context, the present Phare scheme will be oriented towards achieving the following main results:

(1) **Modularised and competence based educational programmes developed and pilot implemented for at least 2 economic branches**, in accordance with the *Law on National Vocational Qualifications* and leading to higher competency and employability of VET schools students, apprentices and adults.

Special attention will be given to economic areas, identified as priorities by the economy, on national and local levels, emphasising the integrated approach to define knowledge, skills and competencies that will enable individuals to contribute to economic and social life throughout their lives (basic skills for the knowledge society, IT, ability to learn, social skills, active citizenship...).

Projects under this priority will contribute to the improvement (efficiency, quality and flexibility) of education and training supply (both initial and further education) by enhancing the processes of: assessment of changes in employment (identification of new occupations) and in qualification needs (development of new occupational standards); structuring modularised and competence based education and training programmes; preparation of teachers, trainers and mentors on on-the job training for a quality implementation of modularised and competence based education and training programmes (enabling them also to use the available ICT support, to apply modern learner oriented teaching methods and approaches; to specialise for adult education; to assess (value and certify) prior learning; to integrate general knowledge and competence based skills).

The scheme will enhance integrated (partnership) approach in design, delivery and evaluation of education and training supply. Teachers, trainers, counsellors, school managers as well as social, economic and other local partners involved in this process will be prepared for a quality implementation of the changes brought by the national curriculum reform guidelines as an important step towards a more flexible education and training system (such the 20% of the curriculum open to specific regional and economic needs, modular structure of the curriculum, integration between general, professional-theoretical knowledge and practical skills acquisition, basic skills). Special attention will be given to systematic acquiring of teaching abilities and skills to staff coming from the economy and to the establishment of joined teams of experts from the spheres of education and work.

(2) **At least 10 new shorter training modules/courses developed** (including basic skills and recognition of competencies acquired in informal and non-formal forms of learning), all implemented on a pilot basis

Priority will be given to training initiatives that would lead or assure the bridge towards achieving recognized vocational qualification (national certificate), including the recognition of prior learning, allowing to enter into employment and/or move within learning (education and training) path.
The results can be complementary to those under the Priority 1, as projects will also pilot innovative and integrated approaches in design, delivery and evaluation of education and training programs/modules; prepare for the assessment of prior learning (certification) of knowledge, skills and competencies acquired in formal, informal and non-formal forms of learning; and enhance the participation of social, economic and other partners interested and involved in the design, delivery and evaluation of this type of education and training programs for adults.

Special attention will be given to an adequate integration of basic skills for the knowledge society which are those that give an individual a secure foundation for life and work (thus covering vocational and technical skills, as well as social and personal competencies).

(3) **At least 20 training courses and approaches to introducing change, prepared and implemented on a pilot basis,** aiming at further enhancing the processes of assuring quality in preparing, implementing and evaluating education and training programs; improving education and training for teachers, trainers, counsellors and staff so that their knowledge and skills respond both to changes and expectations in economy and society, as well as to the specific needs of the varied groups (young and adults) they teach, train, orient and assess.

Priority will be given to innovative approaches in learning and counselling, the needs of teachers, trainers and staff related to a quality and efficient development, implementation and (self)-evaluation of education and training programs; assessment of prior learning; integrated delivery of lifelong learning concepts, basic skills, IT, management and organisation in education and training both for young and adults.

Development of teacher training courses under this priority will be based on EU orientations and recommendations related to new lifelong learning concepts, including the concrete future objectives of education and training systems, to joint employment and social inclusion strategies, also in the view of the European structural funds support.

(4) **At least 500 persons trained in pilot courses supported within the priorities 1 and 2,** and at least 1000 teachers, trainers and staff trained in pilot TT courses

Furthermore, the project will result in three less measurable but as important results, namely

(5) **Regional/local development coalitions created around the pilot projects** (as a possible basis for sustainable links on a regional/local level): innovative models of co-operation between educational institutions, business enterprises, research institutions, major public sector partners and others will be encouraged by the project implementation methodology. Strengthening the links with working life, research and society at large is valuable not only for assuring that the development of education programs follows the real needs of the economy and the labour market, but also for facilitating (transition between the world of work and learning) work placements for learners as well as teachers and promoting links between formal and non-formal learning activities.
(6) A strengthened network of structures involved with design, planning, delivery and evaluation of learning, able to co-operate and apply innovative approaches in the development and implementation of vocational education and training, lifelong learning concepts and to assure quality and efficient transfer of knowledge. The scheme will aim at improving the capacity of regional entities to generate new occupations and ensure the balance between educational offer and labour market demand.

(7) More experienced staff with clearer administrative systems for assuring quality and efficient implementation of European social fund type of measures.

**Broad target groups**

The broad target groups are the following:

- Organisations involved with design, planning and delivery of education, training and counselling for young and adults
- Teachers, trainers and staff, including the counsellors, directors of schools, organisers of learning, mentors in companies
- Teachers threatened with unemployment
- Young and adult participants in learning activities
- Young and adults not participating in any form of learning (employed and unemployed, drop-outs, persons with addiction problems, ex-offenders…)
- Adults with poor literacy skills and competencies
- Social partners, partners for the economy and local environment

### 3.4. Activities

**GRANT SCHEME**

**With the main objective**

- to improve education and training supply for young and adults, in order to give them skills, knowledge and competencies necessary to function at work and in society, and to expand their knowledge throughout their lives - thus providing also a broad background to preventive actions aiming at reducing the number of young people who drop out of schools and actions aiming at reducing deterioration of basic skills and competencies of socially excluded adults - and in the view of the above expected results,

the Grant scheme will support pilot projects including and possibly combining activities under the three main components, as follow bellow *(c.f. Eligibility od projects, Eligible type of activities).*

**Eligibility criteria**

**Eligibility of Applicants:**

Non profit-making or profit-making organizations, which do not make profits from the grant Scheme; non-governmental organisations; public sector operators registered for HR development activities;
Applicants will have to provide for development partnerships at regional/local level.

Applicants will have their seat located in Slovenia, their partners can have their seat located in Slovenia or EU/Phare countries.

**Eligibility of projects:**

**Size:**

The global indicative amount available for grant scheme will be 3,000,000 €. The grant scheme will be co-financed by Phare funds in the amount of 2,250,000 €, by national funds (public authorities) in the amount of 750,000 €.

The Grant scheme will support projects with a Phare grant of a minimum size of 50,000 € and maximum 300,000 €.

In all projects, the beneficiaries must participate with a 10% minimum own-financing.

The requested contribution from Phare and Slovene public authorities may not exceed 90% of the project cost.

No part of the eligible public grant, be it financed by Phare or by the Slovene public authorities, may cover payments towards or be offset against costumes duties, import duties, taxes or fiscal charges having equivalent effect.

**Duration:**

The expiry date of the project should be at least three months before the expiry date of the programme as indicated in the Financing Memorandum. The maximum duration of the project will be 18 months.

**Eligible type of activities:**

The activities will enhance mainly the processes of improvement of vocational education and training program supply and of education and training of teachers, trainers and staff as well as of other interested partners (social partner, partners from the economy and local environment), in order to enable them to follow and successfully implement the changes brought by the new VET and lifelong learning concepts and approaches. Modularised competence-based education and training programmes will be prepared on national vocational standards (following the Law on NVQ), implemented on a pilot basis (in accordance with the national regulation on pilot implementation of novelties) with an integrated necessary counselling support to teachers, trainers and participants and with supporting basic skills programmes for the most vulnerable adult groups.
(A) Development and implementation (on a pilot basis) of vocational education and training modules/programs (including programmes for improving basic skills and competencies)

The activities (related to the above main priorities (1), (2) and (4)) will contribute to the process of structuring and diversifying modularised and competence based education and training programmes/modules, in accordance with the needs of the economy, labour market and individuals to function at work and in society, as well as to expand their knowledge throughout their lives (assessment of changes in employment and in qualification needs may be needed where new occupations haven't been identified or vocational standards developed yet). Curriculum development and implementation will include the development of models of cooperation between the worlds of work, education, training, research and other key actors on regional/local level and the promotion of links between formal and non-formal learning activities; dissemination and evaluation.

(B) Training of teachers, trainers and staff

The activities (related to the above main priority (3) and (4)) will be aiming at further enhancing the development and implementation of teacher training courses, assuring quality in preparing, implementing and evaluating education and training programs; improving education and training of teachers, trainers, counsellors and staff, so that their knowledge and skills respond both to changes and expectations in economy and society, as well as to the specific needs of the varied groups (young and adults) they teach, train, orient and assess.

Teachers, trainers and staff have to become better able to: follow and implement changes brought by the curricular reform; apply innovative approaches in learning, counselling and guidance both for young and adults; deliver lifelong learning concepts (basic skills, IT, ability to learn, active citizenship, social cohesion); respond to specific needs of varied groups of young and adult learners that they teach, train, support, orient; perform a quality assessment of knowledge, skills and competencies acquired through different forms of formal, informal and non-formal learning (valuing prior learning). Finally they also have to acquire necessary management, organisational and communication skills, in order to adequately manage the change in their work and relations to the local environment, to Europe and the world.

(C) Guidance and counselling to participants, counselling and professional support to teachers, trainers and staff

The activities (related to the above main priorities (1), (2) and (4)) will be oriented towards supporting young and adults in different phases of learning activities, related to new/revised education and training programmes/modules (orientation and accompanyment), as well as towards assuring necessary professional support to teachers, trainers and staff in introducing the change in the phase of the implementation of new/revised education and training programmes/modules.

The means
The above activities will be implemented through a Phare Grant Scheme, in accordance with the *Practical guide to Phare, Ispa & Sapard contract procedures*, published and regularly updated on the Europa web-site


Grants within the LLL Grant Scheme will be awarded following the prescribed tendering procedures (public call for proposals, evaluation with possible engagement of assessors who are not members of the Evaluation Committee, in case of high number of proposals received, contracting), for the above listed activities.
3.5. Lessons Learned

The Ministry of Education, Science and Sport hasn’t implemented Phare Grant Scheme projects in the past, therefore there is no MoESS specific conclusions or recommendations that could be underlined under this section.

Nevertheless, some relevant experience has been gained by the Ministry and its structures through the implementation of past Phare projects in the area of vocational education and training (Phare VET 94 Reform Programme, the Phare MOCCA 97 Programme) and through the participation in the implementation of the Phare grant schemes in the area of employment (the Phare 2000 Activating employment potentials at the local level and the Phare 2001 Strengthening Slovenia on the local level). The OMAS interim reports for these two projects are currently in the preparation phase (October 2002).

4. Institutional Framework

The Ministry of Education, Science and Sport will be responsible for the implementation and co-ordination of activities within the Phare Lifelong Learning project (testing its role of a Final Beneficiary for the Measure 2.3.1 Design and development of systems to promote Lifelong Learning).

The experience gained through the project might lead to a change in the institutional arrangement described, taking into consideration also the recommendations of the Phare 2002 Twinning projects SI0205.01/02/03 and the project (under approval) Phare 2002 Development of capacities for the implementation of structural assistance.

The project Steering Committee will join all the relevant ministries, institutions and organisations on national and regional levels. It will be important for the Committee to start operating from the very beginning of the project, in order to achieve agreement on priority occupational areas/vocational standards/scientific disciplines.

In view of the requirements related to the monitoring of the Phare ESC Programme, the participation of the National Agency for Regional Development will be obligatory.

The National Agency for Regional Development (NARD) coordinates the implementation of the ESC Programme. The NARD is obliged to monitor physical and financial indicators of the projects implementation under this programme (including payments of Phare and national co-financing). This is reported in the SMSC reports and at the Phare Review meetings. The Contracting Authority (CA) has overall responsibility for administrative, technical and financial management of the project. CA is therefore obliged to report to the NARD on the project physical and financial (Phare, private and public co-financing) status on the monthly basis for the whole project duration. CA will ensure necessary human resources for the technical management of the project.
5. **Detailed Budget (in €)**

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<th>Phare support</th>
<th>National Public Co-financing</th>
<th>TOTAL</th>
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<td>Investment</td>
<td>Institution</td>
<td>Total Phare (= I+IB)</td>
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<td>Support</td>
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<tr>
<td>Contract: Grant Scheme</td>
<td>2,250,000</td>
<td>2,250,000</td>
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<td>TOTAL</td>
<td>2,250,000</td>
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The beneficiaries must participate with a 10% minimum own-financing. The public grant, financed by Phare and Slovene public authorities, may accordingly not exceed 90% of the project cost. No part of the eligible public grant, be it financed by Phare or by the Slovene public authorities, may cover payments towards or be offset against costumes duties, import duties, taxes or fiscal charges having equivalent effect.

The national public co-financing (national public authorities)) will be assured within the National Budget Memorandums 2004-2006 (for the foreseen commitment and disbursement period of the projects under the Phare SNP 2003). The Ministry will follow possible national specific guidelines for the EU funding co-financing. Presently, the funds are included in the Ministry’s content related budgetary items. It is to be noted that the Ministry manages since NBM 2001 a special budgetary item aiming at supporting preparatory activities for the European Structural Funds: 1512 Preparations for Structural Funds.

6. **Implementation Arrangements**

6.1. **Contracting Authority:**
Ministry of Education, Science and Sport  
Trg OF 13, 1000 Ljubljana, Slovenia  
Mr. Slavko Gaber, PhD., the Minister  
Tel.: + 386 1 478 4708  
Fax: + 386 1 478 4719

**Implementing Agency:**
Ministry of Finance  
Central Finance and Contract Unit (CFCU)  
Beethovenova 11, 1000 Ljubljana, Slovenia  
Mr Peter Škofic, PAO  
tel: + 386 1 478 6203  
fax: + 386 1 478 6204

The project will be implemented in accordance with the Practical Guide to Phare.

6.2. **Twinning:** NA
6.3. Non-standard aspects: NA

6.4. Contracts:

Number of contracts foreseen: 1

1 Grant Scheme amounting to 3,000,000 €

7. Implementation Schedule
(depending on the date of signature of the Phare NP FM 2003)

If the FM signed in July 2003

7.1. Start of tendering Second half of 2003

7.2. Start of project activities First half of 2004

7.3. Project Completion 2005 (for the commitment period)
                          2006 (for the disbursement period)

8. Equal Opportunity:

The proposed project promotes by its nature the equality of opportunities of men and women, as well as of different categories of disadvantaged groups of people, regarding their equal access to quality education, training and counselling activities, as an important element of the social inclusion strategy.

9. Environment: NA

10. Rates of Return: NA

11. Investment Criteria:

11.1. Catalytic effect

Phare’s support will catalyse the creation of conditions and knowledge for the implementation of the European structural policies, in particular in the European social fund policy field of life-long learning, based on a partnership approach: between national and local partners, formal and informal learning opportunities.

The Phare Grant Scheme as conceived represents a unique possibility for such action before the
accession to the European structural funds.

11.2. Co-financing

Besides the required and indicated national funds (public authorities and beneficiaries) co-financing by the Ministry of Education, Science and Sport, the Phare funds will serve as a tool to attract possible additional funds from other sources.

11.3. Additionality

The Phare Grant Scheme will allow an essential up-grading of the existing national schemes, in financial terms as well as in terms of its approach and methodology.

11.4 Project readiness and size

The relevant studies justifying the investment in the development of lifelong learning systems have been made in the framework of the preparation of the related measures in the National Development Plan RS 2001-2006.

A complete Tender Dossier, including the Guidelines for Applicants, will be prepared in the first quarter of a year after the signature of the Phare SNP 2003.

The Grant Scheme will amount to 3,000,000 € - 2,250,000 € from Phare and 750,000 € from national public funds (National public authorities) - and support projects with a Phare grant of a minimum size of 50,000 € and maximum 300,000 €.

The rate of the available maximum public support (Phare and national public co-financing) is 90%; in all projects, the beneficiaries must participate with a 10% minimum own-financing.

11.5 Sustainability:

Long-term sustainability of projects will represent one of important criteria for the selection of projects. Sustainability of the scheme will be assured with the transition from Phare to European structural instruments.

11.6 Compliance with the state aids provisions

All actions financed by Phare will be carried out in line with the Practical Guide for ISPA, SAPARD and PHARE contract procedures and will respect the state aid and competition provisions of the Europe Agreement.

11.7 Contribution to National Development Plan 2001 - 2006

The project is a part of the overall development strategy, as defined in the NDP RS 2001-2006. It responds to the NDP-RS 2001-2006 Chapter 3: Analysis and Development Scenario: 3.2. Preconditions for the transformation into knowledge-based society, 3.2.3. Human resource development: particularly 3.2.3.2. Education and Training (p. 69 - p.71).
Following the NDP-RS 2001-2006 SWOT Analysis in the introduction to the Programmes and Sub-programmes within the NDP-RS Development Priority 2: Knowledge, Human Resource Development and Employment, and based on its Sub-programme 2.1.d Design and development of systems to promote Lifelong Learning (p. 128), the project will support activities aiming at improving education and training supply for young and adults, in order to give them skills and knowledge necessary to function at work and in society, marked by the processes of globalisation, rapid technological development and EU integration.

12. Conditionality and Sequencing:

Creation of the LLL Project Implementation Team with sufficient staff and necessary infrastructure.

The Grant Scheme Call for Proposals prepared by the LLL Project Team in co-operation with the relevant professional institutions and bodies involved with design, planning and delivery of learning

Approval of the tender documentation by the CFCU and the EU Delegation

Open call for proposals published

For the Grant Scheme, potential project promoters informed, technically competent and independent selection committee nominated and trained, selection done and the evaluation report approved, contracts prepared and signed by all the due parties

Monitoring and evaluation system in place

Projects under the Grant Scheme evaluated
ANNEXES TO PROJECT FICHE

1. Logical framework matrix in standard format (compulsory)

2. Detailed implementation chart (compulsory)

3. Contracting and disbursement schedule by quarter for full duration of programme (including disbursement period) (compulsory)

4. Reference to feasibility / pre-feasibility studies

5. List of relevant Laws and Regulations

6. Reference to relevant Government Strategic plans and studies (may include Institution Development Plan, Business plans, Sector studies etc)
## Annex 1

### LOGFRAME PLANNING MATRIX FOR

#### Project Phare 2003 ESC Life-long Learning

<table>
<thead>
<tr>
<th>Programme name and number</th>
<th>Life-Long Learning 2003/004-938-17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contracting period expires:</td>
<td>30 November 2005</td>
</tr>
<tr>
<td>Disbursement period expires:</td>
<td>30 November 2006</td>
</tr>
<tr>
<td>Total budget:</td>
<td>Million € 3.00</td>
</tr>
<tr>
<td>Phare</td>
<td>Million € 2.25</td>
</tr>
</tbody>
</table>

### Overall Objective

To raise the level of lifelong learning culture in Slovenia by assuring quality, relevancy and accessibility of education, training and counselling as key elements of life-long learning policy, with the aim of improving knowledge, skills and competencies of people within a personal, civic, social and employment-related perspective, and thus to contribute to the NDP-RS strategic aim of assuring a balanced and sustainable economic and social development of Slovenia in the context of its accession to the EU.

**Objectively verifiable indicators**

- Participation in education and training:
  - Percentage of population participating in education and training by sex, age groups and employment status
  - Unemployment rate
  - Gross domestic product per capita.

**Sources of Verification**

- Statistical data
- Joint Assessment of the Employment Policy Priorities (JAP Implementation Reports)
- Commission regular reports

### Project purpose

To test institutional capacities and mechanisms for the implementation of structural type of measures in the area of Lifelong Learning (within the European social fund policy field c: Design and development of systems to promote LLL - DRP-RS 2001-2006 2.1.d) focusing on activities aiming at improving education and training supply for young and adults in order to give them skills and knowledge necessary to function at work and in society, and to expand their knowledge throughout their lives.

**Objectively verifiable indicators**

- Timely and quality implementation of the project (ESF type of measure)
- Satisfaction rate of beneficiaries

**Sources of Verification**

- SMSC Reports.
- Evaluation reports.

**Assumptions**

Sufficient and qualified staff in place.
<table>
<thead>
<tr>
<th>Results of project</th>
<th>Objectively verifiable indicators2(see note p.18)</th>
<th>Sources of Verification</th>
<th>Assumptions and Risks</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Modularised and competence based educational programmes developed and implemented on a pilot basis, for at least 2 economic branches.</td>
<td>• Number of persons:</td>
<td>Reports by experts and selected projects the grant scheme. SMSC Reports. Individual evaluations (participants, employers). Evaluation reports.</td>
<td>Quality of projects (competencies of project promoters, managers and experts) Interest and competencies of partners (local and EU).</td>
</tr>
<tr>
<td>• At least 10 new shorter training programs/modules (courses), including basic skills programs and modules, prepared and implemented on a pilot basis</td>
<td>- persons participating as trainees in pilot projects (by gender, age, level of educational attainment)</td>
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<td>• At least 20 teacher training programs and approaches to introducing change, prepared and implemented on a pilot basis</td>
<td>- teachers, trainers and staff participating in training</td>
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<tr>
<td>• At least 500 persons trained in pilot modules/courses within the priorities 1 and 2</td>
<td>• Number of projects (min 10 – max 60)</td>
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<tr>
<td>• At least 1000 teachers, trainers and staff trained in pilot TT courses/modules by the end of 2005</td>
<td>• Number of days, hours of training</td>
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<tr>
<td>Activities</td>
<td>Means</td>
<td>Assumptions</td>
<td></td>
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<tr>
<td>(A) Development and implementation (on a pilot basis) of vocational education and training modules/programs (including programmes for improving basic skills and competencies) in accordance with the needs of economy, labour market and individuals to function at work and in society, an to expand their knowledge throughout their lives (integrating a possibly needed assessment of changes in employment and in qualification needs), including the development of models of co-operation. The activities are related to the main priorities (1), (2) and (4).</td>
<td>Grant Scheme</td>
<td>Project management staff trained in the Phare procedures and reporting. Clear matching funds’ procedures (National-EU).</td>
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</tr>
<tr>
<td>(B) Training of teachers, trainers and staff, related to the above main priority (3) and (4), will be aiming at further enhancing the development and implementation of teacher training courses, assuring quality in preparing, implementing and evaluating education and training programs; improving education and training of teachers, trainers, counsellors and staff, so that their knowledge and skills respond both to changes and expectations in economy and society, as well as to the specific needs of the varied groups (young and adults) they teach, train, orient and assess.</td>
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<tr>
<td>(C) Guidance and counselling to participants in learning, counselling and professional support to teachers, trainers and staff: related to the above main priorities (1), (2) and (4), the activities will be oriented towards supporting young and adults in different phases of learning activities, as well as towards assuring necessary professional support to teachers, trainers and staff in introducing the change in the phase of the implementation of new/revised education and training programmes/modules.</td>
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2 Note: Quantification of indicators

Taking into account the available Phare investment funds, the EC related recommendation to set the preparation of bodies designated to implement structural type of measures upon accession as primary Phare grant schemes’ objectives and The New Programming period 2000-2006 methodological working papers papers (WP 3 Indicators for Monitoring and Evaluation: An indicative methodology, field of intervention 23 Developing educational and vocational training, Assistance to Systems), the core grant scheme indicators would be primarily of a qualitative nature: (1) experienced project management staff and tested structural assistance programmes implementation arrangements, (2) improved quality, efficiency and flexibility of education and training supply, the number of participants in trainings not being the core indicator.

Preconditions:

Sufficient staff and infrastructure assured.
National co-financing earmarked in the budget.
The number of projects to receive a grant can only be quantified in approximate terms, since the scheme will define minimum and maximum possible grant support, i.e. max. 60 (50,000 €) and min. 10 (300,000 €).
Annex II : DETAILED IMPLEMENTATION CHART

Phare funds: 2.25 million €
National co financing: 0.75 €
TOTAL: 3.00 €

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<th>Activity</th>
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Annex III: CONTRACTING AND DISBURSEMENT SCHEDULE (by quarter for full duration of the programme)

Phare funds: 2.25 million €
National co financing: 0.75 €
TOTAL: 3.00 €

### Phare funds

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<th>Contracting schedule</th>
<th>I/04</th>
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</table>
Annex 4: Reference to Feasibility /Pre-feasibility study

c.f. NDP-RS 2001-2006 Analysis and Ex-Ante Evaluation
Slovenia: Review of Progress in Vocational Education and Training Reform 2002
Annex 5: List of relevant Laws and Regulations

Organisation and Financing Act OJ RS 12/96 (Amended in 2001)

Laws and Regulations for different sub-systems of education and training in RS (kindergartens, primary schools, secondary general, gymnasium, VET, higher education and education of adults).

Act on the orientation of children with special needs” OJ RS 54/2000

National Vocational Qualifications Act (Official Journal of the Republic of Slovenia, No 81/00)

The Act on Regulating the Procedures for Recognition of Qualifications of Citizens of EU Member States and concerning access to Regulated Professions in the Republic of Slovenia (2002-01-0909)

Regulation for the Implementation of Measures of the Active Employment Policy (Official Journal of the Republic of Slovenia, 64/01)

Balanced Regional Development Act (Official Journal of the Republic of Slovenia, 60/99)

COUNCIL REGULATION (EC) No 1260/1999 of 21 June 1999 laying down general provisions on the Structural Funds

Annex 6:

Reference to relevant government strategic plans and studies (may include institution development plan, business plans, sector studies etc)

The key development orientations in the field of education and training are defined in the White Book on Education and Training in RS2 (1995). The paper gave conceptual foundations for the structural reform of the education and training system, which was accompanied by a review of the educational programmes and learning contents. The basis for the latter was defined in the Guidelines for curriculum reform, which stresses the importance of responding to global development changes in the field of culture, science, technology and economy, as well as in the social and political life.

The development trends of the White Book were operationally upgraded in the second half of the nineties, mainly in the two national strategic documents: Professional Starting Points for the National Programme for the Education of Adults and National Programme for Higher Education in the Republic of Slovenia (adopted by the Parliament in February 2002).

A proposal of the National Youth Programme in the field of youth policy was prepared in 1999 and was later developed into the Resolution on the Strategy for the Youth Policy Development until 2001.

Beside the mentioned documents, a series of important strategic documents have been prepared within the Phare '97 Modernisation of Curricula, Certification and Assessment in Vocational Education of for Youth and Adults project, in particular the Accession Strategy for the Republic of Slovenia in the Field of Human Resource Development and the Memorandum on further development of occupational and vocational education in the Republic of Slovenia (2000).

Among the latest reference documents, a National report on Lifelong Learning (2001) has to be mentioned, in the framework of a Europe wide consultation on the Memorandum on Lifelong Learning launched at the EU Council in Lisabonne (2000), as well as the Guidelines for the preparation of educational programmes in lower and upper vocational and professional secondary education (follow-up of the Phare 97 project for Modernisation of Curricula, Certification and Assessment in VET in Slovenia).

The different government strategic documents and studies in this field, with the Strategy for Economic Development of Slovenia at the forefront, represented the basis for the preparation of the respective chapters in the National Development Plan of the Republic of Slovenia 2000-2006. The NDP-RS 2001-2006, together with its ex-ante evaluation by the Slovene Institute for Economic Research, is the main background document of the projects.

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2 Promoting life-long education, providing the possibility to acquire general education for the whole population and highest possible education to as many people as possible, while keeping the already reached level of expertise, and also providing the possibility of reaching highest possible level of creativity, equal opportunities and preventing social exclusion